



BT One Cloud Cisco Self Service (OCC)

Add a new user

Physical and soft device, multiple lines,
Self-care Access, Single Number Reach with,
Extension Mobility with voicemail

User guide

Administrator

There are six main steps to complete when creating a new local user in OCC Self Service Portal.

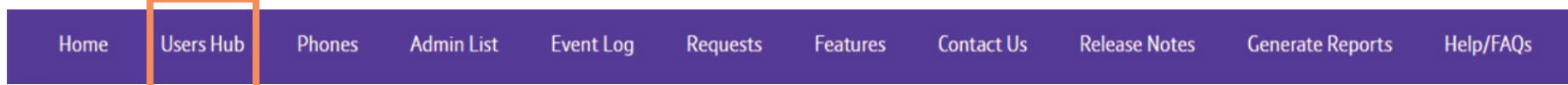
This guide will show you how to:

- Create a user
- Add the devices and service types: physical device, and Jabber for Windows, multiple lines, Self-Care ccess
- Add an Extension Mobility Profile, Single Number Reach with voicemail



Get started | Create a new user

Select and open the **Users Hub** to then, **select Add New User**.



Users Hub

Unassigned users Unassigned users list

Division: Site:

Bulk loader Add new user

Search for a user

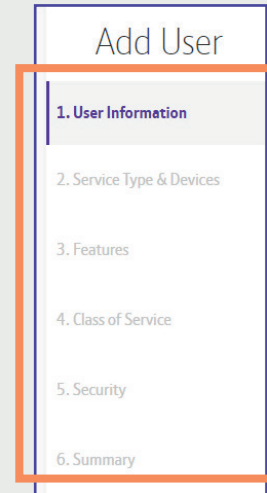
Search

Name	Login	Email	Service Type	Actions
> Scot Noel	100010	scotnoel@test.com	COLLABORATE	
> Ben Parkes	605435009	605435009@bt.com	ANYWHERE	
> Ali Jaffry	609439461		undefined	
> David Hodges	802919822	802919822@bt.com	ANYWHERE	
> BTD_ADASTRAL	80247802	80247802@bt.com	ANYWHERE	
> wireless phone	80247832_1	80247832@bt.com	COLLABORATE	



Step 1 | Create a user

Here are the **6 steps** which need to be complete in order.



To start, you'll have to complete the **User Information** fields.

Select the **Division** and **Site** this user is associated to. Then, **enter** the **name** and **create a unique username**. (It can be letters and numbers).
**You'll get a green tick when the system has verified this username is available.*

Also, **add** their **email address** to the system.

Add User

1. User Information ✓

2. Service Type & Devices

3. Features

4. Class of Service

5. Security

6. Summary

Configure User Information

Division: BT TRAINING ONLY

Site: BTD_861_STOCKPORT (Site location code: 861)

First Name: Anne

Last Name*: Dixon

Username* ✓: AnneDixon

Email* ✓: anne.dixon@bt.com

Self-care / Access

The system will check the availability of the username and the format of the email address which you'll get a green tick once it's confirmed.



The **Self-care Access** enables the end user to access a self-service portal where they can manage certain settings and services for their own OCC devices.

When switched on a password will be sent to the email entered here.

If you would like to give this access to your user, then switch it on.

The screenshot shows the 'Add User' form with the following details:

- 1. User Information** (checked)
- 2. Service Type & Devices**
- 3. Features**
- 4. Class of Service**
- 5. Security**
- 6. Summary**

Configure User Information

- Division:** BT TRAINING ONLY
- Site:** BTD_861_STOCKPORT (Site location code: 861)
- First Name:** Anne
- Last Name*:** Dixon
- Username*:** AnneDixon
- Email*:** anne.dixon@bt.com
- Self-care Access:** (highlighted in orange)

