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

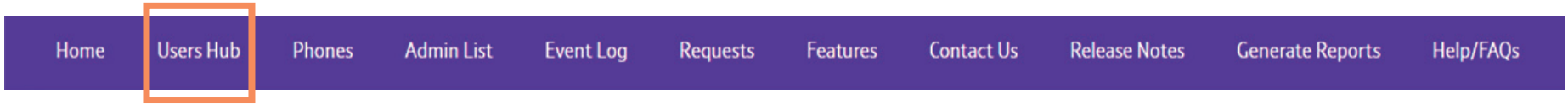
There are six main steps to complete when creating a new local user in OCC Self Service Portal.

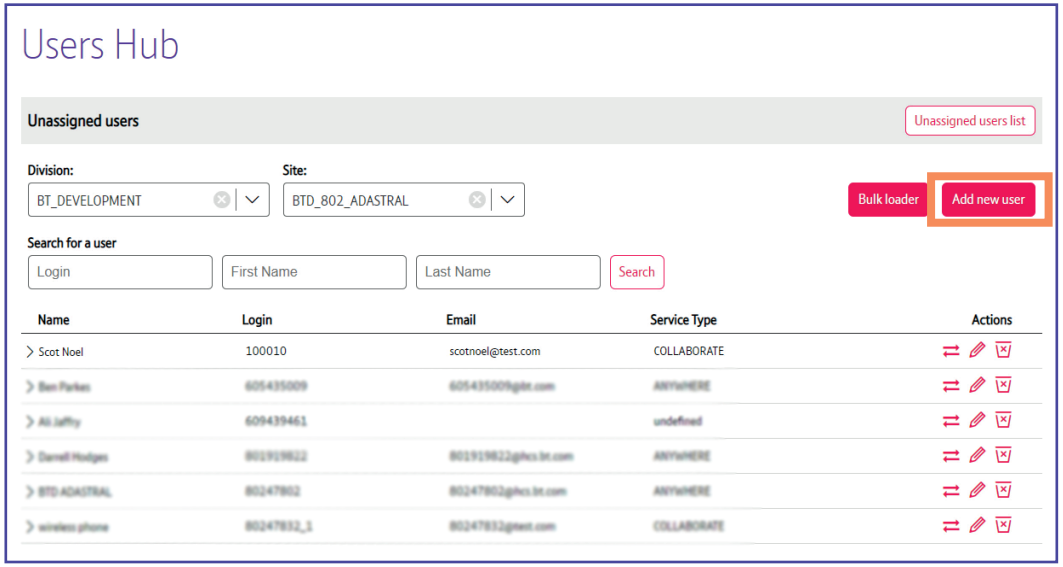
This guide will show you how to:

- 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

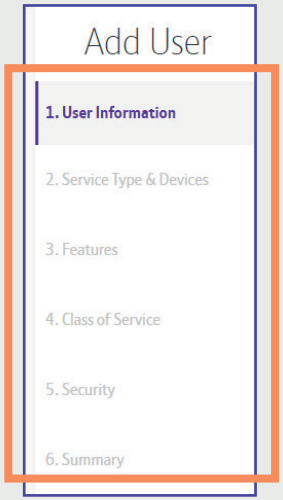
Select and open the **Users Hub** to then, **select Add New User.**





Step 1| Create a user

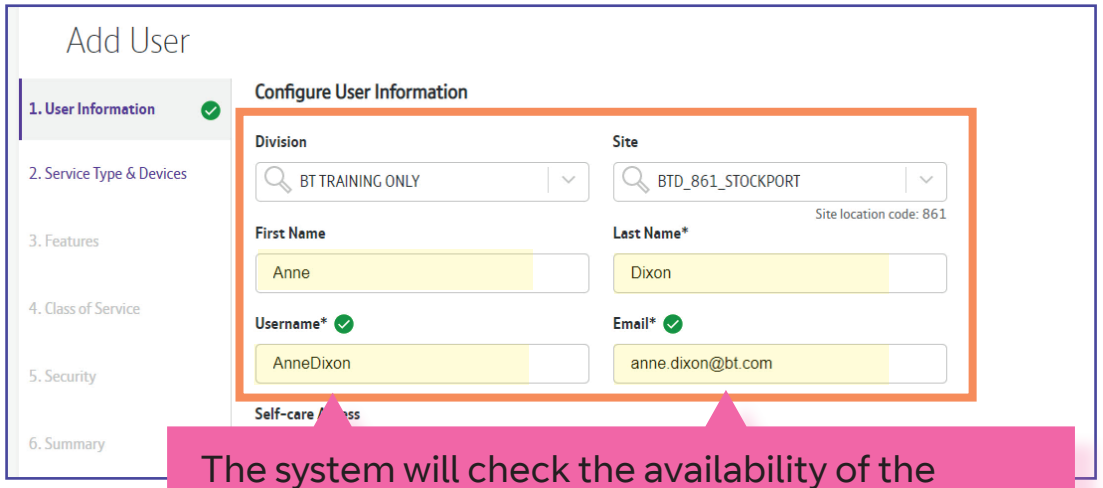
Here are the **6 steps** which need to be complete in order.



