



Cisco Unified Communications Manager Assistant User Guide for Cisco Unified Communications Manager 6.0

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Text Part Number: OL-12452-01

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Preface

This preface describes who should read this publication and its document conventions.

The preface covers these topics:

- [Overview, page vii](#)
- [Organization, page viii](#)
- [How to Use Online Help, page ix](#)
- [Related Documentation, page ix](#)
- [Obtaining Documentation, Obtaining Support, and Security Guidelines, page x](#)

Overview

Cisco Unified Communications Manager Assistant is a feature that enhances the functionality of the phone system to allow managers and their assistants to work more effectively together. *Cisco Unified Communications Manager Assistant User Guide* provides instructions and examples to help you use the Cisco Unified Communications Manager Assistant feature.

All users of Cisco Unified Communications Manager Assistant should read this publication. Users include managers and assistants.

Managers

A Cisco Unified Communications Manager Assistant *manager* is a user whose incoming calls are intercepted and redirected to an assistant. The manager is supported by at least one assistant.

Managers can use Cisco Unified Communications Manager Assistant directly on their Cisco Unified IP Phones. However, managers will configure their features from the Manager Configuration window, or they can ask assistants to configure these preferences for them.

For details, see [How to Configure Manager Features, page 69](#).

Assistants

A Cisco Unified Communications Manager Assistant *assistant* is a user who handles calls on behalf of a manager.

Depending on how the feature is set up and used, Cisco Unified Communications Manager Assistant can automatically or manually intercepts incoming calls that were originally intended for a manager and redirects them to another target—which might be the manager’s assistant. Assistants can answer, transfer, divert, and otherwise handle calls that Cisco Unified Communications Manager Assistant redirects to them.

One assistant can support as many as 33 managers.

Assistants can access most Cisco Unified Communications Manager Assistant features on their computers, using an application called the Assistant Console. Assistants can use the Assistant Console to:

- Place, answer, transfer, put on hold, end, divert, or add conference participants to a call.
- Monitor a manager’s call activity and feature status.
- Enable or disable manager features.
- Configure manager features.

Organization

Table 1 provides an overview of the organization of this guide.

Table 1 *Cisco Unified Communications Manager Assistant User Guide Organization*

Section	Description
“Introduction to Cisco Unified Communications Manager Assistant”	Describes Cisco Unified Communications Manager Assistant in Shared-line mode, in Proxy-line mode, and how to identify which mode you are using.
“Getting Started with the Cisco Unified Communications Manager Assistant Console”	Provides assistants with a comprehensive overview of the Assistant Console.
“How to Use the Assistant Console to Handle Calls”	Provides assistants with task-based instructions for using the Assistant Console to handle and monitor calls and features for one to five managers.
“Assistants—How to Use Cisco Unified Communications Manager Assistant on Your Phone”	Describes how to use distinctive ringing, softkeys, and the intercom on the assistant’s Cisco Unified IP Phone.
“For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Shared-line Mode”	Describes how to use the Cisco Unified Communications Manager Assistant features in shared line mode.

Table 1 Cisco Unified Communications Manager Assistant User Guide Organization

Section	Description
“For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Proxy-Line Mode”	Describes how to use the Cisco Unified Communications Manager Assistant menu, softkeys, and the status window on the manager’s Cisco Unified IP Phone to handle calls and monitor an assistant’s call activity in proxy line mode.
“How to Configure Manager Features”	Describes how managers and assistants can customize manager features using the Manager Configuration window.

How to Use Online Help

The Cisco Unified Communications Manager Assistant online help system provides task-oriented help as well as context-sensitive help from most windows in the Cisco Unified Communications Manager Assistant user interface.

To access online help, click the ? button or click **Help** in the menu bar, which is located along the top of the console.

Once you open the help window, you can click **Search** in the toolbar to search the entire *Cisco Unified Communications Manager Assistant User Guide* by keyword. Click **View PDF** for a print-friendly version of the document.



Note The Search feature might not function in some versions of online help.

You must have Adobe Acrobat installed (either as an independent application or as a plug-in to your browser) to view a PDF copy of this document.

Related Documentation

Refer to the Cisco Unified IP Phone documentation at the following URL for more information:
http://www.cisco.com/en/US/products/hw/phones/ps379/tsd_products_support_series_home.html

Obtaining Documentation, Obtaining Support, and Security Guidelines

For information on obtaining documentation, obtaining support, providing documentation feedback, security guidelines, and also recommended aliases and general Cisco documents, see the monthly *What's New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation, at:

<http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html>

Introduction to Cisco Unified Communications Manager Assistant

Cisco Unified IP Phones are used in a network that can have up to 3500 managers and 3500 assistants. Managers and assistants in a large network may experience large phone-call volumes from both outside and inside the network.

To help managers and assistants handle these phone calls more effectively, Cisco Unified Communications Manager Assistant provides call-routing capabilities and other features.

This chapter contains the following sections:

- [Description of Shared-line Mode and Proxy-line Mode, page 1](#)
- [How to Identify the Mode on a Manager's Phone, page 3](#)
- [How to Identify the Mode on the Assistant Console, page 4](#)

Description of Shared-line Mode and Proxy-line Mode

Cisco Unified Communications Manager Assistant operates in two modes—shared-line mode and proxy-line mode. The features available to you are based on the mode your system administrator has chosen for your Cisco Unified Communications Manager Assistant configuration.

This section contains the following sections:

- [Using Manager Assistant in Shared-Line Mode, page 1](#)
- [Using Manager Assistant in Proxy-Line Mode, page 2](#)

Using Manager Assistant in Shared-Line Mode

If a system administrator has configured Cisco Unified Communications Manager Assistant in shared-line mode, the manager and assistant share a directory number; for example 8001. The assistant handles calls for a manager on the shared directory number. When a manager receives a call on 8001, both the manager's phone and the assistant's phone will ring.

The Cisco Unified Communications Manager Assistant features that are not applicable in shared-line mode include default assistant selection, assistant watch, call filtering, and divert all calls. An assistant cannot see or access these features on the Assistant Console application. The assistant's phone will not have the softkey for the divert all feature. The manager's phone will not have the softkeys for assistant watch, call intercept, or divert all feature.

If you are an assistant using Cisco Unified Communications Manager Assistant in shared-line mode, you do not need to be logged in to receive calls. Calls to your manager will automatically ring on your phone. You need to be logged into Assistant Console if you wish to use the application to handle calls or if you want to use the softkey on your phone to transfer a call to the manager's voice messaging system. See [“Getting Started with the Assistant Console”](#) for more information on using the Assistant Console.

If you are a manager using Cisco Unified Communications Manager Assistant in shared-line mode, you can share your directory number with up to 10 assistants. Any assistant who shared your directory number can answer and handle a call. See [“For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Shared-line Mode.”](#)

Related Topics

- [Using Manager Assistant in Proxy-Line Mode, page 2](#)
- [How to Identify the Mode on a Manager's Phone, page 3](#)
- [How to Identify the Mode on the Assistant Console, page 4](#)

Using Manager Assistant in Proxy-Line Mode

If a system administrator has configured Cisco Unified Communications Manager Assistant in proxy-line mode, the manager and assistant do not share a directory number. The assistant handles calls for a manager using a proxy number. The proxy number is not the manager's directory number, but an alternate number chosen by the system that an assistant uses to handle the manager's calls.

In proxy-line mode, a manager and an assistant have access to all features in Cisco Unified Communications Manager Assistant, including default assistant selection, assistant watch, call filtering, and divert all calls.