Select Next to confirm your changes

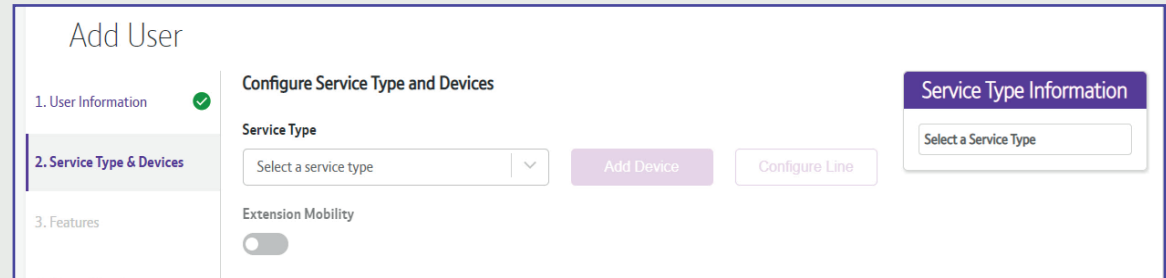
The screenshot shows three buttons: Cancel, Save Draft, and Next. The Next button is highlighted with an orange border.



Step 2| Add Service Type and Devices

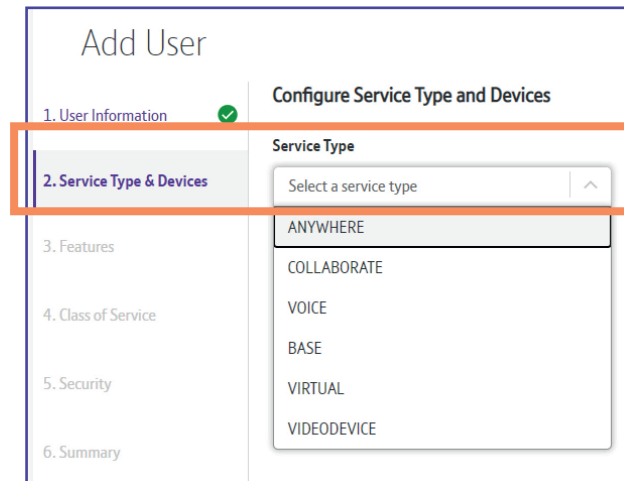
This is where you set up the service type and device.

There are several different service types and the devices available will be determined by the service type you select.



The screenshot shows the 'Add User' configuration interface. On the left, a sidebar lists steps: '1. User Information' (checked), '2. Service Type & Devices' (active), and '3. Features'. The main area is titled 'Configure Service Type and Devices'. It contains a 'Service Type' dropdown menu with the text 'Select a service type', an 'Add Device' button, and a 'Configure Line' button. Below this is an 'Extension Mobility' toggle switch. On the right, a 'Service Type Information' box contains a 'Select a Service Type' dropdown.

Select the **Service Type** from the drop down menu.



This screenshot shows the 'Add User' configuration page with the 'Service Type' dropdown menu open. The dropdown list includes the following options: ANYWHERE, COLLABORATE, VOICE, BASE, VIRTUAL, and VIDEODEVICE. The '2. Service Type & Devices' step in the sidebar is highlighted with an orange box.



Extension Mobility is switched on as a standard with the **ANYWHERE** service type.

1. User Information

2. Service Type & Devices

3. Features

4. Class of Service

5. Security

6. Summary

Configure Service Type and Devices

Service Type: ANYWHERE

Add Device

Configure Line

Extension Mobility

When Extension Mobility is enabled, you need to add an Extension Mobility Profile to continue.

Service Type Information

Selected Service Type: ANYWHERE

Devices

Total Allowed: 10 Devices

1 Physical Device and 9 Soft Devices OR 10 Soft Devices

Available Features

Cisco Voicemail

Extension Mobility

Single Number Reach

Features Not Included

MS Teams Enterprise Voice

With an Extension Mobility Profile the users will be able to log in at another location with similar phone ranges and use their telephone number settings.

As you go through these steps, you'll see a **summary** on the right-hand side.

It also highlights the available and **Features** not included for this service type.

** this may incur a charge*

Now **select Add Device**.

1. User Information

2. Service Type & Devices

3. Features

4. Class of Service

Configure Service Type and Devices

Service Type: BASE

Add Device

Extension Mobility

Select Add Physical Device.

