VOSS Automate
Business Admin Portal Guide

Release 21.2

Jan 14, 2022

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Contents

1. What's New

1.1. Business Admin Portal Guide: Release 21.2

- EKB-10181: Add "Fetch real-time phone status" action to Phones page: *Phones*
- EKB-10475: Caller Input fields on BAP show the internal names on the summary page: *Voicemail*
- EKB-10481: Phone or Device Profile Service URL field is not populated when Subscribing to IP Phone Service: *Phones*
- EKB-10481: Phone or Device Profile Service URL field is not populated when Subscribing to IP Phone Service: *Extension Mobility*
- VOSS-873: Support Microsoft Exchange Online Management (EKB-10590: Add Icon to BAP Subscriber List when Exchange Mailbox exists) . See: *View and Manage Subscribers*

  Added details for using Microsoft Exchange in VOSS Automate
- VOSS-873: Support Microsoft Exchange Online Management (EKB-10405: Need an Exchange Card on BAP Multi Vendor Subscriber) . See: *View and Manage Subscribers*

  Added details for using Microsoft Exchange in VOSS Automate

2. Introduction to the Business Administration Portal

The Business Administration Portal is an access-controlled, simplified user interface that runs in parallel to the Admin Portal, and allows you to perform common UC tasks, for example, to add, update, or delete subscribers, phones, and lines, or to view and manage associated subscriber and phone features and services, such as voicemail, single number reach (SNR), speed dials, and extension mobility.

Access to the Business Admin Portal is controlled from with the Admin Portal.

VOSS Automate 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 Automate 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

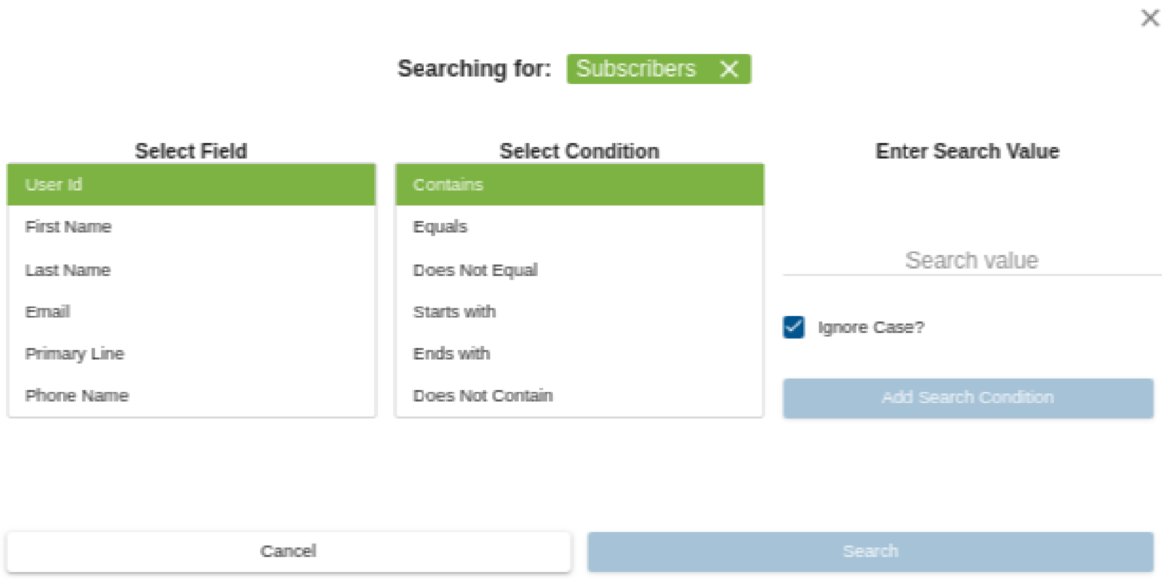
5.1. Search

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.



- 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 appled 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:

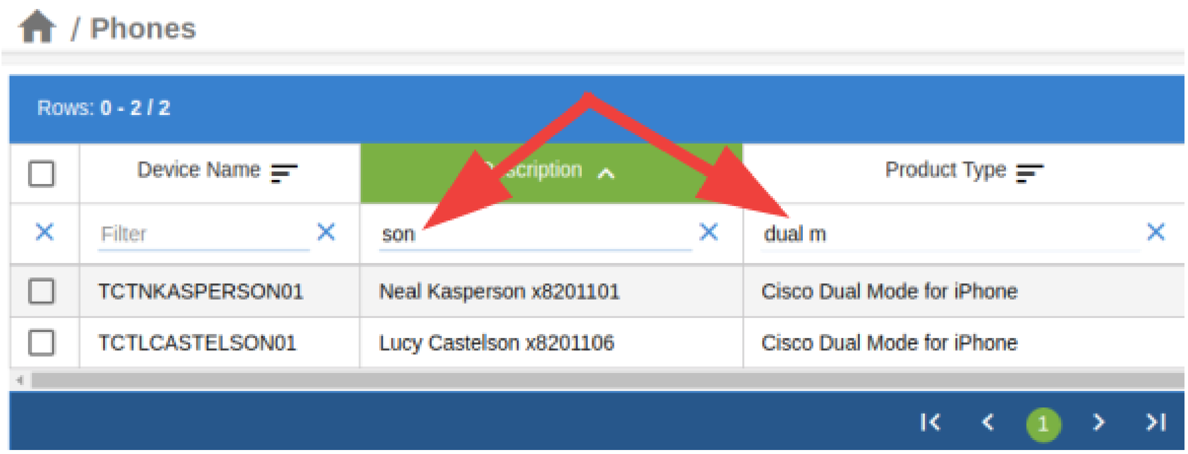
    - Input will match sub-strings of column values.
    - The filter will return rows that *contain* the filter value as a sub-string.

      For example, a column filter `ers` in a **Username** column will match both `lakendra.ingersoll` and `tisha.macpherson`.
    - The filter condition is case-insensitive.

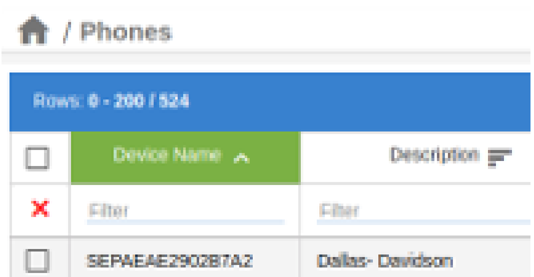
      For example, any of the column filters `ERS`, `Ers` or `ers` in a **Username** column will match `lakendra.ingersoll` and `tisha.macpherson`.