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.*

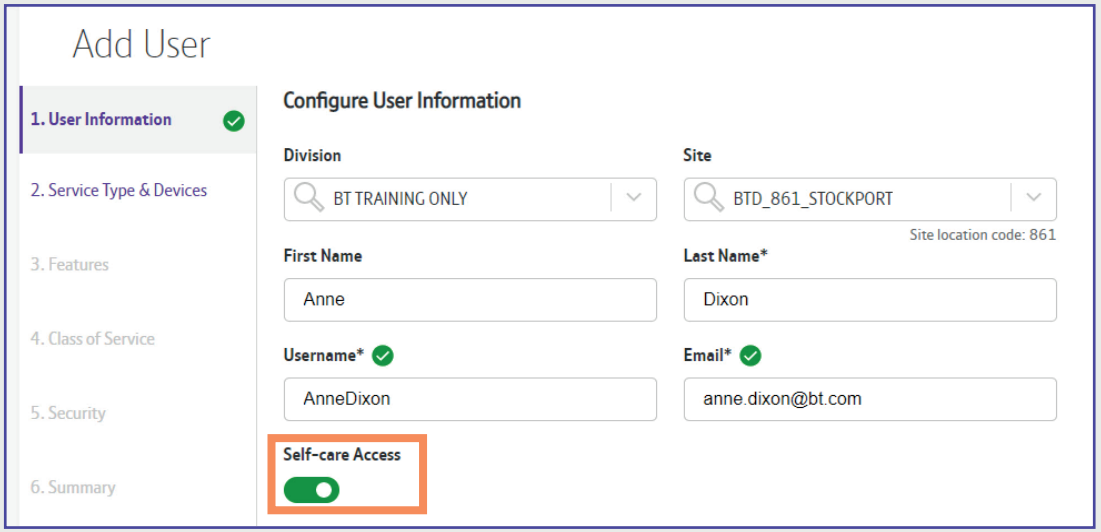
Also, **add** their **email address** to the system.



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.

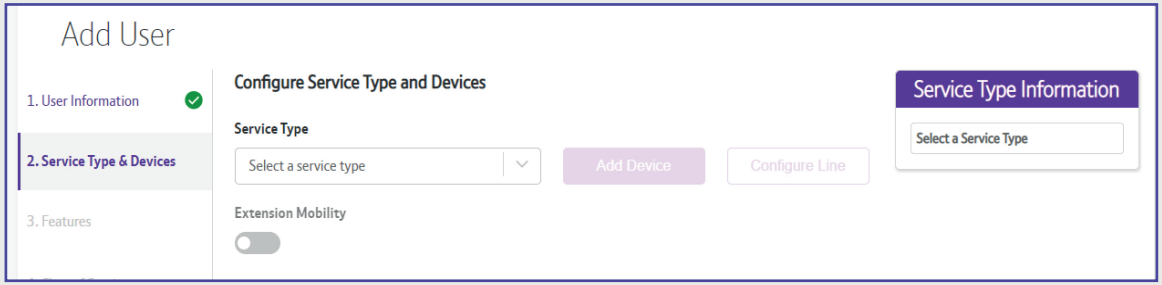


Select Next to confirm your changes

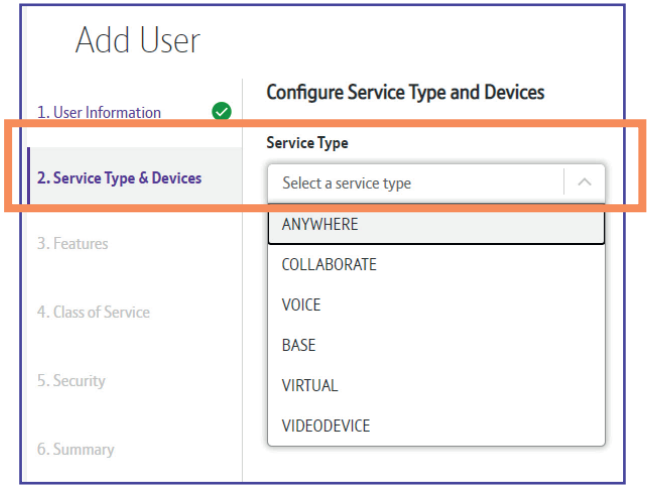
Step 2| Add Service Type and Devices

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

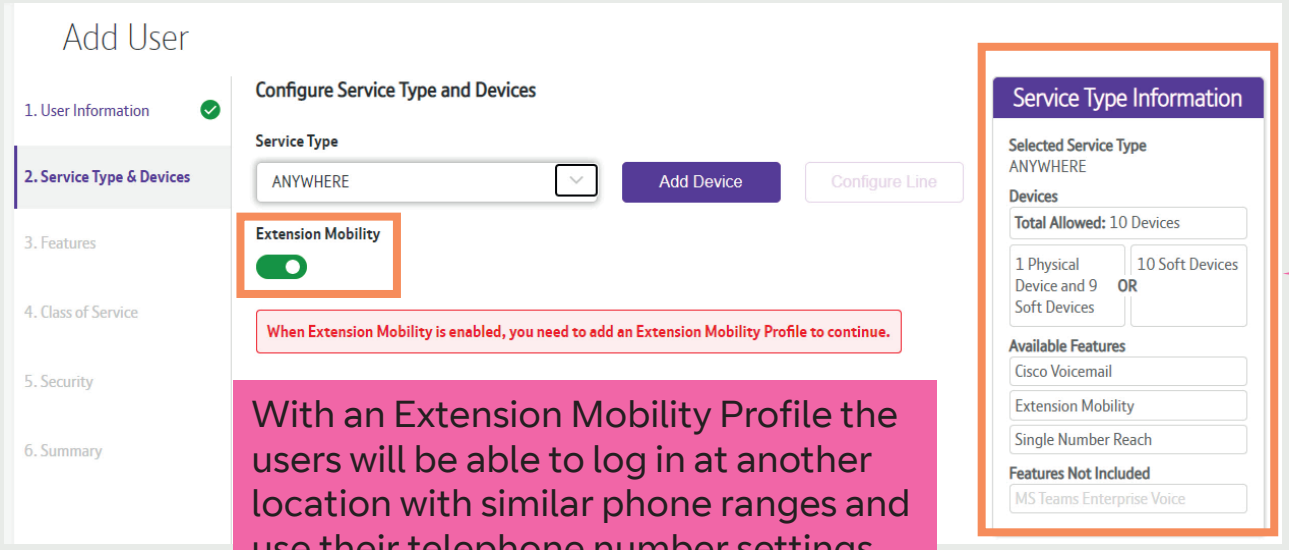
There are several different service types and the devices available will be determined by the service type you select.