To add a Device, select a Type

Add Physical Device

Add Soft Device: Jabber

Add Extension Mobility Profile

Copy Extension Mobility from Primary

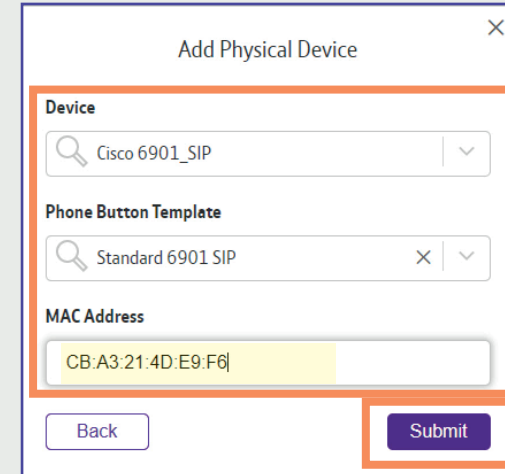


Select **Device Type** from the drop down menu.

Select and choose the **Phone Button Template**

Then, **enter** the **MAC Address** of the phone.
(You will find this at the back and the bottom of the phone)

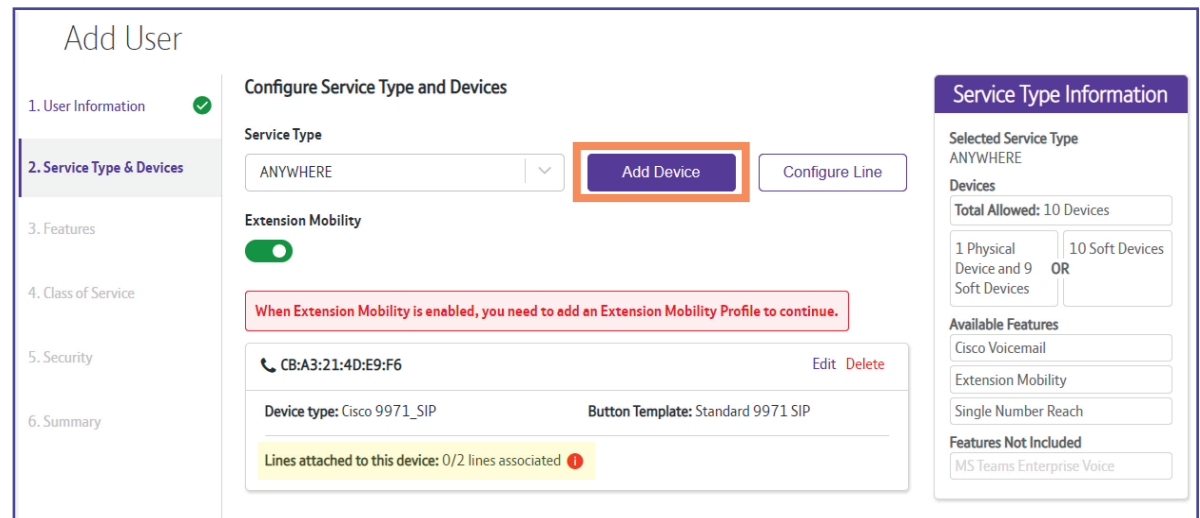
Select **Submit** to confirm your changes.



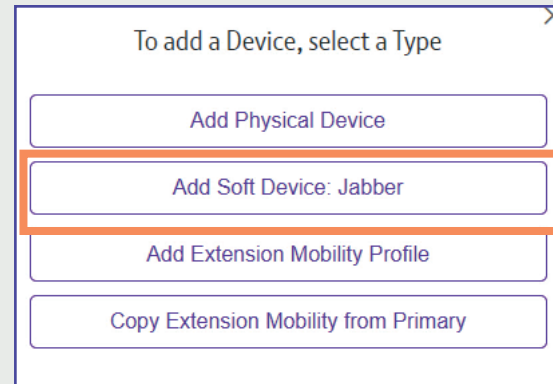
The device has been added and it shows that 2 lines can be attached.

The **next step** is to add a second device, *Jabber* for Windows (A Soft Device).

Select **Add Device**.