    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”.



3. 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.



4. Once the result rows are returned, a table header above the header rows displays the filter.
5. 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.

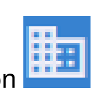
Note: If there is an active filtered list, column sort can only be applied to a the filtered column.

5.2. Organizations

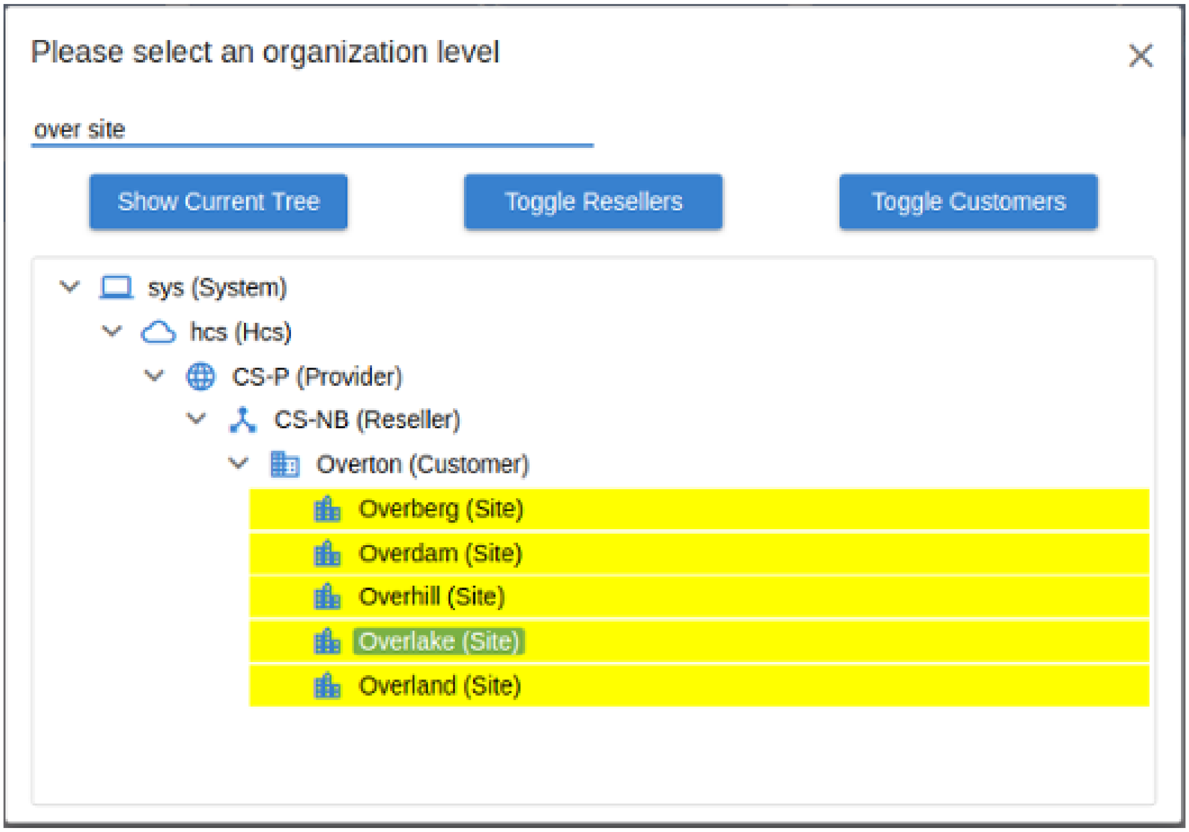
5.2.1. Navigate Organizations

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.

Perform these steps:

1. Log in to VOSS Automate (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.

Related Topics

- Site Defaults Doc Templates in the Core Feature Guide.

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	Defined via a macro in the CUSTOMER_TEMPLATE and the algorithm chosen for CUCM Group selection, either *Least Utilized* or *Default*. See CUCM Group Selection in the Core Feature Guide for details.

Related Topics

- CUCM Group Selection in the Core Feature Guide.
- Configure CUCM Groups in the Provider HCS Dial Plan Management Support Guide.

Device Defaults Tab

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

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	When this check box is selected, the E164 Mask will use the National format of the associated E164 Number. 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. 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 {{ macro.SDD_QAS_E164Number_MCR }}. See the "Reference CUCM Phone Template" CFT for an example configuration.

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 Parti-tion	
Default CUCM Line Alter-nate 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 Inter-nal 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 In-ternal CSS	Internal-CSS
Default CUCM Line Call Forward On Failure CSS	Internal-CSS
Default CUCM Line Call Forward On Failure Inter-nal 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: • 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 Automate. 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*
- Administrator User Interface in the Business Admin Portal Guide

5.3.2. View and Manage Subscribers

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

Note:

- To view multi vendor subscribers, your user role must be assigned a 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.

View All Subscribers

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

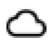
- All users from a given hierarchy and down (Reseller, Provider, Customer, or Site)
- A **Services** column, with icons representing the user's currently provisioned services (tooltips describe the service types and provisioning vendors).

To view all subscribers at a selected hierarchy:

1. Log in to the Business Admin Portal.
2. Choose the hierarchy.
3. Click (default menus) **Subscribers** in the left menu.
4. On the **Subscribers** landing page, either click the **Subscribers** counter on the page, or in the **Quick Actions**, click **View All Subscribers**.
5. View the list of subscribers, noting values in the columns:
   - Username
   - First name, last name, and email address
   - Entitlement profile

- User type
- Services (showing icons for services where the subscriber has the service enabled)
- Location (in the hierarchy)

The table describes the **Services** column icons:

Icon	Description
	Phones icon.
	Voicemail icon.
	Conferencing icon.
	Collaboration icon.
	Contact Center Express icon.
	Indicates a subscriber enabled for Microsoft Exchange mail. You can click on the icon to manage Exchange mailbox settings, such as permissions and calendar permissions.