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



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



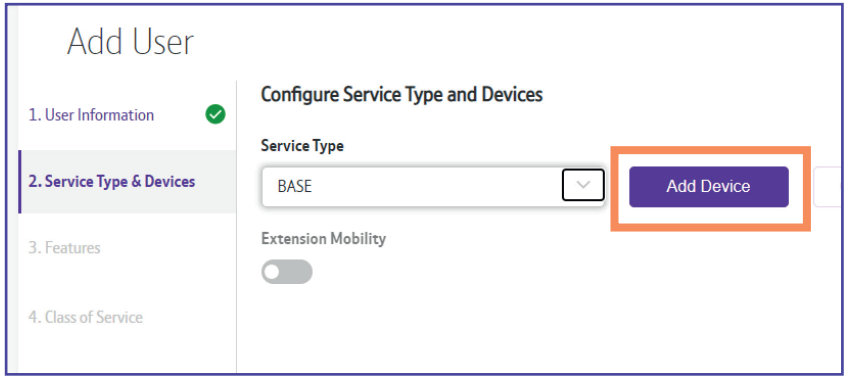
With an Extension Mobility Profile the users will be able to log in at another location with similar phone ranges and use their telephone number settings.

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

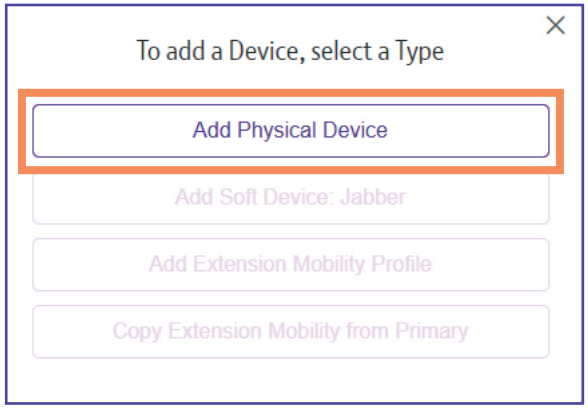
It also highlights the available and **Features** not included for this service type.

** this may incur a charge*

Now **select** **Add Device.**



Select **Add Physical Device.**

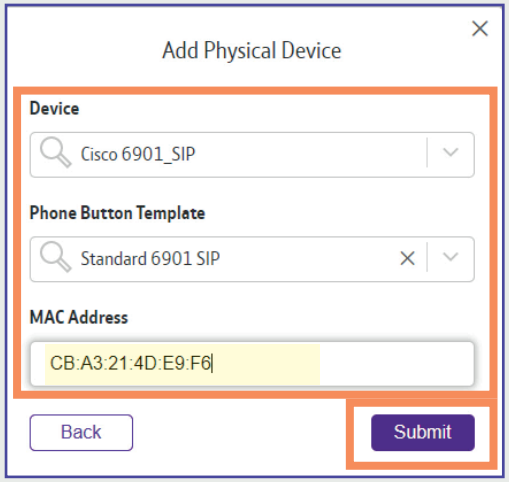


Select Device Type from the drop down menu.

Select and choose the **Phone Button Template**

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

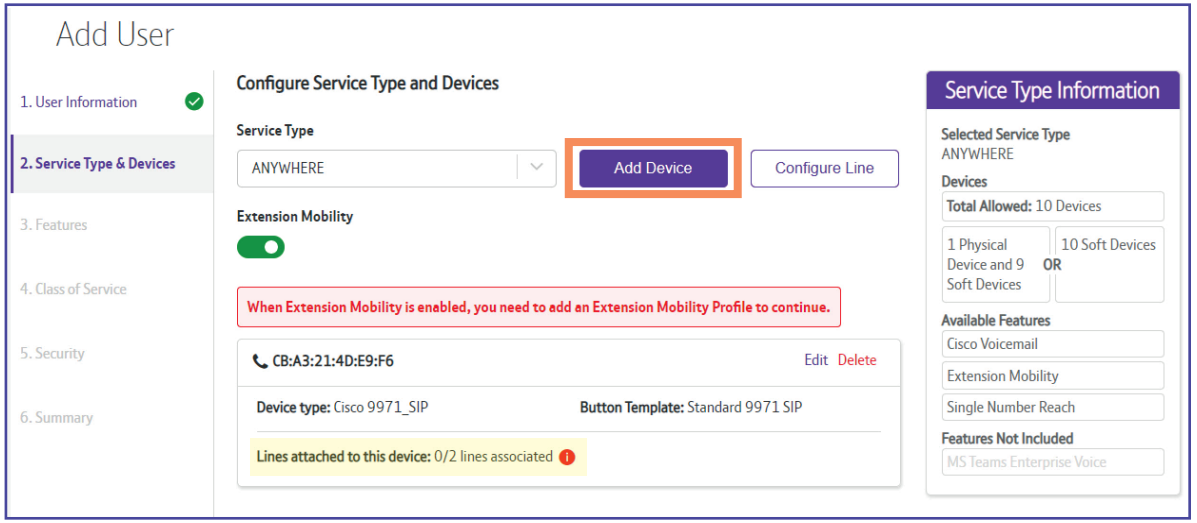
Select Submit to confirm your changes.



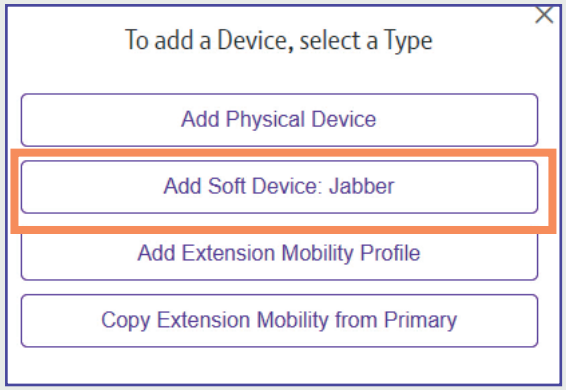
The device has been added and it shows that 2 lines can be attached.

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

Select Add Device.