Select Add Soft Device: Jabber



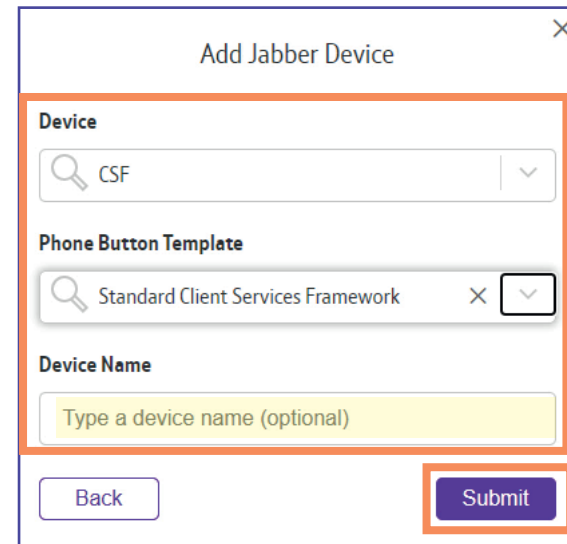
To add a Device, select a Type

- Add Physical Device
- Add Soft Device: Jabber**
- Add Extension Mobility Profile
- Copy Extension Mobility from Primary

For Windows you need to select **CSF** which is *Client Services Framework*, **Select** the **Phone Button Template** as required.

The system will auto generate a device name when the *Device Name field* is left blank, or you can add one of your own.

Select Submit to confirm your changes.



Add Jabber Device

Device

CSF

Phone Button Template

Standard Client Services Framework

Device Name

Type a device name (optional)

Back Submit

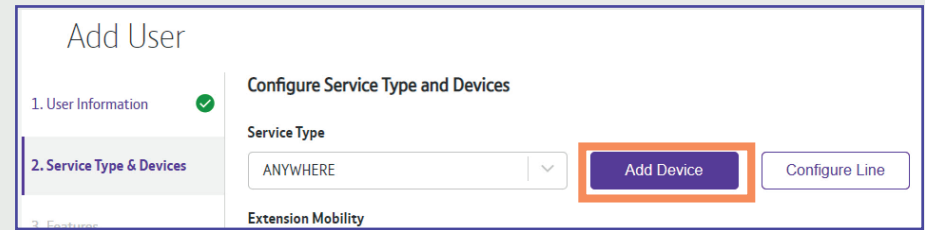


Now **select Add Device** again and **select Copy Extension Mobility from Primary**

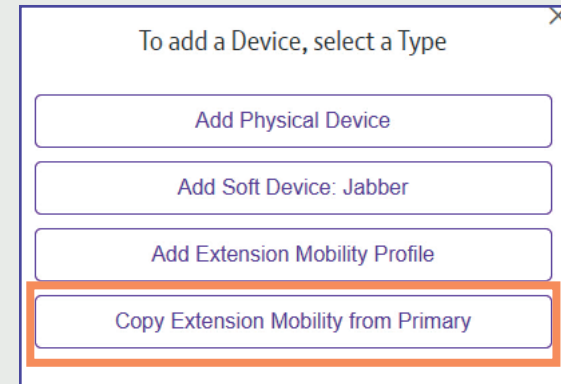
As the Extension Mobility is switched on, an Extension Mobility Profile needs to be set up.

You can either set up the Mobility Profile for a physical device, where you allocate the typical range used as Hot Desks that the user can log in to while in the office or copy from the primary device to retain the same details as the device.

Here we'll **Copy from Primary** which will automatically populate the details.



The screenshot shows the 'Add User' configuration interface. On the left, a sidebar lists steps: 1. User Information (checked), 2. Service Type & Devices (active), and 3. Features. The main area is titled 'Configure Service Type and Devices'. Under 'Service Type', a dropdown menu is set to 'ANYWHERE'. To the right of this dropdown, the 'Add Device' button is highlighted with an orange border. To its right is a 'Configure Line' button. Below the 'Service Type' section, the 'Extension Mobility' section is visible, with a toggle switch turned on.