If you are an assistant using Cisco Unified Communications Manager Assistant in proxy-line mode, you must log in to the Assistant Console and have a filter enabled to receive calls made to your manager on your phone. You can use Assistant Console application for all call handling features, such as answering or transferring a call. See [“Getting Started with the Assistant Console”](#) for more information on using the Assistant Console.

If you are a manager using Cisco Unified Communications Manager Assistant in proxy-line mode, you can set up filters to selectively sort and filter incoming calls to your assistant. See [“For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Proxy-Line Mode”](#) for information on using all the features in Cisco Unified Communications Manager Assistant.

Related Topics

- [Using Manager Assistant in Proxy-Line Mode, page 2](#)
- [How to Identify the Mode on a Manager's Phone, page 3](#)
- [How to Identify the Mode on the Assistant Console, page 4](#)

How to Identify the Mode on a Manager's Phone

To identify your Cisco Unified Communications Manager Assistant mode on a manager's phone, reset the LCD display on the phone by picking up the receiver and replacing it.

If you see a single icon in the status window of the LCD display (a bell or crossed-out bell icon), then you are using Cisco Unified Communications Manager Assistant in shared-line mode (see [Figure 1](#) or [Figure 2](#)). See “[For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Shared-line Mode.](#)”

Figure 1 LCD Display of the Status Window on a Cisco Unified IP Phone (7940G or 7960G) in Shared-line Mode



Figure 2 LCD Display of the Status Window on a Cisco Unified IP Phone (7941G, 7941G-GE, 7961G, 7961G-GE, 7970G, 7971G-GE) in Shared-line Mode



If you see multiple icons in the status window of the LCD display, then you are using Cisco Unified Communications Manager Assistant in proxy-line mode (see [Figure 3](#) or [Figure 4](#)). See “[For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Proxy-Line Mode.](#)”

Figure 3 LCD Display of the Status Window on a Cisco Unified IP Phone (7940G or 7960G) in Proxy-line Mode



Figure 4 LCD Display of the Status Window on a Cisco Unified IP Phone (7941G, 7941G-GE, 7961G, 7961G-GE, 7970G, 7971G-GE) in Proxy-line Mode



Related Topics

- [Using Manager Assistant in Shared-Line Mode, page 1](#)
- [Using Manager Assistant in Proxy-Line Mode, page 2](#)
- [How to Identify the Mode on the Assistant Console, page 4](#)

How to Identify the Mode on the Assistant Console

To identify your Cisco Unified Communications Manager Assistant mode on the Assistant Console:

-
- Step 1** Log in to the Assistant Console Application. See [How to Log In to the Assistant Console, page 8](#).
- Step 2** Find the extension number adjacent to a manager's name in the My Calls Panel. See [Using the My Calls Panel, page 14](#).
- Step 3** For the same manager, find the extension number adjacent to the telephone icon in the Call Details column in the My Managers Panel. See [Using the My Managers Panel, page 15](#).



Note

If you cannot see a number adjacent to the telephone icon, click and drag the Call Details heading border to increase the width of the column.

If the extension numbers are the same, you are using Cisco Unified Communications Manager Assistant in shared-line mode. The assistant and the manager have the same directory number and are sharing a line.

If the extension numbers are different, you are using Cisco Unified Communications Manager Assistant in proxy-line mode. The assistant is assigned an alternate directory number to handle calls on a manager's behalf. The alternate number is a proxy number that represents the manager's actual directory number.



Note

In shared-line mode, you will see four headings in the My Manager's Window Panel—Manager, Intercom, DND, and Call Details. In proxy-line mode, you see the additional headings—Divert All, Asst. Watch, Filter Calls, and Filter Mode.

Related Topics

- [Using Manager Assistant in Shared-Line Mode, page 1](#)
- [Using Manager Assistant in Proxy-Line Mode, page 2](#)
- [How to Identify the Mode on a Manager's Phone, page 3](#)

Support for Other Languages

Cisco Unified Communications Manager Assistant supports a number of different languages, including Arabic and Hebrew.



Note If Arabic or Hebrew are used, the appearance of the Cisco Unified Communications Manager Assistant screens change to reflect the right-to-left direction of these languages.

For more information on using different languages with your phone, contact your system administrator.

Getting Started with the Cisco Unified Communications Manager Assistant Console

The Assistant Console application helps assistants to handle calls for managers more effectively. Cisco Unified Communications Manager Assistant operates in two modes—shared-line mode and proxy-line mode. Your access to the features described below are based on the mode your system administrator has chosen for your Cisco Unified Communications Manager Assistant configuration. As an assistant using Cisco Unified Communications Manager Assistant in shared-line mode, you are assigned the same directory number as your manager. You use this shared number to handle calls on your manager's behalf. As an assistant using Cisco Unified Communications Manager Assistant in proxy-line mode, your manager is assigned a directory number and you are assigned an alternate directory number that you will use as a proxy. You use the proxy number to handle calls on your manager's behalf. Before you begin, you should identify which mode your system administrator has chosen. See [How to Identify the Mode on the Assistant Console, page 4](#), for more information.

As an assistant, you can access Cisco Unified Communications Manager Assistant features on your computer using the Assistant Console application.

You can use the Assistant Console to:

- Place, answer, divert, transfer, end, or hold a call
- Add conference participants to a call
- Perform speed dialing
- Do directory searches
- Open an intercom line to your manager



Note If the intercom feature is not available on your phone, contact your system administrator.

- Monitor manager call activity
- Change manager features and settings
- Customize your call-handling tools
- Enter numbers on a virtual keypad in response to interactive voice systems

Related Topics

- [Description of Shared-line Mode and Proxy-line Mode, page 1](#)
- [Getting Started with the Assistant Console, page 8](#)

- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How You and Your Manager Will Use Cisco Unified Communications Manager Assistant, page 24](#)



Note Cisco Unified Communications Manager Assistant allows you to handle calls for yourself and for as many as 33 managers.

Getting Started with the Assistant Console

This section contains the following topics:

- [How to Log In to the Assistant Console, page 8](#)
- [How to Log Out of the Assistant Console, page 9](#)
- [How to Explore the Console without Assisting Managers, page 9](#)
- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Console with Your Mouse and Keyboard, page 21](#)
- [How to Use the Intercom Feature from the Console, page 22](#)

How to Log In to the Assistant Console

Log in to the Assistant Console to handle calls on behalf of one or more managers. When you log in, you are online and ready to handle calls.

To log in, enter your User ID and Password in the Cisco Unified Communications Manager Assistant Log In dialog box. Your user name and password are provided to you by your system administrator.



Note You can instruct Cisco Unified Communications Manager Assistant to remember your Login information.

The Assistant Console opens on your desktop.

You are now logged in and available to provide call-handling support for your managers until the time that you log off (or until there is a change in your online, connected, or call control status. For more information on status information, see [Using the Status Bar, page 19](#).

Tips

- The My Managers panel of the console shows you which managers expect your assistance. Two green arrows next to a manager's name indicates that the manager is logged in and therefore expects assistance; a manager whose name is greyed-out does not expect assistance.

- If you click the **Settings** button in the Cisco Unified Communications Manager Assistant Log In dialog box, you can monitor basic and advanced administrative settings. Your system administrator might ask you to monitor these settings to help troubleshoot a problem. Do not modify these settings unless instructed to do so by your system administrator.

Related Topics

- [How to Log Out of the Assistant Console, page 9](#)
- [How to Explore the Console without Assisting Managers, page 9](#)
- [How to Find Your Way Around the Console, page 10](#)
- [Using the My Managers Panel, page 15](#)
- [How to Use the Console with Your Mouse and Keyboard, page 21](#)

How to Log Out of the Assistant Console

To log out of the Assistant Console, click **File > Exit** from the menu bar at the top of the console. If you check the **Remember user ID and Password** option, you will be automatically logged in the next time that Assistant Console is started on your computer.