View and Edit a Single Subscriber

Each subscriber can be viewed and updated via a dashboard that displays their user and service details. A subscriber's dashboard in the Business Admin Portal displays 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 that 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

The table describes components on a subscriber's dashboard in the Business Admin Portal:

<table>
<tr><th>Panel</th><th>Description</th></tr>
<tr><td>User Details</td><td>User Name
First Name
Last Name
Email Address
Entitlement Profile
Enable IM & Presence (Cisco user)
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 BusinessAdminUserDetailsFDP, the <code>previous_username</code> and <code>cucm_bkey fields</code> don't display since these are used only by the workflows.
IPCC Extension (Cisco user)
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:
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).</td></tr>
<tr><td>Quick Actions</td><td>Links to frequently used action, which may include one or more of the following, as defined by an administrator:
Reset Pin / Password
Delete All Services
Add Cisco User (Profile)
Refresh
Add Cisco User (QAS)</td></tr>
<tr><td>Service Cards</td><td>A service card displays for each service assigned and available to the subscriber. For example, there may be service cards for one or more of the following:
Cisco Voicemail
Cisco WebEx
Cisco Webex Teams
Cisco Contact Center
Microsoft Teams
Microsoft 0365
Microsoft Exchange - if enabled, click Edit to open the User Mailbox settings. (See also, Microsoft Exchange in the Core User Guide)</td></tr>
</table>

Service Cards on a Subscriber's Dashboard

Service cards on a subscriber's dashboard represent the services assigned or available to a subscriber. Edit actions in the service cards provide access to MACD functions allowed by the Business Admin Profile, and are defined via field display policies.

Service availability may depend on whether the appropriate devices and services are installed or enabled. For example, only Cisco-related quick actions and service cards display if the user only has Cisco services or if your system is set up only for Cisco (that is, a single vendor installation, in this example).

In some instances, the service card displays the service provisioning status, that is, whether the service is enabled. For example, Microsoft Teams and Microsoft Exchange must be explicitly enabled for the subscriber to have these services available.

For multi vendor users with services from two or more vendors (for example, Microsoft and Cisco), the service cards specify vendor information.

Fields are pre-populated for some services, based on the selected Quick Add Group (QAG), and on configuration templates chosen when adding the subscriber.

Subscriber Services

The **Services** column on the Subscribers list view in the Business Admin Portal displays icons that indicate the service type assigned to a subscriber.

To view or edit a subscriber's services from the Business Admin Portal:

1. Log in to the Business Admin Portal, and choose the relevant hierarchy.
2. From the Home page (or via the **Subscribers** menu), click **View All Subscribers** (or the **Subscribers** counter) to open the **Subscribers** summary list view.
3. Click on an icon in the **Services** column.

   Note: The presence of any icon in this column indicates that the subscriber has services assigned.

4. On the subscriber's services dashboard, view their user details, available quick actions, and a service card for each service assigned or available to this subscriber.

   The table describes the types of vendor services that may be available to VOSS Automate subscribers:

   Note: VOSS Automate supports multi vendor scenarios, allowing subscribers to be assigned services from different vendors, if this is configured for your system.

Microsoft subscriber services	Cisco subscriber services
Voice (a phone and line)	Cisco Phones
Voicemail	Cisco Extension Mobility
Microsoft Teams	Cisco voicemail
Microsoft Exchange mailboxes	Cisco Single Number Reach Cisco Jabber Cisco WebEx Cisco Contact Center Cisco Webex Teams

View and Update Microsoft Subscriber Services

To view and edit the details and services of a Microsoft subscriber in the Business Admin Portal:

1. Log in to the Business Admin Portal, and choose the relevant hierarchy.
2. Click the Subscribers menu.
3. On the **Subscribers** landing page, click the **Subscribers** counter, or click **View All Subscribers** to open the **Subscribers** summary list view.
4. Locate the relevant subscriber, and click on an icon in the **Services** column of the **Subscribers** list view to open the subscriber's services dashboard.
5. View or update the relevant account details or service. One or more of the following may be available:

MS 365	Microsoft user details. You can update the **Usage Location** field.
MS Licenses	View existing licenses, and add new licenses.
MS Teams	MS Teams user details, including MS Teams provisioning status. You can enable/disable hosted voicemail and enterprise voice, select a different line URI extension, update policies, and select a tenant dial plan.
Local user	View the subscriber's local user details, such as user name, title, and email address.
Exchange	Assign access permissions for this subscriber's mailbox, and assign permissions for the calendar associated with this mailbox. See also, Microsoft Exchange in the Core User Guide. This service is editable only when Microsoft Exchange is enabled for your system. Microsoft Exchange mailboxes cannot be added or deleted from the Business Admin Portal.

Add a Subscriber

To add a subscriber in the Business Admin Portal:

1. Log in to the Business Admin Portal.
2. Choose the hierarchy, for example, provider or site.
3. Click **Subscribers** in the left menu to open the **Subscribers** landing page.
4. In the **Quick Actions**, click **Add Subscriber**.
5. On the **Add Subscribers** page, fill out the new subscribers's details:
    - Choose a user.
    - Fill out the subscriber's first name and last name.
    - Fill out the subscriber's email address and mobile number.
    - Add a password and pin.
    - Define whether to assign the next available line.
    - Choose a profile.

      The subscriber profile defines the services that may be assigned to this subscriber. You won't be able to add this subscriber if the profile you choose has no services enabled.

Note: Only a system-level administrator can delete the default subscriber profile (if available).

- Click **Save**.

Note: The **Services** panel displays services assigned to the subscriber via the profile.

- By default, service names are auto-generated (based on the username). To override the phone name and line details, clear the relevant checkboxes, and manually update the details.
- When editing a subscriber, **New Services** does not display already assigned services, or services where the necessary servers aren't set up.

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
- Business Admin Portal Profiles
- Microsoft Exchange in the Core Feature Guide
- Move Subscriber in the Core Feature Guide

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 Automate platform. For example, to use both Microsoft meeting and collaboration tools and Cisco tools.

Single or Multi Vendor Subscribers

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

Single or Multi Vendor	Description
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.

View Multi Vendor Subscribers (Lists)

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	View subscribers from (default menu):
	• Subscribers menu
	• Home page
	  – Subscribers service card
	  – Quick Actions link (View Subscribers)
	
	Important: Multi vendor subscriber must be enabled (via the **Subscribers** tab in the Business Admin Portal profile).

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 and Manage 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

A customer administrator (or higher) can 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, for example, on a different Unified CM cluster and CUCxn cluster.

This is done using (default menus **Subscriber Management > Move Subscriber**).