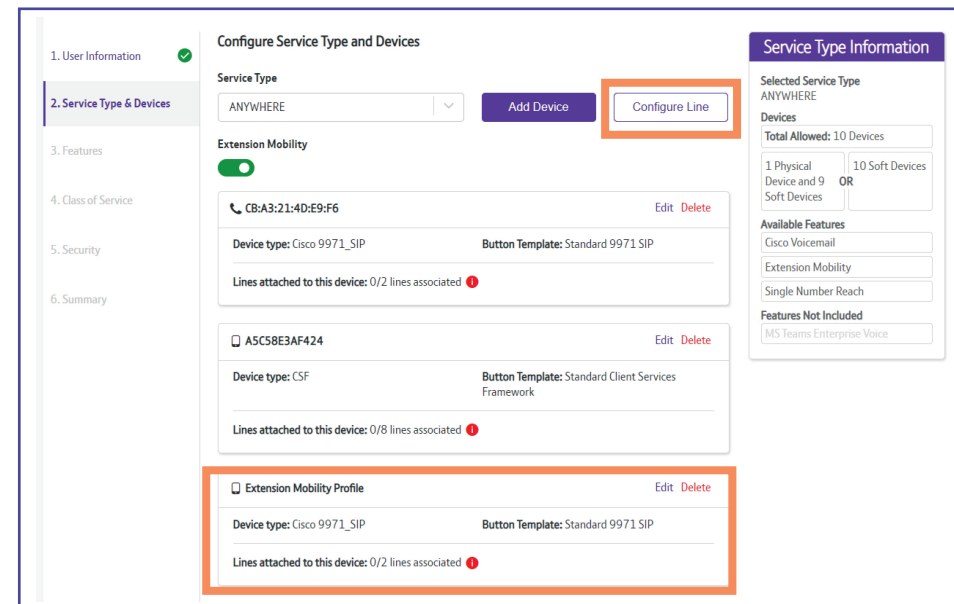


The screenshot shows a modal dialog box with the title 'To add a Device, select a Type'. It contains four buttons stacked vertically: 'Add Physical Device', 'Add Soft Device: Jabber', 'Add Extension Mobility Profile', and 'Copy Extension Mobility from Primary'. The 'Copy Extension Mobility from Primary' button is highlighted with an orange border.

Extension Mobility Profile has been added.

Once all devices and the Mobility Profile have been added, the next step is to Configure the Lines.

Select Configure Line



The screenshot shows the 'Configure Service Type and Devices' page. The 'Service Type' is 'ANYWHERE'. The 'Add Device' button is highlighted with an orange box. The 'Configure Line' button is also highlighted with an orange box. The 'Extension Mobility' toggle is turned on. Below it, there are three device entries. The first entry is 'CB:A3:21:4D:E9:F6' with device type 'Cisco 9971_SIP' and button template 'Standard 9971 SIP'. The second entry is 'A5C58E3AF424' with device type 'CSF' and button template 'Standard Client Services Framework'. The third entry is 'Extension Mobility Profile' with device type 'Cisco 9971_SIP' and button template 'Standard 9971 SIP'. The 'Extension Mobility Profile' entry is highlighted with an orange box. On the right, the 'Service Type Information' panel shows 'Selected Service Type ANYWHERE' and 'Total Allowed: 10 Devices'. The 'Available Features' panel shows 'Cisco Voicemail', 'Extension Mobility', and 'Single Number Reach'. The 'Features Not Included' panel shows 'MS Teams Enterprise Voice'.



Select the required line, then **select Next**.

A public number is their direct line.

Configure Line

Private Number Public Number Free Configured Only

Selected Line: 8612111 / \+441358769111

	Private Number	Public Number	Status	Line Label
<input checked="" type="radio"/>	8612111	\+441358769111	Free	
<input type="radio"/>	8612112	\+441358769112	Free	
<input type="radio"/>	8612113	\+441358769113	Free	
<input type="radio"/>	8612114	\+441358769114	Free	
<input type="radio"/>	8612115	\+441358769115	Free	
<input type="radio"/>	8612120	None	Free	
<input type="radio"/>	8612121	None	Free	
<input type="radio"/>	8612122	None		
<input type="radio"/>	8612123	None		
<input type="radio"/>	8612124	None		
<input type="radio"/>	8612125	None		
<input type="radio"/>	8612126	None		
<input type="radio"/>	8612127	None		
<input type="radio"/>	8612128	None	Free	
<input type="radio"/>	8612129	None	Free	

Cancel Next

You can use the search options to find a specific number, internal only numbers, or a used number for shared lines.