Note

If you are using a shared computer, you may wish to log out of the Assistant Console by clicking **File > Log Out** from the menu bar. Assistant Console will display the login dialog box instead of automatically logging in with your user ID and password.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)

How to Explore the Console without Assisting Managers

If you are using Cisco Unified Communications Manager Assistant in proxy-line mode, you can get familiar with Assistant Console without making yourself available to managers. You will not be able to go offline to explore the console in shared-line mode.

To access the console without assisting managers, log in as usual, then click the **Go Offline** call control button. This is the first icon button in the row of icons along the top or side of your screen. You can also perform this task by choosing **File > Go Offline** from the menu bar.

When you go offline in this way, Cisco Unified Communications Manager Assistant moves the managers whom you were assisting to another assistant. During the time that you are offline, you will be unavailable to receive phone calls for managers and the My Managers panel on your console will be inactive.

Once you go back online, you will be available to assist managers again. Cisco Unified Communications Manager Assistant might move managers whom you were previously helping (before you went offline) back to you. This depends on the availability of other assistants and whether or not you have been designated as the default assistant for a manager. For information about how to assign a default assistant, see [How to Assign a Default Assistant to a Manager, page 71](#).

To resume your online status, click the **Go Online** call control button. (This is the same button as the Go Offline button). Or you can choose **File > Go Online** from the menu bar.



Tip Your online status is visible from the status bar in the lower right corner of the console.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)

How to Find Your Way Around the Console

The following sections identify areas on the Assistant Console and how you can use them to control features and handle calls:

- [Using the Menu Bar, page 10](#)
- [Using Call Control Buttons, page 11](#)
- [Using the My Calls Panel, page 14](#)
- [Using the My Managers Panel, page 15](#)
- [Using the Speed Dial Feature, page 18](#)
- [Using the Directory, page 19](#)
- [Using the Status Bar, page 19](#)
- [Adjusting the Console Layout, page 20](#)
- [Viewing Administrative Settings, page 20](#)

Using the Menu Bar

The menu bar is located along the top of the Assistant Console. Menu commands are context-sensitive. You can use the menu bar as follows:

- File—Go online/offline, log in/log out, and exit the console.
- Edit—Create and edit speed dials, personalize keyboard shortcuts, change the divert target, set preferences, and access administrator settings.
- View—Specify text size and color schemes, and refresh the default layout.
- Call—Dial, answer, hang up, place on hold, transfer, divert, or add conference participants to a call.
- Manager—Place an intercom call to a manager, access the Manager Configuration window, and enable/disable features for a manager.

**Note**

If the intercom feature is not available on your phone, contact your system administrator.

- Help—Access online help.

Related Topics

- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

Using Call Control Buttons

You can perform tasks from the Assistant Console by clicking call control buttons (the row of icons located along the top or side of the console). Position your mouse over a call control button to see a description of its function.

See [Table 2](#) for a list of call control buttons.

Table 2 **Call control buttons**







Call control button	What it does
<p>Go Online</p> 	<p>Works in conjunction with the Go Offline button to toggle your connection status on the Assistant Console application. The Go Online button allows you to resume your online connection on Assistant Console, so you can handle calls on behalf of your manager.</p>
<p>Go Offline</p> 	<p>Works in conjunction with the Go Online button to toggle your connection status. The Go offline allows you to explore the console; you will be unavailable to handle manager calls.</p>
<p>Dial</p> 	<p>Opens a dialing pad that you can use to place outgoing calls.</p>
<p>Answer</p> 	<p>Connects you to an incoming call.</p>
<p>Hang Up</p> 	<p>Ends an active call.</p>
<p>Hold</p> 	<p>Works with the Resume button to toggle a call's hold status. The hold button places a call on hold.</p>

Table 2 Call control buttons (continued)









Call control button	What it does
Resume 	Works with the Hold button to toggle a call's hold status. The resume button takes a call off hold.
Transfer 	Transfers a connected call directly to the target number that you enter in a pop-up window.
Consult Transfer 	Works like the Transfer button, but allows you to speak to the person to whom you want to transfer a call.
Direct Transfer 	Transfers one existing call to another existing call.
Conference 	Allows you to add conference participants to a call.
Join 	Conferences multiple existing calls. You can join up to 15 simultaneous calls.

Table 2 **Call control buttons (continued)**

Call control button	What it does
 Redirect	Immediately diverts a ringing, connected, or held call to the manager for whom the call was originally intended, or to another target number. To specify your divert target, choose Edit > Redirect from the menu bar.
 Transfer to VM	Redirects a ringing or connected call to the manager's voice messaging system.

Call control buttons are context-sensitive; the availability of a button depends on the state of the selected call.

Make sure that the call that you want to handle with a call control button is selected (highlighted) before you click the button.



Tip You can right-click on the blank space (not on the buttons, themselves) in the call control panel to rearrange its position on the console.

Related Topics

- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

Using the My Calls Panel

The Assistant Console displays calls for you and for your managers in the My Calls panel. These are calls that you can act on by using tools in the Assistant Console. Cisco Unified Communications Manager Assistant supports up to 33 lines.

Each call is displayed beneath its associated phone line.

Each phone line is displayed beneath one of the following headings:

- My lines—Displays any currently active call that you have placed or received using your own phone line.

- Manager lines—Displays active calls that you are handling or can handle on behalf of your manager.
- Intercom—Displays the status of your intercom lines, if applicable.

**Note**

If the intercom feature is not available on your phone, contact your system administrator.

Depending on the number of managers assigned to you, you will see one to 33 lines in the “Manager lines” section of the My Calls panel.

Each manager line contains:

- Either your manager’s shared-line number or your manager’s proxy phone extension number. The proxy number is not your manager’s directory number, but a number that you use to handle your manager’s calls.
- The manager’s name.
- Active call information—Active calls are represented by:
 - an animated icon indicating the status of the call (ringing, connected, or on hold)
 - the caller ID
 - a timer indicating the duration of the call

Tips

- You must enter the actual extension (rather than a proxy extension) when transferring a call to a manager. You can see a manager’s actual phone extension in the My Managers panel on the Assistant Console.
- You cannot apply Transfer to Voice Messaging or Redirect to calls that you place or receive on your own phone line. These features apply only to calls you receive on a manager’s line.
- When you are using Cisco Unified Communications Manager Assistant in shared-line mode, you can identify that your manager or another assistant has answered a call when you see a double red arrow next to your manager’s line.

Related Topics

- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

Using the My Managers Panel

You can use the My Managers panel in the Assistant Console to monitor call activity and feature status for each of your managers. You can also enable and disable manager’s features from this panel.



Note Alert Tone, Do Not Disturb, Divert All, Assistant Watch, Filter Calls, and Filter Mode features are only available in proxy-line mode.

Table 3 describes the information displayed under each column heading in the My Managers panel.