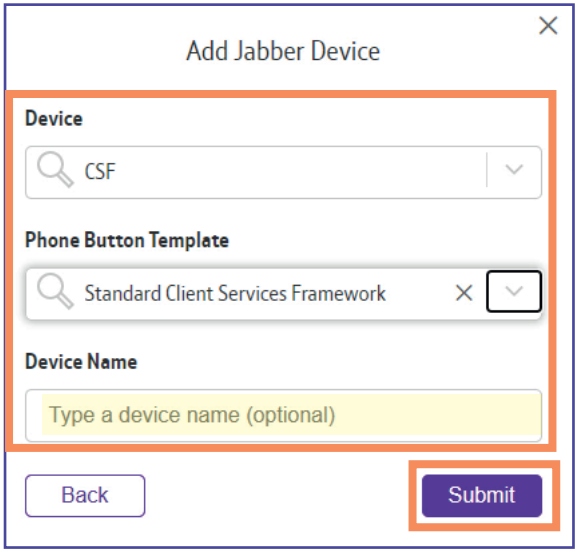
Select Add Soft Device: Jabber



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.

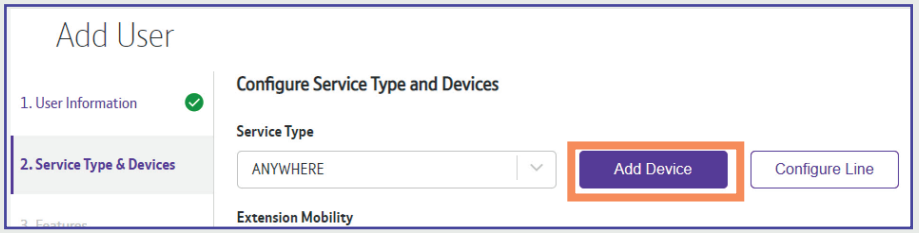


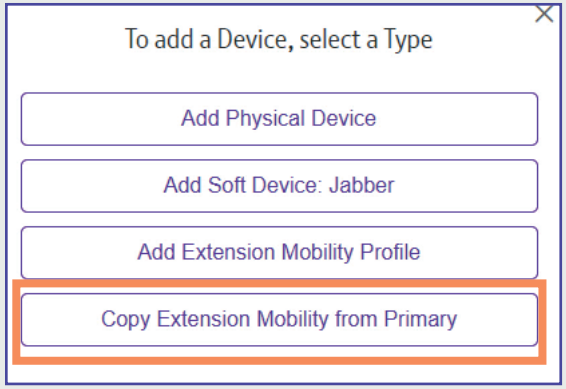
Now **select Add Device** again and **select Copy Extension Mobility from Primary**

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.

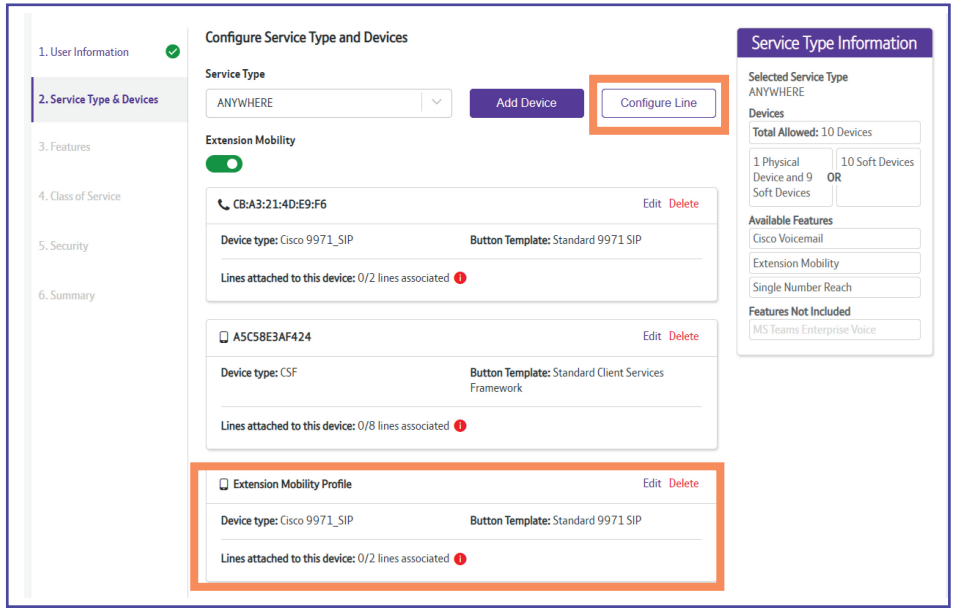




Extension Mobility Profile has been added.

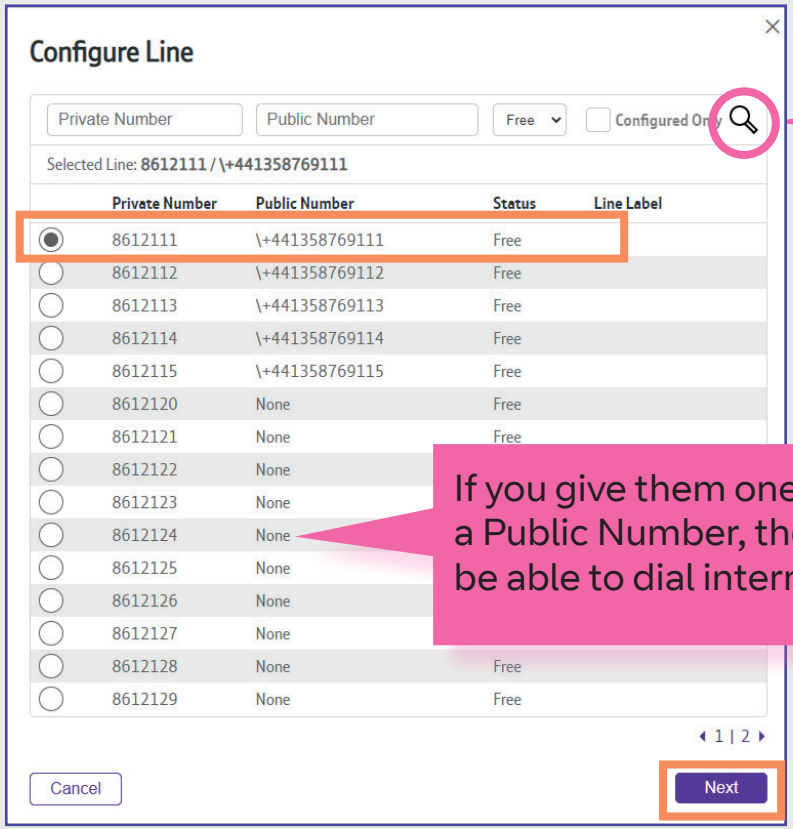
Once all devices and the Mobility Profile have been added, the next step is to Configure the Lines.