Subscriber Configuration

- When moving a subscriber, the subscriber, phones, device profiles, SNR, voicemail, and VOSS Automate 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 Automate**. 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 Automate subscriber is purged. The user is removed from the `device/cucm/User` model of the source Unified CM in VOSS Automate. 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`	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. A user role associated with the `default` profile: • 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: – Site management – Tools • Has view access (read-only) to data from other Business Admin Portal menus, including example model counts and charts.
`Read Only`	The profile applied by default to all operator administrator user roles, with the same permissions as the `default` profile: • No access to the following Business Admin Portal menus: – Site management – Tools • Read-only access (view) to data from other Business Admin Portal menus, including example model counts and charts.
`Full Access`	This profile is applied by default to the provider admin role for new installations. User roles assigned with this profile have have full access to all Business Admin Portal menus and features.
`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 Automate 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 Automate GUI only), go to (default menus) **Role Management > Menu Layouts** and select custom component `list-mv-subscribers`.

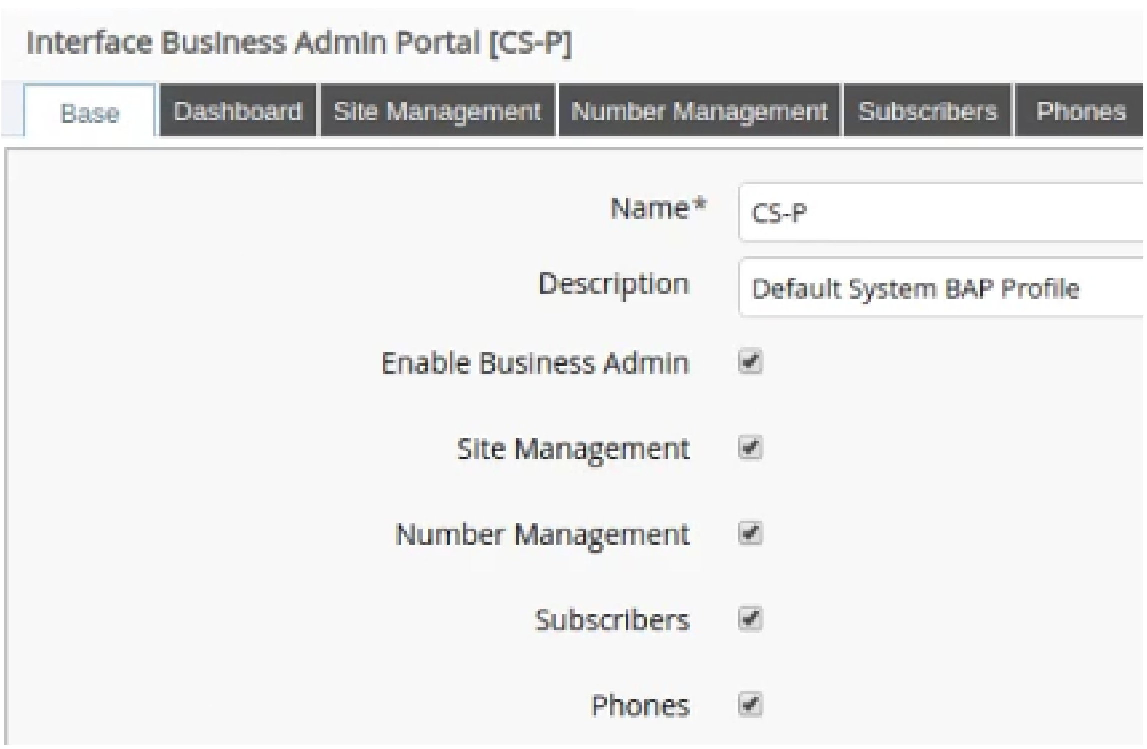
Add a Business Admin Portal Profile

This procedure adds a new Business Admin Portal profile.

Perform these steps:

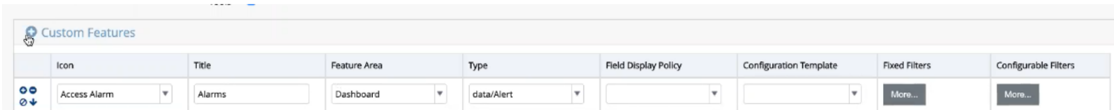
1. Log in to the Admin Portal as a provider administrator (or higher).
2. Go to (default menu) **Customizations > Business Admin Portal Profiles**.
3. Click on an existing Business Admin Portal profile to open its editing screen:
   - If you're using the VOSS Automate legacy Admin GUI, click **Actions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

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

   1. Define a new name, and a description.
   2. Select **Enable Business Admin** to display the **Dashboard** tab.
   3. 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.

    4. To add custom features to the Quick Actions card for a feature, click the Plus icon (+) in **Custom Features**; then, configure the custom feature:



    5. Select an icon and an icon title.
    6. From the **Feature Area** drop-down, select the feature, for example, Extension Mobility, or Phones.
    7. 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.

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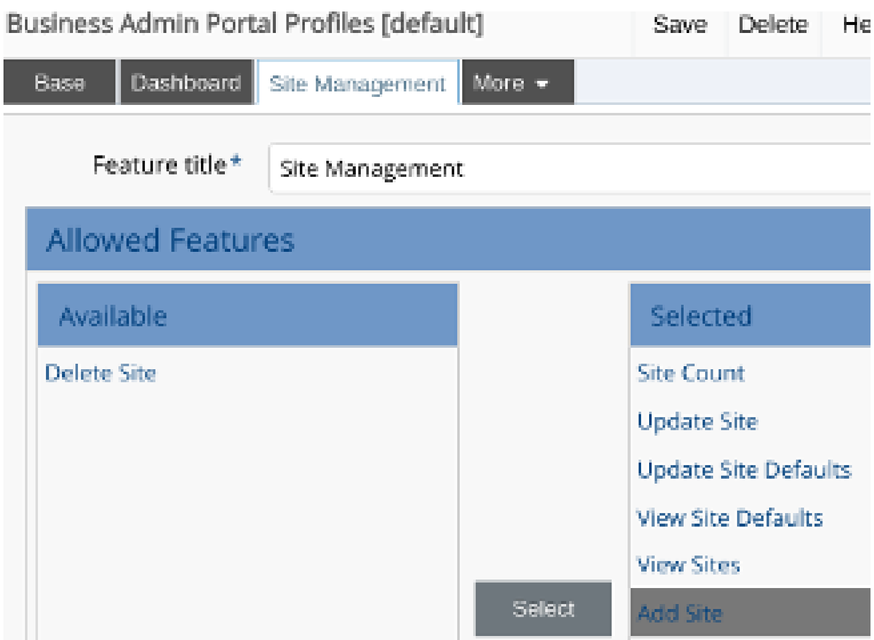
    8. Choose a field display policy, and a configuration template.
    9. Click **OK**.