Table 3 Information displayed in the “My Managers” panel of the Assistant Console

“My Managers” column heading	What it means
Manager	Displays the name of the manager. If the entire row of information for a manager is greyed-out, the manager is not expecting you to handle calls on his or her behalf. In addition, you may see the following two different icons next to the manager icon: <ul style="list-style-type: none">• If you see two green arrows next to the manager icon, the corresponding manager expects you to handle calls on his or her behalf.• If you see an envelope icon next to the manager icon, then the corresponding manager has a voice message.
Intercom	Click this column to place an intercom call to a manager. Note If the intercom feature is not available on your phone, contact your system administrator.
DND	If this box is checked, the Do Not Disturb (DND) feature is enabled. To toggle DND on and off, click the DND cell. The DND feature disables the ringer on the manager’s phone; it does not redirect calls. Note If the DND feature is not available on your phone, contact your system administrator.
DivAll	(Proxy-line Mode Only) If this box is checked, the Divert All (DivAll) feature is enabled. To toggle Divert All on and off, click the DivAll cell. Divert All automatically redirects all incoming calls to the manager’s divert target.
Assistant Watch	(Proxy-Line Mode Only) A check mark indicates that the manager has enabled Assistant Watch. This feature allows a manager to view the caller ID and duration of calls that you are handling on his or her behalf.
Alert Tone	(Proxy-Line Mode Only) A check mark indicates that calls to the manager generate an audio alert on the manager’s phone.
Filter Enabled	(Proxy-Line Mode Only) If this box is checked, a call filter is active. To toggle the filter on and off, click the filter cell. Filters can route calls to you or to the corresponding manager, based on caller ID and filter mode.

Table 3 Information displayed in the “My Managers” panel of the Assistant Console (continued)

“My Managers” column heading	What it means
Filter Mode	<p>(Proxy-Line Mode Only) There are two filter modes:</p> <ul style="list-style-type: none"> • Inclusive—Calls that match the numbers in the Inclusive filter are sent to the <i>manager</i>; the remainder are redirected to you. • Exclusive—Calls that match the numbers in the Exclusive filter are redirected to <i>you</i>; the remainder are sent to the manager. <p>To configure filters for a manager, use the Manager Configuration window. Right-click anywhere in a manager’s row in the My Managers panel and choose Configure to open this window.</p> <p>Note In the initial default filter settings, the Inclusive filter is enabled and all manager calls are directed to you.</p>
Call Details	<p>Call details consist of the manager’s line number, the call duration, and the caller ID:</p> <ul style="list-style-type: none"> • Line—The actual extension number for the manager’s primary phone line; a phone icon indicates the line state. • Call duration—The real-time duration of an active call that was placed or received by the manager. The timer starts as soon as a call is initiated (outgoing) or received (incoming). The timer stops when the call is dropped or transferred. • Caller ID—The name (if available) and number of the person to whom the manager has placed a call, or from whom the manager has received a call. Assistant console will display forwarded call information when the information is available.

**Tip**

You can monitor—but cannot handle—calls that appear in the My Managers panel of the console. These are calls that you have already redirected to your manager, or calls that your manager has placed or received directly.

Related Topics

- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)
- [How to Configure Manager Features, page 69](#)

Using the Speed Dial Feature

The speed dial feature allows you to set up a personal phone book right on the Assistant Console. You can place calls and perform other call-handling tasks using speed dial numbers.

To open the speed dial menu and view a list of available commands, right-click on the Speed Dials panel or choose **Edit > Speed Dials** from the menu bar. If some speed dial commands are greyed-out, try selecting a speed dial listing before opening the menu.

Use the speed dial menu to create and modify speed dial groups, place a call, specify a transfer target, and add conference participants to a call.

To access speed dial numbers quickly, consider organizing entries into speed dial groups. For example, create a personal group for yourself and a group for each of your managers.

When you add new speed dial listings, the listings appear in the order that you created them. To sort all the items in a speed dial list, click on a column header (Name, Telephone Number, or Notes). Lists are sorted alphabetically or numerically, depending on the header you choose. Click the header again to toggle between ascending and descending order.

You can make calls using your speed dial listings in one of the following ways:

- Drag the speed dial entry to either your line or your manager's line.
- Make a call on your line by highlighting your line and double-clicking on the speed dial entry. Make a call on your manager's line by highlighting your manager's line and double-clicking on the speed dial entry.
- Drag the speed dial entry to the dial button on your call control panel and click **OK**.

Here are some quick ways to use your speed dial listings (without opening the speed dial menu):

- To perform a blind transfer to a person in your speed dial list, drag and drop an active call to the person's speed dial listing.
- To add a new speed dial listing, drag and drop a listing from the Directory panel to the Speed Dial panel.



Tip

The Sample speed dial group and example speed dial listing are inactive; they are included to demonstrate how speed dial information appears on the console. You can delete the samples at your convenience.

Related Topics

- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

Using the Directory

Use the directory to search for a coworker, and to place and handle calls using the search results.

To search for a coworker, enter any portion of the person's first and/or last name in the search fields and click **Search**.

The directory displays a list of all users that match your search string. Search results are sorted by first name, last name, phone number, and department.

To clear search results and search fields, click the **Clear** button.

Here are some ways to use the search results:

- Double-click on a person's name or number to place a call.
- Right-click on a person's name to display a pop-up menu containing relevant commands.
- To perform a blind transfer to a person in your directory, drag and drop an active call to the appropriate name or number.
- To add a new speed dial listing, drag and drop a listing from the Directory panel to the Speed Dials panel.

Related Topics

- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

Using the Status Bar

The status bar is located along the bottom of your Assistant Console screen and displays the following system information:

- **Connected/Not Connected**—Indicates the status of your connection to the Cisco Unified Communications Manager Assistant server.
- **Online/Offline**—Indicates the status of your availability to managers.
- **Call Control Up/Call Control Down**—Indicates the availability of call-handling features.
- **Filtering Down** —Indicates the availability of the call filtering features.

The status bar also displays a pop-to-top icon to indicate whether your console is set to automatically surface on your desktop when you receive an incoming call. Click the pop-to-top icon to toggle this feature on and off. (By default, the feature is disabled.) The icon appears darker (depressed) when the feature is enabled.

Additionally, you can enable/disable pop-to-top from the **Edit > Preferences** menu.

Related Topics

- [How to Find Your Way Around the Console, page 10](#)

- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

Adjusting the Console Layout

You can customize the size and position of panels in the Assistant Console. Use the View menu to change the color scheme and font, and to refresh initial default settings.



Tip

You can set the console to automatically surface on your desktop when you receive an incoming call. To enable this “pop-to-top” feature, choose **Edit > Preferences** from the main menu, then click the “Activate console on new call” check box. A pop-to-top icon is located in the status bar at the bottom of your console screen. The icon appears darker (depressed) when the feature is enabled.

Related Topics

- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

Viewing Administrative Settings

You can view your administrative settings from the Log In dialog box or you can choose **Edit > Settings** from the menu bar.



Note

You do not need to modify administrative settings unless you are instructed to do so by your system administrator.

There are two types of settings:

- Basic Settings
 - Cisco Unified Communications Manager Assistant Server Host Name or IP address
 - Cisco Unified Communications Manager Assistant Server Port
- Advanced Settings
 - Traces enabled/disabled

The Advanced Settings tab displays the location where your trace files are stored.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)
- [How to Configure Manager Features, page 69](#)

Setting Preferences

You can enable the following two settings in the preference menu:

- Setting the console to automatically appear on your desktop when you receive an incoming call—To enable the “pop-to-top” feature for the console, choose **Edit > Preferences** from the main menu, then click the “Activate console on new call” check box. A pop-to-top icon is located in the status bar at the bottom of your console screen. The icon appears in a darker shade when the feature is enabled.
- Setting your computer to automatically launch the assistant console application when you start up your computer—To enable the automatic startup feature, choose **Edit > Preferences** from the main menu, then click the “Autostart Console on computer startup” check box. Assistant Console will automatically launch the next time that you start up your computer

To disable each of the features, uncheck the corresponding check box.

How to Use the Console with Your Mouse and Keyboard

The Assistant Console provides you with several mouse and keyboard combinations to perform any given task.