Select Configure Line



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

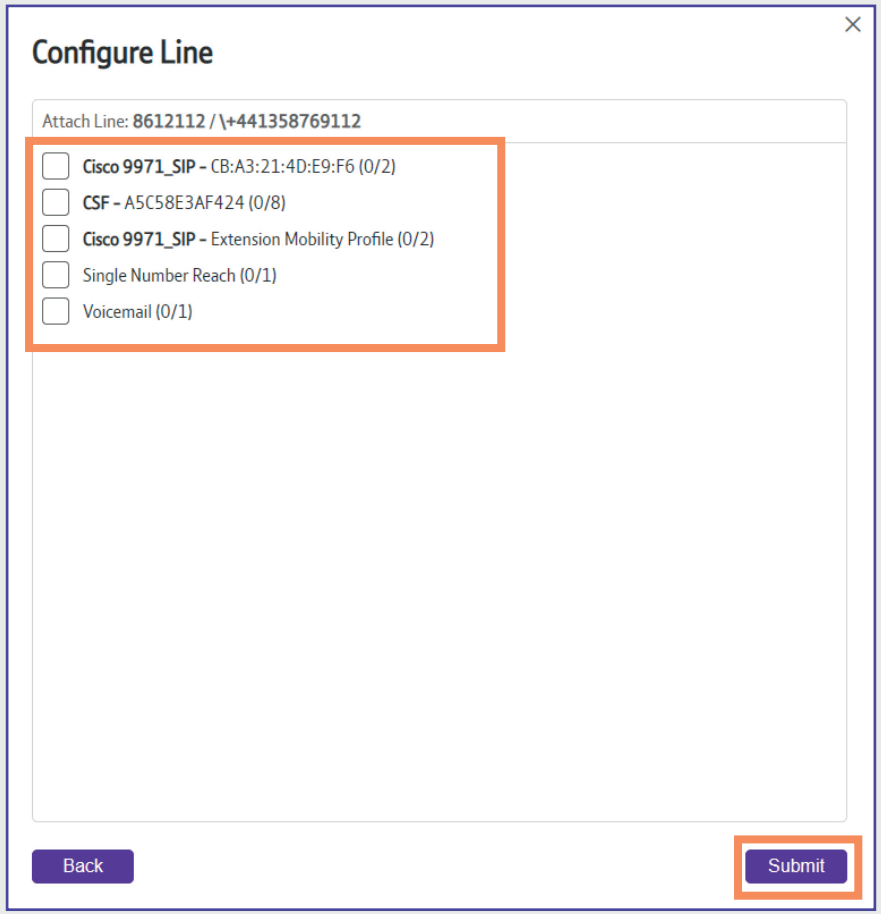
A public number is their direct line.



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.

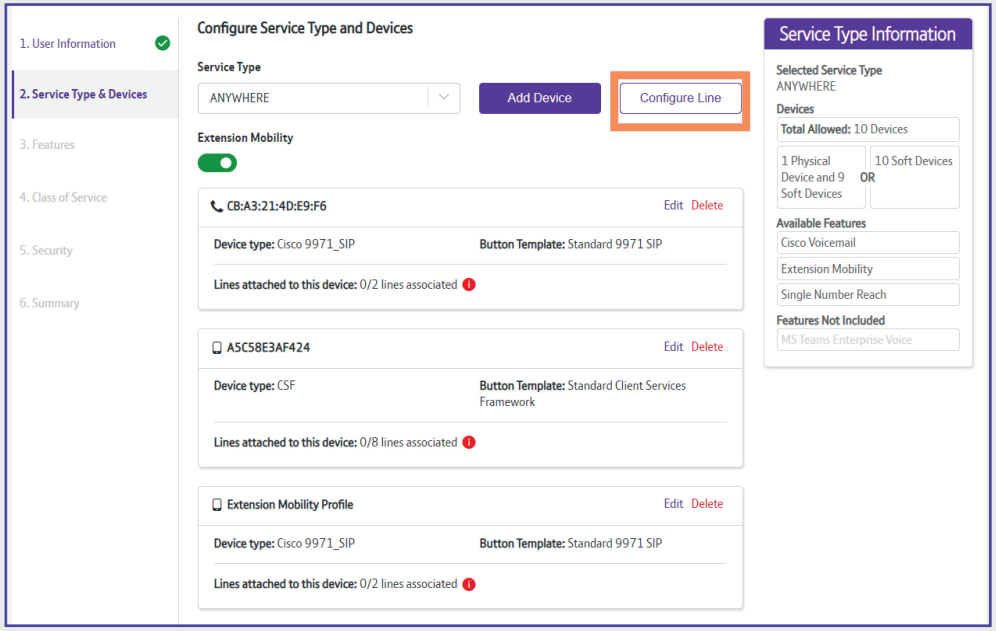


Select Submit to confirm

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

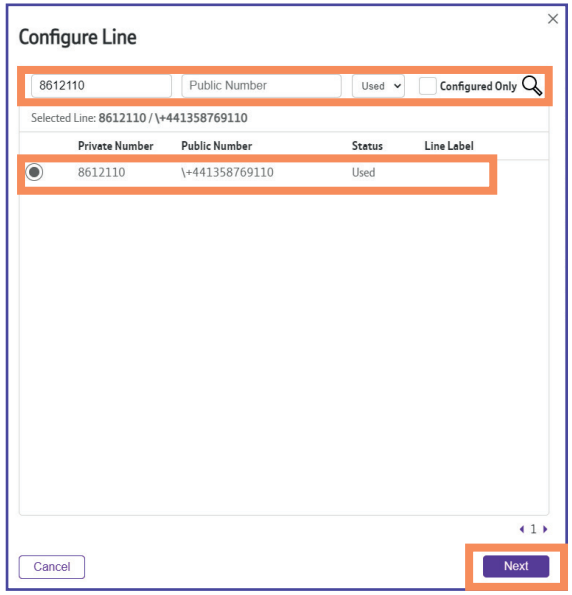
You do this by configuring a second line and searching for the used number.