5. Configure options on the **Dashboard** tab of the Business Admin Portal profile:
    1. Enter a title for the dashboard.
    2. 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.
    3. 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:
    1. In **Display About Information**, define whether to show or hide the **Settings > About** menu.

2. To display the **Export** action on the lists and forms, enable **Allow Data Export**; else, clear the field (disable).

3. 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).

4. 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 Automate 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 Automate 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

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Perform these steps:

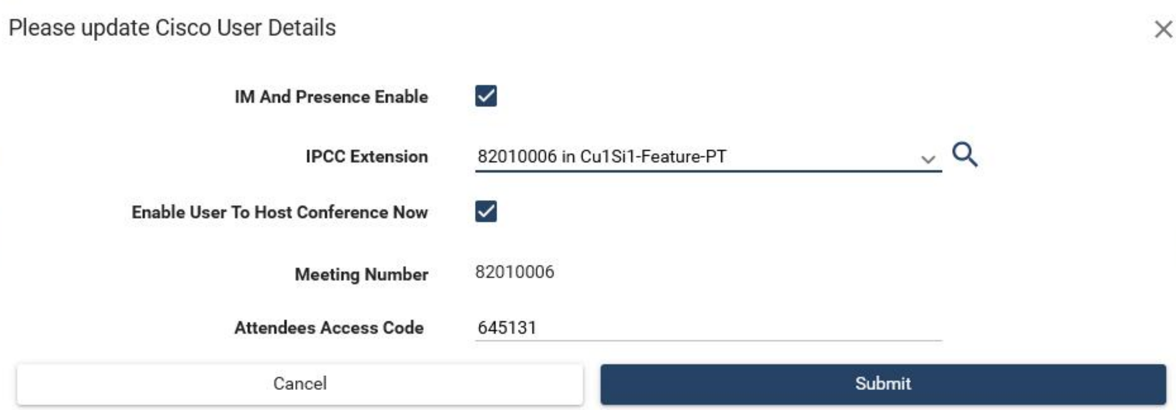
1. Log in to the Business Admin Portal.
2. In the left menu, click (default menu) **Subscribers** to open the Subscribers landing page.
3. Click **View All Subscribers** to open the Subscribers list.
4. Locate the relevant user; then, click in the row to open the Subscribers[subscriber name] dashboard.
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.



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

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

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

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

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

VOSS Automate 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 Automate allows administrators to manage Agents and related configuration from a single pane of glass.

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

As a part of Contact Center management, VOSS Automate 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 Automate.
- 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 Automate 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.

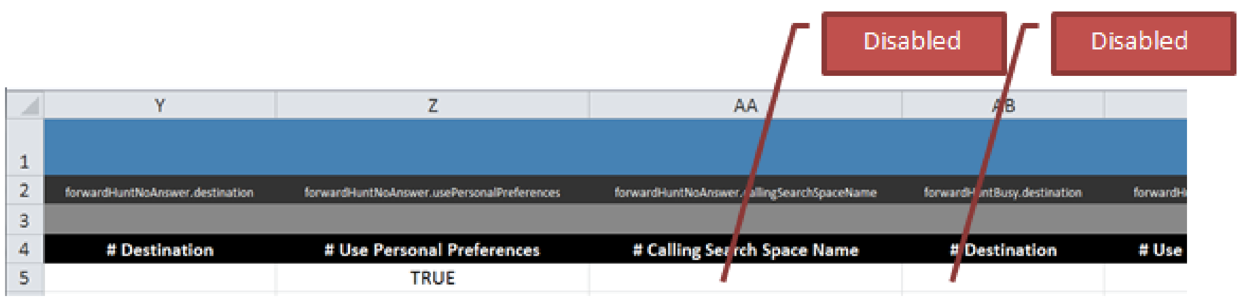
  These fields may not be exposed in the user interface or may, for some resources, be exposed as read-only in the user interface. Such fields are currently exposed as mandatory fields in the generated bulk load templates. The fields and the specific conventions that are used in the template to link the 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.



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

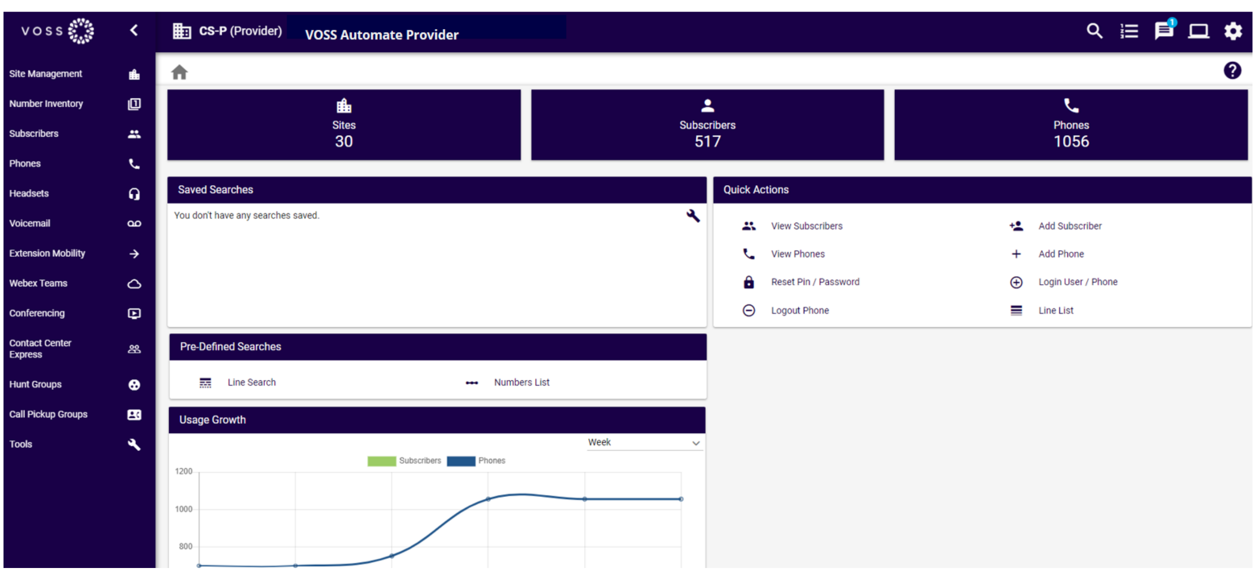
The Business Administration Portal (BAP) interface menus and functionality is defined as an interface type in VOSS Automate, along with the required role-based access.