You can:

- Click, right-click, and double-click console items
- Drag and drop console items
- Use keyboard shortcuts

For example, you can choose among the following options to answer a call:

- Click the **Answer** call control button
- Double-click the call in the My Calls panel
- Right-click on the call in the My Calls panel, then choose **Answer** from the pop-up menu
- Use a keyboard short cut

Some tasks can be accomplished by dragging and dropping console items. To add a speed dial listing, for example, you can drag and drop a selected call from the My Calls panel onto the Speed Dials panel.



Tip

You can find all of the options for performing a specific task, such as transferring a call, in “How to Use the Assistant Console to Handle Calls.”

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How to Use the Intercom Feature from the Console

The Intercom feature is an optional feature that is configured by your system administrator. It allows you to speak to a manager on an intercom line.



Note

If the intercom feature is not available on your phone, contact your system administrator.

Cisco Unified IP Phones 7941G, 7941G-GE, 7961G, 7961G-GE, 7970G, and 7971G-GE

To place an intercom call, double-click on that manager’s name in the My Calls panel. You can also single-click the corresponding intercom icon in the My Managers panel.

If you initiate an intercom call without specifying a manager, the manager at the top of your managers list is selected as the target for your call.



Note

The manager you connect to through an intercom call becomes the target of your speed-dial button.

If your manager is not on another call when you initiate an intercom call, your speakerphone and your manager’s speakerphone will open simultaneously. You can then talk using your phone’s speakerphone, headset, or handset.

If your manager is on another call when you initiate an intercom call, the intercom call will ring on the manager’s phone and must be answered manually. This is also the case when a manager places an intercom call to you at a time when you are on another call.

To end the intercom call, click the intercom icon again.

Cisco Unified IP Phones 7940G and 7960G

To place an intercom call, double-click on that manager's name in the My Calls panel. You can also single-click the corresponding intercom icon in the My Managers panel.

If your manager is not on another call when you initiate an intercom call, your speakerphone and your manager's speakerphone will open simultaneously. You can then talk using your phone's speakerphone, headset, or handset.

If your manager is on another call when you initiate an intercom call, the intercom call will ring on the manager's phone and must be answered manually. This is also the case when a manager places an intercom call to you at a time when you are on another call.

To end the intercom call, click the intercom icon again.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Find Your Way Around the Console, page 10](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [Assistants—How to Use Cisco Unified Communications Manager Assistant on Your Phone, page 35](#)

How to Use Keyboard Shortcuts

You can use keyboard shortcuts, rather than your mouse, to operate most of the tools and features on the Assistant Console. Keyboard shortcuts can help you handle calls more efficiently.

You can use initial default shortcuts or you can customize shortcuts to suit your needs. Cisco Unified Communications Manager Assistant remembers a customized shortcut the next time you log in.

Viewing Shortcuts

Click an item in the menu bar to display commands and shortcuts. A keyboard shortcut is associated with most menu commands.

Additionally, you can view shortcuts from the Edit Shortcut Key pop-up window. Choose **Edit > Keyboard Shortcuts** to open the window, then select a menu command from the list to see the associated shortcut.

For example, if you select **Call > Answer** in the Edit Shortcut Key window, you can see that the initial default shortcut uses a combination of the Control key (Ctrl) and the A key (Ctrl-A).

Customizing Keyboard Shortcuts

To customize a keyboard shortcut, choose **Edit > Keyboard Shortcuts** from the menu bar. Select a menu command from the list and click Ctrl, Shift, or Alt to assign the first part of the shortcut. Next, enter a letter or number in the Key field to assign the last part of the shortcut. Click **Save** to assign the new keyboard shortcut to the selected command.

Using Shortcuts

To invoke a shortcut, hold down the first key in the shortcut combination and press the second key. For example, if you want to use the Ctrl-L shortcut to put a call on hold, hold down **Ctrl** and press **L**.



Note For keyboard shortcuts to work, the Assistant Console page must be the active window on your desktop.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How You and Your Manager Will Use Cisco Unified Communications Manager Assistant

You will use Cisco Unified Communications Manager Assistant features from your phone and the Assistant Console to handle calls for your manager. For example, when you answer a call for your manager, you may wish to consult your manager by double-clicking the intercom line on your Assistant Console. If your manager chooses to pick up the call, you can forward the call by selecting the **Redirect** call button on the Assistant Console or by choosing the **Redirect** softkey on your phone. If your manager wants the caller to leave a voice message, you can forward the call to your manager's voice messaging system by selecting the **Transfer to Voice Mail** call button or by choosing the **TrnsfVM** softkey.

Your manager will use Cisco Unified Communications Manager Assistant features primarily from the Cisco Unified IP Phone. For example, your manager may be expecting a call from a real estate broker. Your manager would enable assistant watch to monitor the incoming calls. When the realtor's number appears, your manager can intercept the call with the **Intrcpt** softkey. Another example of how your manager might use Cisco Unified Communications Manager Assistant is to press the **Redirect** softkey on the phone to divert a ringing call to you. Your manager can confirm that you have answered the diverted call and monitors the duration of the call by looking at the Cisco Unified Communications Manager Assistant status window on the phone's LCD screen.



Tip You or your manager can customize manager features from the Manager Configuration window. To open this window, choose **Manager > Configuration** from the menu bar, or right-click anywhere in a manager's row in the My Managers panel and choose **Configuration**.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Find Your Way Around the Console, page 10](#)
- [How to Use the Intercom Feature from the Console, page 22](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Shared-line Mode, page 49](#)
- [For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Proxy-Line Mode, page 53](#)
- [How to Configure Manager Features, page 69](#)

How to Use the Assistant Console to Handle Calls

You can use your mouse and keyboard to place, answer, transfer, end, and otherwise handle calls from the Assistant Console.



Note Make sure the call you want to handle is selected (highlighted) on the console. Call control buttons and menu items appear grayed-out (inactive) if they are not relevant to the selected call.

To learn more, refer to the following call-handling topics:

- [How to Place a Call, page 27](#)
- [How to Answer a Call, page 28](#)
- [How to End a Call, page 28](#)
- [How to Put a Call on Hold, page 29](#)
- [How to Transfer a Call, page 29](#)
- [How to Set up a Conference Call, page 31](#)
- [How to Divert a Call to Another Number, page 32](#)
- [How to Send a Call to a Voice Messaging Service, page 33](#)

How to Place a Call

To place a call from the Assistant Console, choose any of the following options:

- Click the **Dial** call control button.
- Right-click on a phone line in the My Calls panel and choose **Dial** from the pop-up menu.
- Choose **Call > Dial** from the menu bar.
- Double-click a speed dial or directory number.
- Drag and drop a directory number into the My Calls panel.
- Use the associated keyboard shortcut.
- With the console open and active on your desktop, enter the phone number that you want to call using your keyboard, then press **Enter**. You can see the number that you are calling in the status bar along the bottom of the console.

If the Enter Number pop-up window appears, enter the phone number that you want to call and click OK.

Enter the number exactly as you would if you were placing the call from your Cisco Unified IP Phone. Calls originated from Assistant Console use the first physical line of the Assistant phone.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How to Answer a Call

To answer a selected call, choose any of the following options:

- Click the **Answer** call control button.
- Double-click on a ringing call in the My Calls panel.
- Right-click on the call and choose **Answer** from the pop-up menu.
- Choose **Call > Answer** from the menu bar.
- Use the associated keyboard shortcut.