If you give them one without a Public Number, they'll only be able to dial internally.



Select all check boxes.

Configure Line

Attach Line: 8612112 / \+441358769112

- Cisco 9971_SIP - CB:A3:21:4D:E9:F6 (0/2)
- CSF - A5C58E3AF424 (0/8)
- Cisco 9971_SIP - Extension Mobility Profile (0/2)
- Single Number Reach (0/1)
- Voicemail (0/1)

[Back](#) [Submit](#)

Select **Submit** to confirm



You can set the user to be able to answer calls from a used line e.g answer their managers line when it rings.

You do this by configuring a second line and searching for the used number.

Select Configure Line

1. User Information

2. Service Type & Devices

3. Features

4. Class of Service

5. Security

6. Summary

Configure Service Type and Devices

Service Type: ANYWHERE

Extension Mobility:

CB:A3:21:4D:E9:F6

Device type: Cisco 9971_SIP Button Template: Standard 9971 SIP

Lines attached to this device: 0/2 lines associated

ASC58E3AF424

Device type: CSF Button Template: Standard Client Services Framework

Lines attached to this device: 0/8 lines associated

Extension Mobility Profile

Device type: Cisco 9971_SIP Button Template: Standard 9971 SIP

Lines attached to this device: 0/2 lines associated

Service Type Information

Selected Service Type: ANYWHERE

Devices: Total Allowed: 10 Devices

1 Physical Device and 9 Soft Devices OR 10 Soft Devices

Available Features: Cisco Voicemail, Extension Mobility, Single Number Reach

Features Not Included: MS Teams Enterprise Voice

Search for the used number.

Select the used line, then **dselect** Next.

Configure Line

8612110 Public Number Used Configured Only

Selected Line: 8612110 / +441358769110

Private Number	Public Number	Status	Line Label
<input checked="" type="radio"/> 8612110	+441358769110	Used	



Select the device this line is associated with.

Then select Submit.

Configure Line

Attach Line: 8612111 / \+441358769111

Cisco 6901_SIP - CB:A3:21:4D:E9:F6 (0/1)

Back Submit

Now you see that there are **two lines** associated to the user, as well as **Jabber** and the **Extension Mobility Profile**.

Select Next to continue.

Add User

1. User Information

2. Service Type & Devices

3. Features

4. Class of Service

5. Security

6. Summary

Configure Service Type and Devices

Service Type: ANYWHERE

Extension Mobility:

CB:A3:21:4D:E9:F6 Edit Delete

Device type: Cisco 9971_SIP Button Template: Standard 9971 SIP

Lines attached to this device: 2/2 lines associated

8612112 / \+441358769112

8612110 / \+441358769110

A5C58E3AF424 Edit Delete

Device type: CSF Button Template: Standard Client Services Framework

Lines attached to this device: 1/8 lines associated

8612112 / \+441358769112

Extension Mobility Profile Edit Delete

Device type: Cisco 9971_SIP Button Template: Standard 9971 SIP

Lines attached to this device: 1/2 lines associated

8612112 / \+441358769112

Service Type Information

Selected Service Type: ANYWHERE

Devices: Total Allowed: 10 Devices

1 Physical Device and 9 Soft Devices OR 10 Soft Devices

Available Features: Cisco Voicemail, Extension Mobility, Single Number Reach

Features Not Included: MS Teams Enterprise Voice



Step3 | Add the features

Single Number Reach and **Voicemail** are switched on and have lines already associated, this is because they were set up in step 2.

Enter the alternate phone number for the simultaneous device, this is usually a mobile number.

Then, **select** Next.

Add User

- 1. User Information
- 2. Service Type & Devices
- 3. Features**
- 4. Class of Service
- 5. Security
- 6. Summary

Configure Features

Single Number Reach

Phone Number*

Single Number Reach

Lines attached to this device: 1/1 lines associated

Voicemail

Voicemail

Lines attached to this device: 1/1 lines associated

MS Teams Enterprise Voice

Service Type Information

Selected Service Type
ANYWHERE

Devices

Total Allowed: 10 Devices

1 Physical Device and 9 Soft Devices OR 10 Soft Devices

Available Features

Cisco Voicemail

Extension Mobility

Single Number Reach

Features Not Included

MS Teams Enterprise Voice



Step 4. | Class of Service

This is where you associate the appropriate **class of service** or **calling search space** to the line.