Note: The menus, features, and functionality described in this topic is based on the default interface type shipped with the VOSS Automate 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)



Toolbar

The table describes options on the Business Admin Portal toolbar:

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

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.

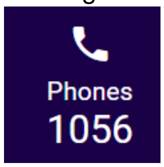
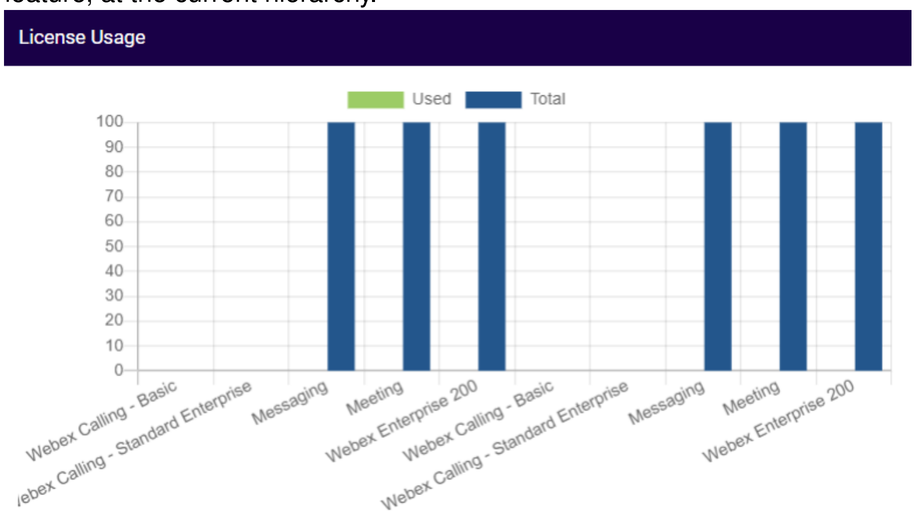
Selecting a menu item opens the landing page for the option you choose. The default menus are as follows:

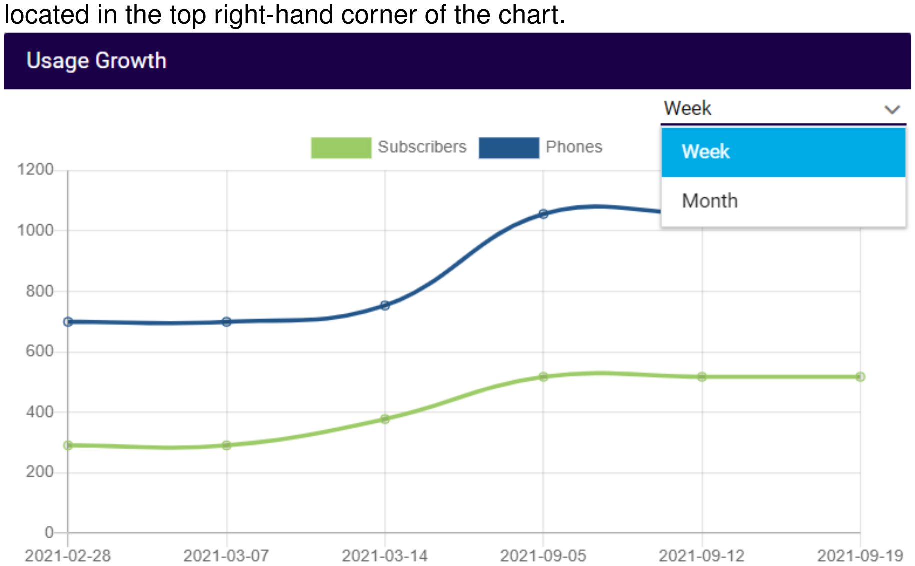
- Site Management (sites and site defaults)
- Number Inventory (lines, and internal and external numbers, including number associations)
- Subscribers
- Phones
- Voicemail
- Extension Mobility
- Webex Teams (Webex Teams, users and licenses)
- Conferencing
- Contact Center Express (Contact Center agents,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

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:

<table>
<tr><td>Counters</td><td>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.

</td></tr>
<tr><td>Quick Actions</td><td>Links to the screens for viewing and managing a feature or service.
Some quick action links, such as Delete, launch just a pop-up. If available, the View links (for example, view sites, view internal inventory) open the list views, allowing you to view and manage these items from the lists.</td></tr>
<tr><td>Graphs and charts</td><td>Visual display of data (if available), providing a quick view of metrics for the feature or service, for example, license usage information for the Webex teams feature, at the current hierarchy.


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

</td></tr>
</table>

Home page

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

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

Related topics

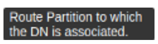
- *User Interface Controls*
- *Lists* (working in the lists)

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.