Select **Configure Line**



Search for the used number.

Select the used line, then d**select** Next.

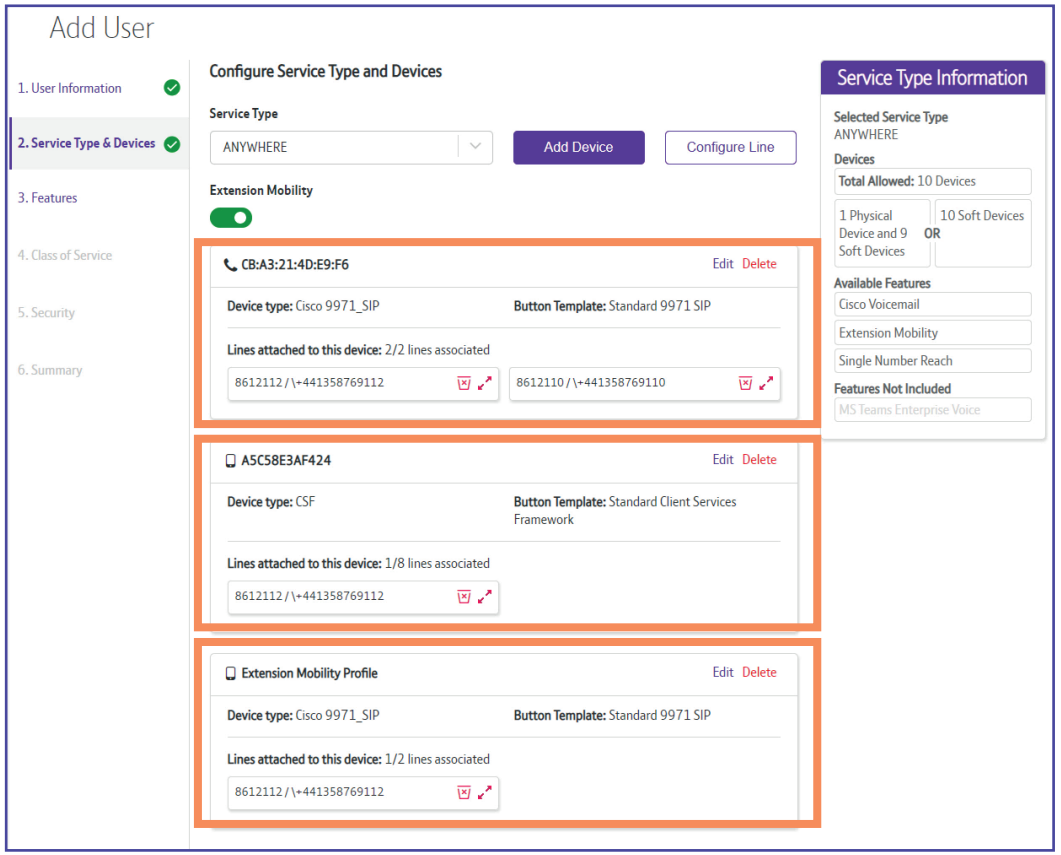


Select the device this line is associated with.

Then **select** **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.