If the incoming call that you want to answer is not selected (highlighted), click the incoming call to select it before performing one of the above actions.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How to End a Call

To end a selected call, choose one of the following options:

- Click the **Hang Up** call control button.
- Right-click on the call and choose **Hang Up** from the pop-up menu.
- Choose **Call > Hang Up** from menu bar.
- Use the associated keyboard shortcut.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)

- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How to Put a Call on Hold

To put a selected call on hold, choose one of the following options:

- Click the **Hold** call control button.
- Double-click on the connected call.
- Right-click on the call and choose **Hold** from the pop-up menu
- Choose **Call > Hold** from the menu bar.
- Use the associated keyboard shortcut.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How to Remove a Call from Hold

To take a selected call off of hold, choose one of the following options:

- Click the **Resume** call control button.
- Double-click on the held call.
- Right-click on the call and choose **Resume** from the pop-up menu
- Choose **Call > Resume** from the menu bar.
- Use the associated keyboard shortcut.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How to Transfer a Call

There are three ways to transfer calls:

- **Transfer**—Immediately redirects the call without allowing you to speak to the transfer recipient (the person to whom you are transferring the call).
- **Consult transfer**—Redirects the call after first allowing you to speak to the transfer recipient.
- **Direct transfer**—Directly connects two calls (active calls and calls on hold).

**Note**

You must answer a call before you can transfer it. After you transfer a call, you cannot retrieve it (unless the call is transferred back to you).

Transfer

To perform a transfer for a selected call, choose one of the following options:

- Click the **Transfer** call control button.
- Right-click on the call and choose **Transfer** from the pop-up menu.
- Choose **Call > Transfer** from the menu bar.
- Drag the call to a listing in the Speed Dials panel.
- Drag the call to a listing in the Directory panel.
- Use the associated keyboard shortcut.

Unless you drag the call to a listing in the Speed Dials or Directory panel, the Enter Number pop-up window appears. Enter the transfer recipient's phone number and click **OK**.

Consult Transfer

To perform a consult transfer for a selected call, choose one of the following options:

- Click the **Consult Transfer** call control button.
- Right-click on the call and choose **Consult Transfer** from the pop-up menu.
- Choose **Call > Consult Transfer** from the menu bar.
- In the Speed Dials or Directory panel, right-click on the listing to which you want to transfer the call, then choose **Consult Transfer** from the pop-up menu.
- Use the associated keyboard shortcut.

If the Enter Number pop-up window appears, enter the transfer recipient's phone number and click **OK**.

After you have spoken to the recipient, click the **Consult Transfer** button again to complete the transfer.

**Note**

You cannot complete a consult transfer while the phone is ringing or by using the drag-and-drop method. You must speak to the recipient to complete a consult transfer.

Direct Transfer

To perform a Direct transfer for a pair of calls, highlight the two calls and choose one of the following options:

- Click the **Direct Transfer** call control button.
- Right-click on the call and choose **Direct Transfer** from the pop-up menu.
- Choose **Call > Direct Transfer** from the menu bar.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How to Set up a Conference Call

There are two ways to set up a conference call:

- **Conference**—You initiate a call to add participants in a conference.
- **Join**— You connect active calls and calls on hold into a single conference call.

To add conference participants to an active and selected call, choose one of the following options:

- Click the **Conference** call control button.
- Right-click on the call and choose **Conference** from the pop-up menu.
- Choose **Call > Conference** from the menu bar.
- Right-click on a listing in the Speed Dials or Directory panels and choose **Conference** from the pop-up menu.
- Use the associated keyboard shortcut.

If the Enter Number pop-up window appears, enter the conference participant's phone number and click **OK**.

After you have spoken with the new conference participant, click the **Conference** button again to add the person to the call.

To set up a conference call using join, highlight the calls that you want in the conference and choose one of the following options:

- Click the **Join** call control button.
- Right-click on the call and choose **Join** from the pop-up menu.
- Choose **Call > Join** from the menu bar.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)

- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)

How to Divert a Call to Another Number

Use Redirect to transfer a selected call to a pre-determined target number. You can redirect a call that is ringing, connected, or on hold.

In proxy-line mode, the initial default target is the manager for whom the call was originally intended. In shared-line mode, there is no default target. However you can configure the target using any valid phone number or extension.

For details, refer to the following sections:

- [How to Use Redirect, page 32](#)
- [How to Configure the Divert Target, page 32](#)

How to Use Redirect

To redirect a selected call to the Divert target, choose one of the following options:

- Click the **Redirect** call control button.
- Right-click on the call and choose **Redirect** from the pop-up menu.
- Choose **Call > Redirect** from the menu bar.
- Use the associated keyboard shortcut.

Tips

- Unlike Transfer, which requires you to specify the target with each use, Redirect sends calls to a single, pre-determined target number.
- You can divert a call that is ringing, connected, or on hold.
- You cannot divert a call that you have placed or received on one of your own phone lines (rather than on a manager proxy line).

Related Topic

- [How to Configure the Divert Target, page 32](#)

How to Configure the Divert Target

You can set your Divert target to be the manager for whom the call was originally intended or another directory number.

To view or change the target, choose **Edit > Redirect** from the menu bar. The Divert Target pop-up window appears.

In shared-line mode, enter a phone number or office extension in the text box. Enter the number exactly as you would dial it from your office phone.

In proxy-line mode, you can choose to toggle between a Manager or Directory Number target. If you choose the Director Number option, enter a phone number or office extension. Enter the number exactly as you would dial it from your office phone.

Click **Save** to preserve your changes.

Tips

- In addition to configuring your own Divert target, you can do so for you manager. The manager's Divert target is distinct from yours. For instructions, see [How to Configure the Divert Target for a Manager, page 71](#).
- You can divert a call using your Cisco Unified IP Phone. Answer the call, then press the **Redirect** softkey on your Cisco Unified IP Phone to transfer the call to your Divert target.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)
- [How to Use Redirect, page 32](#)
- [Assistants—How to Use Cisco Unified Communications Manager Assistant on Your Phone, page 35](#)
- [How to Configure Manager Features, page 69](#)

How to Send a Call to a Voice Messaging Service

You can transfer a ringing or connected call that you are handling on behalf of a manager to that manager's voice messaging service.

To send a selected call to a voice messaging service, choose one of the following options:

- Click the **Transfer to Voice Mail** call control button.
- Right-click on the call and choose **Transfer to Voicemail** from the pop-up menu.
- Choose **Call > Transfer to Voicemail** from the menu bar.
- Use the associated keyboard shortcut.

Tips

- You can perform this task from your Cisco Unified IP Phone, as well. Answer the call, then press the **TrnsfVM** softkey on your Cisco Unified IP Phone to transfer the manager's call to his or her voice messaging service.

- This feature does not apply to calls that you have placed or received on one of your own phone lines. This feature only applies to calls on your manager's proxy line.

Related Topics

- [Getting Started with the Assistant Console, page 8](#)
- [How to Use Keyboard Shortcuts, page 23](#)
- [How to Use the Assistant Console to Handle Calls, page 27](#)
- [Assistants—How to Use Cisco Unified Communications Manager Assistant on Your Phone, page 35](#)

Assistants—How to Use Cisco Unified Communications Manager Assistant on Your Phone

You can access some Cisco Unified Communications Manager Assistant features directly on your Cisco Unified IP Phone. With the exception of Distinctive Ringing, these features are also available on the Assistant Console application.

Cisco Unified Communications Manager Assistant allows the assistant to use the physical phone buttons and softkeys to perform most of the tasks that the assistant can perform on the Cisco Unified Communications Manager Assistant Console application.

Cisco Unified Communications Manager Assistant features on the Assistant Phone can be used simultaneously with the Assistant Console application.

Cisco Unified Communications Manager Assistant on the Assistant Phone is supported on these phones:

- Cisco Unified IP Phone 7971G-GE
- Cisco Unified IP Phone 7970G
- Cisco Unified IP Phone 7961G
- Cisco Unified IP Phone 7961G-GE
- Cisco Unified IP Phone 7960G
- Cisco Unified IP Phone 7941G
- Cisco Unified IP Phone 7941G-GE
- Cisco Unified IP Phone 7940G



Note

Cisco strongly recommends that, to use Cisco Unified Communications Manager Assistant on the Assistant Phone, you should have no more than five managers supported by an assistant.