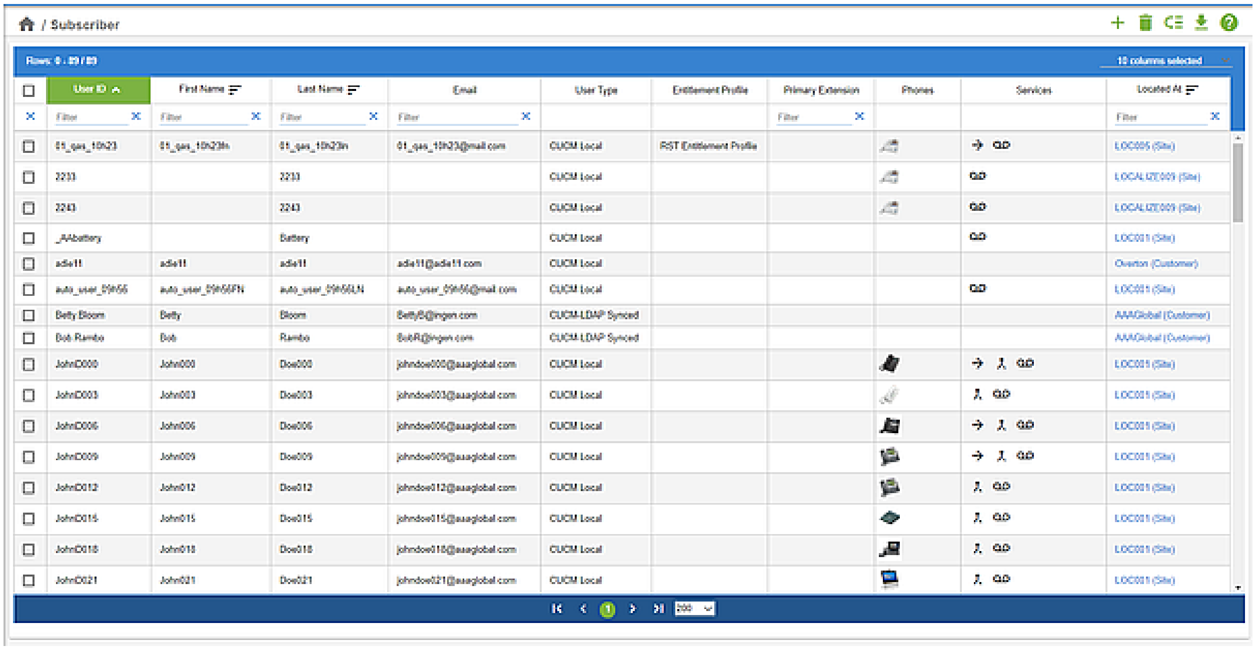
Icon	Description
	Filter. Filter lists and transactions.
	My Transactions. Only show current user transactions.
	Replay. Located on some transaction detail views to replay the transaction.
	Edit and Replay. Located on some transaction detail views to open the transaction edit form and then to replay 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

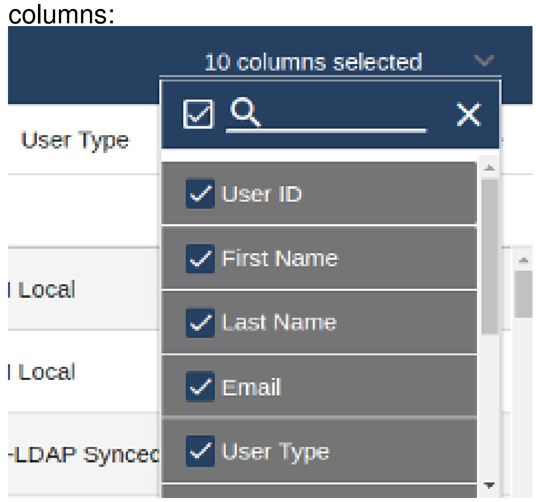
Organization Level and Controls

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.



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

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

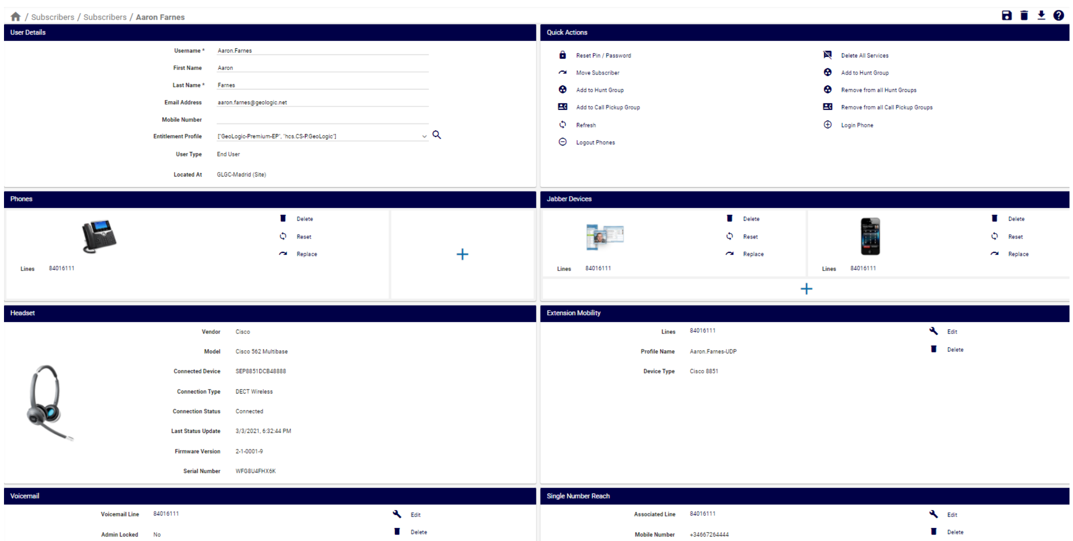
Component	Description
View and sort lists	• List headers display the number of displayed rows (out of total rows), and provides *n columns selected* control to show/hide columns:  • Selected columns are retained for your profile (also between sessions) • Columns can be resized by dragging the column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

6.1.4. Dashboards

In the Business Admin Portal list views, clicking on an entry in a list view 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 (FDP) applied to your role.

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

- User Details
- Quick Actions
- Phones
- Jabber devices
- Headset
- Extension Mobility
- Voicemail
- Single Number Reach

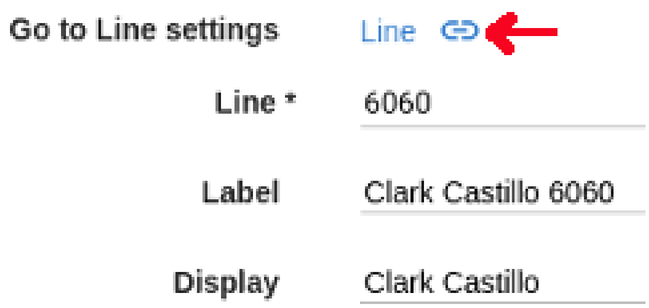


The number and type of panels displayed on the dashboard depends on the services and functionality enabled for your system. For example, vendor-specific services such as Microsoft Teams, or Cisco WebEx. Also, device dashboards include a **Generate PRT** link for creating and collecting the Problem Report Tool (PRT) file that is uploaded at the Customer support upload URL.