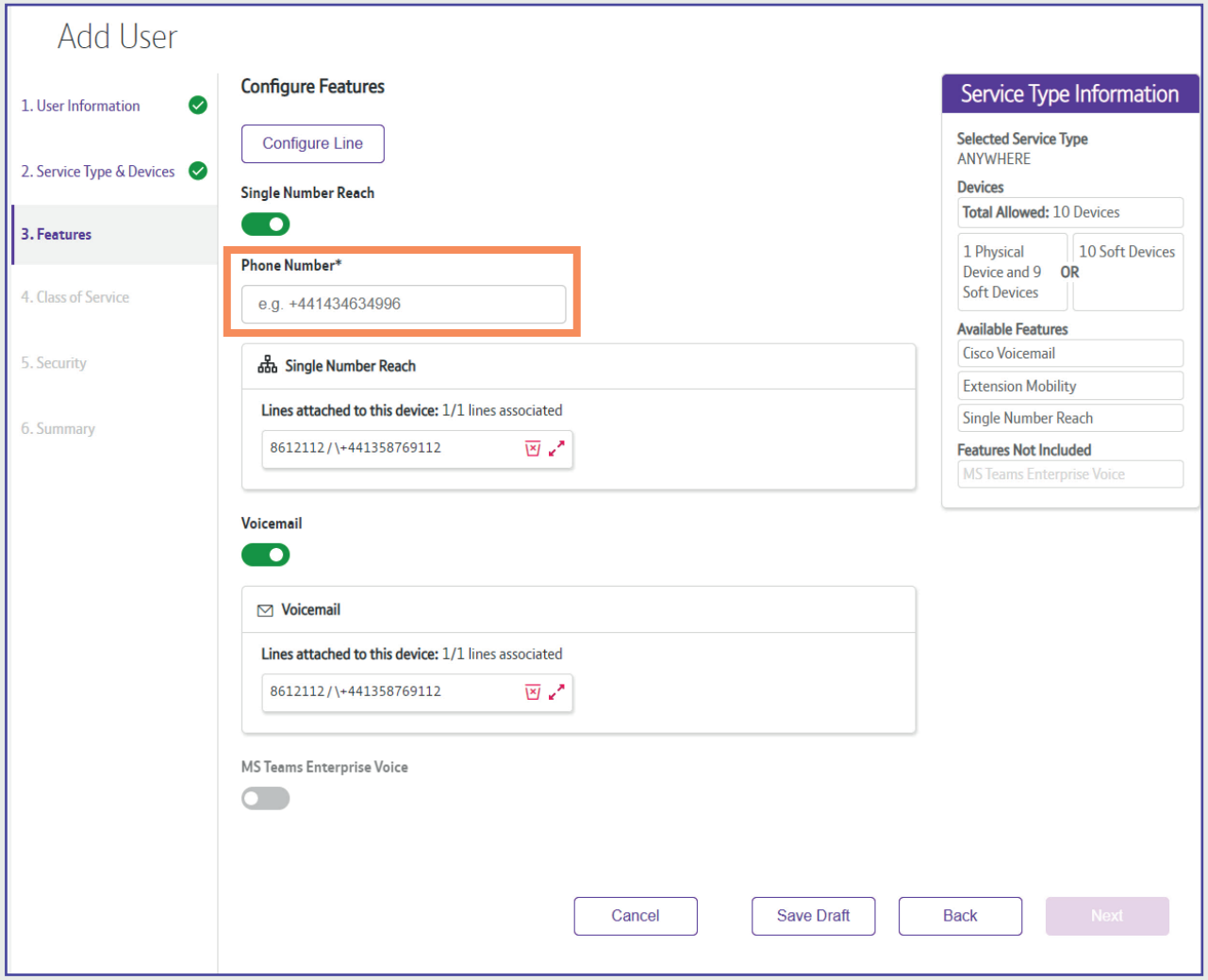


Step3 | Add the features

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.



Step 4. | Class of Service

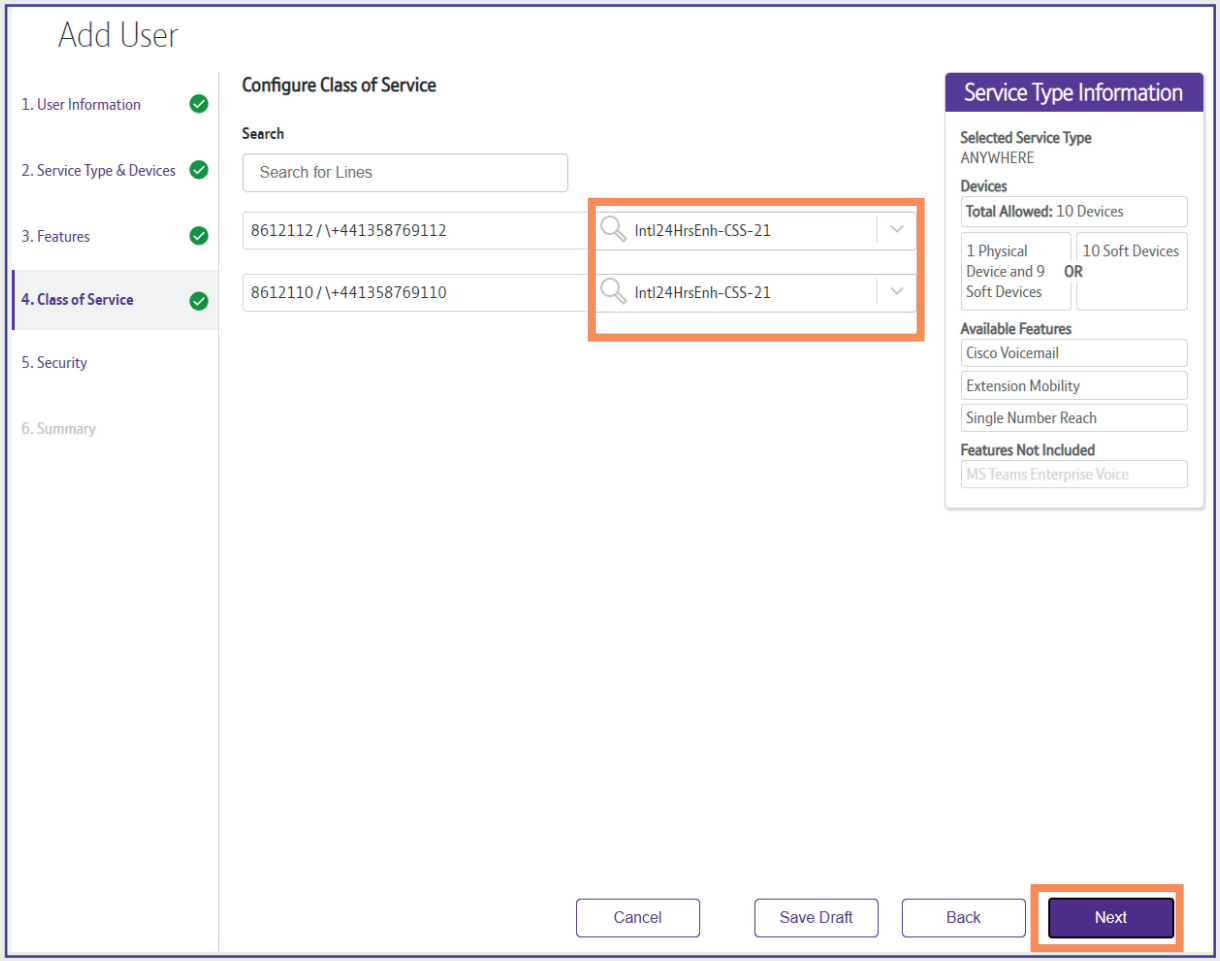
This is where you associate the appropriate **class of service** or **calling search space** to the line.

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.