Note

Preferred assistants can be set by either the manager (using the web URL) or the assistant (using the console application), but not on the phone itself.

This section contains the following topics:

- [Proxy Line vs. Shared Line Mode, page 36](#)—Describes the two modes that Cisco Unified Communications Manager Assistant operates in.

- [Logging in to Manager Assistant on the Assistant Phone, page 37](#)—Describes the login process on the phone.
- [Checking Status of Your Managers, page 38](#)—Describes information about status of each manager that an assistant supports.
- [Handling Calls and Performing Other Actions, page 40](#)—Describes answering, transferring, diverting calls as well as other actions the assistant can perform.
- [How to Answer a Call Using Manager Assistant on the Phone, page 41](#)—Describes the three methods the assistant can use to answer the call.
- [Configuring Manager Settings, page 42](#)—Describes various settings the assistant can control for the supported managers.
- [Configuring Assistant Settings, page 44](#)—Describes how to configure assistant-related options such as divert targets and manager-status sorting.
- [How to Customize the Distinctive Ringing Feature, page 48](#)—Describes the procedure for associating ring types for each phone line.

Proxy Line vs. Shared Line Mode

The Cisco Unified Communications Manager Assistant application helps assistants to handle calls for managers more effectively. Cisco Unified Communications Manager Assistant operates in two modes—shared-line mode and proxy-line mode. Your system administrator configures this mode.

Shared-Line Mode

As an assistant using Cisco Unified Communications Manager Assistant in shared-line mode, you are assigned the same directory number as your manager. You use this shared number to handle calls on your manager's behalf.

Proxy-Line Mode

As an assistant using Cisco Unified Communications Manager Assistant in proxy-line mode, your manager is assigned a directory number and you are assigned an alternate directory number that you will use as a proxy. You use the proxy number to handle calls on your manager's behalf.

Identifying the Mode

Before you begin, you should identify which mode your system administrator has chosen. Check the Manager Settings screen:

- In shared-line mode, only the Do Not Disturb option appears on this screen.

- In proxy-line mode, multiple options appear on this screen.

Logging in to Manager Assistant on the Assistant Phone

To log in to the Cisco Unified Communications Manager Assistant on the assistant phone, perform these steps:

Procedure

Step 1 Press the **Services** button on the phone.

Step 2 Select **Primary IPMA Phone Service**.

Step 3 Enter your user ID and PIN, then press **Submit**.

The Manager Status screen should appear (see [Figure 5](#)).

Figure 5 *Manager Status Screen*





Note If the Primary IPMA Service goes down, the Assistant’s phone screen does not get updated to indicate this condition. However, the Assistant will receive a “Host not found Exception” message upon trying to use a softkey. In this case, the Assistant must manually select **Secondary IPMA Phone Service** from the IP Services menu, and log in again.

Checking Status of Your Managers

Figure 5 shows an example of the Manager Status screen. This screen contains a list of all managers that are supported by a specific assistant.

This sections describes the information shown on the screen and the softkeys on the screen.

Information Display on Manager Status Screen

For each manager supported by the assistant, the following information displays:

- Manager’s Assistant Status line—Indicates whether the assistant is online or offline.
- Number of managers in the list—Allows you to quickly determine the number of managers in the list.
- Name of manager—Sorted as follows in this order:
 - New call indication
 - Change of manager status from on hook
 - On hook
- Status icon to the left of the manager’s name—See Table 4 for a list and description of these status icons.
- Proxy line of the manager

Call Status Icons

Table 4 shows and describes the various call-status icons that appear to the left of the manager’s name on the Manager Status screen.

Table 4 **Call Status Icons**







Manager Call-state icon	What it does
Busy 	This icon appears in the Manager Status screen next to the manager's name if the manager's phone is busy.
Hold 	If the manager places a call on hold, this icon appears next to the manager's name on the Manager Status screen.
Idle/on hook 	This icon appears on the Manager Status screen next to the manager's name if that manager's phone is on hook.
Off hook 	This icon appears on the Manager Status screen next to the manager's name if that manager's phone is off hook.
Ring 	This icon appears on the Manager Status screen next to the name of the manager whose phone is ringing.

Table 4 *Call Status Icons (continued)*

Manager Call-state icon	What it does
Unknown 	This icon appears on the Manager Status screen next to the name of the manager whose state cannot be determined by the Cisco Unified Communications Manager Assistant. For example, a CTI failure may have occurred, or the manager may be a mobile manager who is not logged in yet.
MWI (Message waiting indicator)	“MWI” appears on the Manager Status screen next to the name of the manager if the manager has a voice mail waiting.


Handling Calls and Performing Other Actions

[Table 5](#) describes the softkeys that appear on the Manager Status screen. The softkeys allow you to perform a different call-handling task.

Table 5 *Softkeys on the Assistant’s Phone*

Softkey	What it does
Select	Selects the highlighted manager from the list of managers and takes you to the Manager Settings screen (see Figure 6 page 42), where you can configure settings for the selected manager.
Answer	Answers an incoming call for the corresponding manager.
Exit	Exits the Manager Status screen and takes you to the Services menu page.
Redirect	Immediately diverts a ringing, connected or on-hold call to the corresponding manager (by default) or to another preset number. To set the divert target to a directory number, press AsstSett , then press Set Divert Target , then enter the number.
More	Shows the remaining available softkeys for the Manager Status screen.
TrnsfVM	Sends a ringing, connected, or on-hold call to the corresponding manager’s voice mailbox.

Table 5 *Softkeys on the Assistant's Phone (continued)*

Softkey	What it does
InterCom	Allows you to speak to a manager on an intercom line.
GoOffline	<p>Takes you offline. If there is another assistant configured for the manager, and if that assistant is online, then that assistant becomes the active assistant for this manager.</p> <p>If no other assistants are available, calls for the manager will not be filtered or diverted, and will all ring at the manager's phone.</p> <p> Note When the primary assistant goes offline or logs out, the manager's phone and call status are shown on the phone of the next available assistant, which becomes the primary assistant.</p>
AsstSett	Takes you to the Assistant Settings screen, where you configure various settings. See Table 7 page 46 for the fields you can configure.

How to Answer a Call Using Manager Assistant on the Phone

You can answer a call to a manager, which will display on the Manager Status page, in any of three ways:

- Press the **Answer** softkey on the Manager Status Page.
- Select the Line button of the ringing call or the speaker button.
- Exit the Cisco Unified Communications Manager Assistant screen and select the Answer button on the call-processing screen, which is the screen that is visible after you exit the Cisco Unified Communications Manager Assistant screen. The Call Processing screen shows the originating number of the call and contains the **Answer**, **Redirect** and **TrnsfVM** softkeys.



Note

Once you answer the call using any of these methods, the Cisco Unified Communications Manager Assistant screen is overwritten by the call-processing screen (if this screen is not already visible). At this point, use the softkeys on the call-processing screen as you would normally; Cisco Unified Communications Manager Assistant does not control these features.

Configuring Manager Settings

Figure 6 shows the Manager Settings screen, which appears when you select a manager from the list shown in the Manager Status screen (see Figure 5).

Table 6 describes how to set the fields in this screen.