This determines the types of calls the user can make and where they're able to dial to. *For example, local calls only, or National and mobile calls.*

The class of service will auto-populate with the site default.

*You can change it by using the drop-down arrow and select a new class of service. An explanation of the calling search spaces is in the **OCC Help section**.*

Select Next to continue.

Add User

1. User Information ✓
2. Service Type & Devices ✓
3. Features ✓
4. Class of Service ✓
5. Security
6. Summary

Configure Class of Service

Search

Search for Lines

8612112 / \+441358769112	Intl24HrsEnh-CSS-21
8612110 / \+441358769110	Intl24HrsEnh-CSS-21

Service Type Information

Selected Service Type
ANYWHERE

Devices

Total Allowed: 10 Devices

1 Physical Device and 9 Soft Devices OR 10 Soft Devices

Available Features

Cisco Voicemail
Extension Mobility
Single Number Reach

Features Not Included

MS Teams Enterprise Voice

Cancel Save Draft Back **Next**



Step 5. | Security

This where you set up the **passwords** and **PINs** for the services you have selected. The options that appear here will be dependent on the services you've selected.

A password is required for the Jabber login and a PIN for the voicemail and extension mobility.

Type in a password of your choice or check **Generate a password** for the system to create one for you.

Enter a **PIN** number.

Add User

1. User Information ✓
2. Service Type & Devices ✓
3. Features ✓
4. Class of Service ✓
5. Security
6. Summary

Configure Security

Avoid recently used passwords/PIN for this subscriber

Enter your password to access self-care and Jabber device.

Create a password

Type Password

Must be at least 8 characters, and must contain at least one:
 uppercase letter lowercase letter number special character

Generate a password
The password will be sent to the subscriber's e-mail

Enter a secure PIN to use for Extension Mobility and Voicemail.

Type Pin

Be at least 4 digits long

And it must NOT contain:

- The primary extension or alternate extensions of the user.
- The reverse of the primary extension or alternate extensions of the user.
- Sequences of repeated numbers e.g. 408408 or 123123.
- Only two different digits e.g. 121212.
- More than two repeated numbers consecutively e.g. 28883.
- Ascending or descending sequence of digits e.g. 012345 or 987654.

Your password must meet the security criteria to proceed.



Step 6. | Summary

With the five steps complete, a full summary of the order will be displayed.

Once you have *checked the summary* and it's correct.

Select Submit User to complete the order.

If need be, you can navigate back to any of the previous steps to make any amendments by selecting the steps on the left hand menu.

Home Users Hub Phones Admin List Event Log Requests Features Contact Us Release Notes Generate Reports Help/FAQs

Add User

1. User Information

2. Service Type & Devices

3. Features

4. Class of Service

5. Security

6. Summary

User's Summary

User information

Full Name Anne Dixon	Username AnneDixon	Email anne.dixon@bt.com
Division BT TRAINING ONLY	Site BTD_861_STOCKPORT	Self-Care Access <input checked="" type="checkbox"/>

Service Profile, Devices and Features

Service Type
ANYWHERE

Devices with lines

Physical Device

Cisco 9971_SIP - (B: A3: 21: 4D: E9: F6)

PBT - Standard 9971 SIP

Lines Associated:
8612112 / \-441358769112
8612110 / \-441358769110

Jabber Device

CSF - A5C58E3AF424

PBT - Standard Client Services Framework

Lines Associated:
8612112 / \-441358769112

Features

Extension Mobility

Cisco 9971_SIP

PBT - Standard 9971 SIP

Line: 8612112 / \-441358769112

Single Number Reach

Phone Number: +07788708

Line: 8612112 / \-441358769112

Voicemail

Line: 8612112 / \-441358769112

MS Teams Enterprise Voice

Class of Service

Int24HrsEnh-CSS-21

Lines Associated:
8612112 / \-441358769112
8612110 / \-441358769110

Security

A confirmation message will appear showing that the order is being actioned.

Select OK to complete the process.