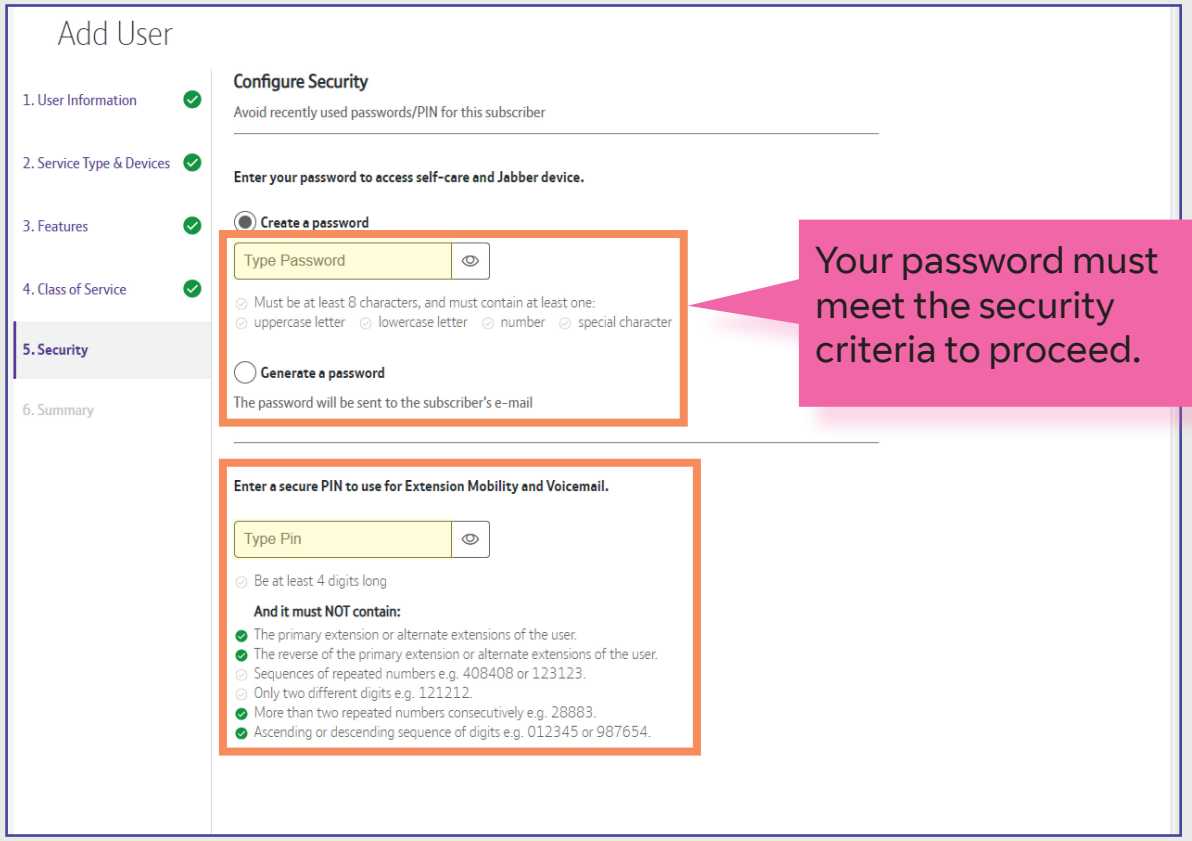
Step 5. | Security

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.



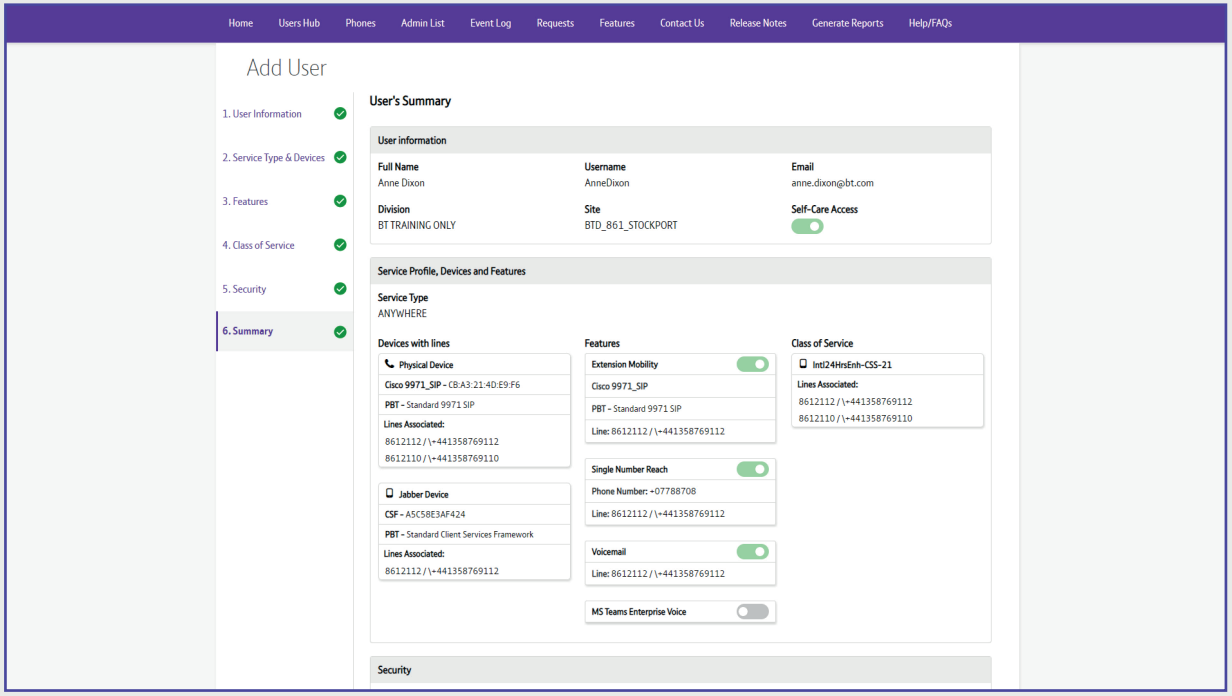
Step 6. | Summary

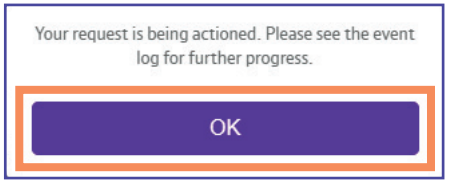
With the five steps complete, a full summary of the order will be displayed.

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.



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

Select OK to complete the process.