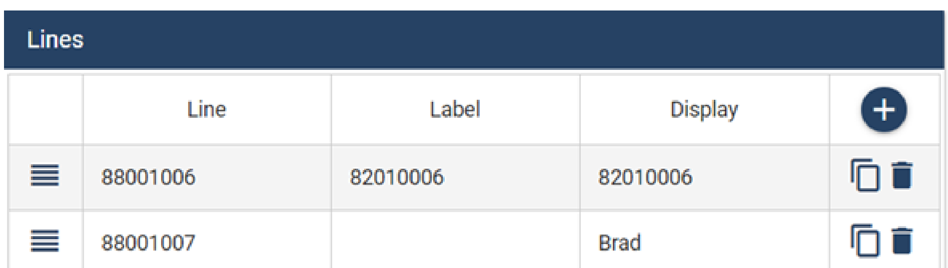
View and Edit Content in the Dashboards

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.



- 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.



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

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:

Component	Description
Counters	Cards displaying the total number of subscribers and/or users, and services (e.g, phones, voicemails, etc.) at the hierarchy. Note: • When multi-vendor is *enabled* in the applied Business Admin Portal profile, the counter displays only total number of subscribers. • When multi-vendor is *disabled* in the applied Business Admin Portal profile, the counter displays a total for subscribers and users. Click on a card to open the list view for the service or resource.
Quick Actions	Links to frequently used services and actions, defined by your administrator. Examples: • **View All Subscribers** Opens a summary list view of all subscribers at the current hierarchy. Click in a row in the list view to open a subscriber's dashboard, where you can view and edit the subscriber and their services. • **Add Subscriber** Opens the **Add Subscriber** page, where you can add details for a new subscriber. • **Bulk Add Subscribers** Opens the **Bulk Add Subscriber** page, where you can add a number of subscribers at once. For each user you must provide: user ID, first name, last name, email address, mobile number, and subscriber profile (to determine the services available during bulk add). Values are automatically generated for the following: – Phone name (generated format is: `BAT<random number>`) (Cisco) – Line (assigned as the next available and unused number, from the internal number inventory. Use next available line = True • **Move Subscriber** Opens the **Move Subscriber** page, which allows a customer admin (or higher) to move a subscriber to another part of the hierarchy (organization). See *Move Subscriber*. • **Subscriber Profiles** Opens the **Subscriber Profiles** page, where you can view a list of subscriber profiles, including name, description, location. See Subscriber Profiles in the Core Feature Guide.

Related Topics

- View and Manage 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** dashboard provides an overview of the resources and actions available at the current hierarchy level.

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

Add a Phone

To add a phone in the Business Admin Portal:

1. Log in to the Business Admin Portal.
2. Choose the site.
3. Click **Phones** in the left-side menu to open the **Phones** dashboard.
4. Add a phone, via either of the following methods:
   - In **Quick Actions**, click **Add Phone** to open the **Phones**/**Add Phone** page.
   - Click in the **Phones** counter to open the list view. From the list view, click the toolbar Plus icon (+)
5. Choose the relevant site (where you want to add the phone).
6. In **Phone Details**:
   - Choose a device type. Available options are determined by the phone template.
   - Add a description for the phone (if required).

Note: This text overrides the description in the phone template, or can be combined with phone template data using a macro in the template. Description values could for example include the phone extension.

- Add a phone name.

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

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

- Choose a phone template.

Note: The phone template configures the phone settings. It defines available phone types and associated default settings when adding a phone.

Additional custom settings are populated using configuration template values. If you don't choose an option, the default applies.

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

- If this phone will not be associated with a subscriber, select **Standalone Phone**. Clear the checkbox to select a username.

7. In **Lines**:

   a. Click the Plus sign to open the Lines dialog. Fill out line details:

      - Choose a line template to apply device attributes from values in the site defaults.
      - Choose an inventory filter, for example, to show only unused numbers with associated E164s, or to show only used numbers.
      - Choose a directory number. Numbers are filtered based on the inventory filter.
      - Specify a label and a display value for the line. By default, this is the directory number.

   b. Click **OK**.

8. Save your changes.

Related Topics

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

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 Automate, 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** dashboard in the Business Admin Portal provides an overview of the resources and actions related to voicemail at the current hierarchy:

- A counter indicating the total number of voicemail boxes at the current hierarchy.
- A Quick Actions panel, with a links to open the list of voicemail boxes, or to add a new voicemail box.

To view or update a voicemail box:

1. Log in to the Business Admin Portal.
2. Choose the hierarchy, for example, provider level, or a customer or site.

3. Select the **Voicemail** menu to open its dashboard.
4. Open the list of voicemail boxes; either click **Voicemail Boxes** in the counter, or in **Quick Actions**, click **View Voicemail Boxes**.
5. View the list of all voicemail boxes at the hierarchy.
6. Click on a voicemail box to open its settings.
7. On the **Voicemail [name]** page, you can view, update, delete, or export voicemail settings. box.

   One or more of the following voicemail settings can be updated:

   - Voicemail box settings
   - Unified messaging account
   - Credentials
   - Alternate extensions
   - Message actions
   - Email notification devices
   - Pager notification devices
   - Phone notification devices
   - SMS notification devices
   - HTML notification devices
   - Caller input details
8. Save your changes.

6.2.7. Extension Mobility

The **Extension Mobility** dashboard provides an overview of the services and resources available at the hierarchy (Site, Customer, or Provider):

- A counter indicates the number of extension mobility profiles at the selected hierarchy.
- A Quick Actions card providing links to frequently used actions and resources for extension mobility profiles, for example, to view the list of all extension mobility profiles, or to add an extension mobility profile.
  - **View Extension Mobility Profiles** - a list view showing all extension mobility profiles located at the selected hierarchy.
  - **Add Extension Mobility Profile** - add an extension mobility from the dashboard, or from the list view.

Related Topics

- Administrator User Interface in the Business Admin Portal Guide
- Configure Extension Mobility Profile in the Core Feature 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 a Quick Actions panel with links to the following functionality:

- Transaction Log

  View the transaction log, and inspect the details of specific transactions.
- Bulk Load
  - *Bulk Load Sheets*
  - *Bulk Loading a File*

  - *Bulk Load Limitations*

- Themes

  In Themes you can view and update existing themes, and add new themes for customizing the look and feel of the interface at a selected hierarchy. For more information about themes, see *Introduction to Themes* in the Core Feature Guide.

  On the Themes page you can:

  - Add or update a theme name and description
  - Specify a site title for a theme, and navigation bar text
  - Apply the theme for the interface to the Login page
  - Customize colors, and the logo image, and preview your changes

Jan 14, 2022

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