Figure 6 *Manager Settings Screen*



Table 6 **Manager Settings Fields**


Softkey	What it does
Filter	<p>Toggles between On and Off. Change the setting of this field by highlighting the field and pressing Select. If this field is set to On, then the filter rules configured in the Filter Mode field apply.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p>Note To configure filters for a manager, you must use the Assistant Console application. For more information, see How to Create Filter Lists for a Manager, page 72.</p> </div>
Filter Mode	<p>Toggles between Exclusive and Inclusive. Change the setting of this field by highlighting the field and pressing Select.</p> <ul style="list-style-type: none"> • Exclusive—Calls matching the phone numbers in the filter list are sent to the assistant; the remaining calls are sent to the manager. • Inclusive—Calls matching the phone numbers in the filter list are sent to the manager; the remaining calls are sent to the assistant. <p>Permitted wildcard characters are X for a single digit and * for a string of digits at the beginning or end of a number only.</p>
Do Not Disturb	<p>Turns off the ringer on the manager’s phone. This can be performed on a per-manager basis.</p>
Divert Calls	<p>Toggles between On and Off. Change the setting of this field by highlighting the field and pressing Select. If this field is set to On, Cisco Unified Communications Manager Assistant sends a ringing, connected or held call to the manager or to another preset number (a number you specify by selecting the Set Divert Target field).</p>

Table 6 **Manager Settings Fields (continued)**

Softkey	What it does
Set Divert Target	The number to which calls are diverted, if the Divert Calls field is On . Default: Calls are diverted to the corresponding manager's phone unless another Directory Number is configured here.
Alert Tone	Toggles between On and Off . Change the setting of this field by highlighting the field and pressing Select . If this field is set to On in a proxy-line environment, calls to the manager generate an audio alert on the manager's phone.

Configuring Assistant Settings

Figure 7 shows the Assistant Settings screen, which displays when you press the **AsstSett** softkey on the Manager Status screen (see Figure 5). The Assistant Settings screen lets you configure such items as divert targets and sorting for the Manager Status screen.

Table 7 describes how to set the fields on this screen.

Table 8 describes how to use the softkeys on this screen.

Figure 7 Assistant Settings




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Table 7 Assistant Settings Fields

Field	What it does
CallPlaneOverWrite (Enable/Disable)	<p>Toggles between Enabled and Disabled. Change the setting of this field by highlighting the field and pressing Select. Enabling this flag sends real-time updates while you are on a call.</p> <p>It is useful to check if a manager's status is busy or idle before diverting a call to that manager. With this flag enabled, a change in a manager's status displays while you are on a call.</p>
SmartSorting (Enable/Disable)	<p>Toggles between Enabled and Disabled. Change the setting of this field by highlighting the field and pressing Select. When this flag is enabled, the Manager Status screen is sorted based on new call events.</p> <p>For the hierarchy of how the managers list is sorted, see Information Display on Manager Status Screen, page 38.</p> <p>If this flag is not enabled, the Manager Status screen is static.</p>
SetDivertTarget	<p>When the Divert All field is set to On for a manager (see Figure 6 page 42), incoming calls to that manager get diverted to the divert target, which is either the currently selected manager (by default) or a Directory Number.</p> <p>To divert calls to a Directory Number, enter the number in the SetDivertTarget field; to change a Directory number, edit the SetDivertTarget field.</p>

Table 8 *Assistant Settings Softkeys*

Field	What it does
Select	Pressing this button changes the settings for the two toggled fields on this screen— CallPLaneOverWrite and SmartSorting . If you highlight the Set Divert Target field and press Select , you are taken to the screen to configure the divert target number.
StpUpdt/StrUpdt	<p>The Manager Status screen, by default, refreshes when a change in a manager’s status occurs or when there is a new call for a manager. The StpUpdt button prevents this automatic refresh.</p> <p>A situation in which you may want to use this button would be if, for example, you have 33 managers you are supporting and you would like to change the setting for the 20th manager.</p> <p>To change the settings of this manager, you would scroll down your list of managers on the Manager Status screen, highlight the 20th name, then press Select.</p> <p>However, if your screen gets updated during this process, you would lose your place in the scroll list as well as missing potentially important status updates. Therefore, to avoid refreshes from occurring in such a situation, press the StpUpdt button.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p>Note To re-invoke the automatic updates, press the StrUpdt button.</p> </div>
Exit	Exits out of the Assistant Settings screen and returns you to the Manager Status screen.
LogOut	Logs you out of the IPMA service. You will need to re-login to the service once you log out.

How to Customize the Distinctive Ringing Feature

Distinctive Ringing allows you to associate a unique audible ring type with each of your phone lines. You can associate a unique ring type with your manager's proxy line to quickly distinguish between your incoming calls and your manager's incoming calls.

Use the following procedure to customize the Distinctive Ringing feature directly on your phone.

Procedure

- Step 1** Press the **Settings** button on your Cisco Unified IP Phone.
- Step 2** Use the **Navigation** button to select **Ring Type** from the Settings menu (or press **2** on your phone key pad).
Each of the lines on your phone, along with its selected ring type, is displayed on your phone's LCD screen. Initially, all of these lines use the default ring type.
- Step 3** To change the ring type for a line, use the **Navigation** button to select the line, then press the **Select** softkey.



Note

To identify which manager proxy line on your phone is associated with a particular manager, look at the My Calls panel of the Assistant Console application. This is the area where manager proxy lines and manager names are displayed. (A manager's proxy line is the line on which you receive incoming calls for that manager.)

- Step 4** Use the **Navigation** button to scroll through the list of available ring types for the selected line. To hear a sample of any ring type, select the ring type, then press the **Play** softkey.
- Step 5** To associate a new ring type, press the **Select** and **Ok** softkeys.
- Step 6** Repeat Steps 3 - Step 5 to customize the ring type for another selected line.
- Step 7** Press the **Exit** softkey to exit the Ring Type menu.
-

For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Shared-line Mode

Cisco Unified Communications Manager Assistant enhances the functionality of your phone and allows you and your assistant to handle calls more effectively. Your system administrator has chosen your Cisco Unified Communications Manager Assistant configuration to operate in either shared-line mode or proxy-line mode. In shared-line mode, you and your assistant are assigned the same directory number. Your assistant uses the shared number to handle calls on your behalf. In proxy-line mode, you are assigned a directory number and your assistant is assigned an alternate directory number to use as a proxy. Your assistant uses the proxy number to handle calls on your behalf. Before you begin, you should identify which mode your system administrator has chosen. See [“Introduction to Cisco Unified Communications Manager Assistant.”](#)

Cisco Unified Communications Manager Assistant provides the following features for managers who are configured for shared-line mode:

- Enhanced call-handling features on your Cisco Unified IP Phone—Provides new softkeys and a status window on your phone’s LCD screen.
- Intercom capabilities—Allows you to place intercom calls to your assistant and receive intercom calls from your assistant.
- Web-based feature configuration—Allows you to customize the Divert target using the Manager Configuration window. Alternately, your assistant can configure this feature on your behalf from the Assistant Console.

See the following topics for more information:

- [How to Identify the Mode on a Manager’s Phone, page 3](#)
- [How to Divert and Transfer Calls, page 50](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 51](#)
- [How to Mute the Ringer on Your Phone, page 52](#)
- [For Managers—How to Access Manager Configuration, page 69](#)

Using Cisco Extension Mobility

Procedure

To use Cisco Unified Communications Manager Assistant with Cisco Extension mobility, follow these steps:

-
- Step 1** Log in to Cisco Extension mobility.
- Step 2** Select Assistant Service in the Services menu.
-

Refer to the *Cisco Unified IP Phone 7960G and 7940G Phone Guide* for more information about the Cisco Extension Mobility feature.

Related Topics

- [How to Divert and Transfer Calls, page 50](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 51](#)
- [How to Mute the Ringer on Your Phone, page 52](#)

How to Divert and Transfer Calls

For Managers

You can use Cisco Unified Communications Manager Assistant softkeys on your phone to divert, transfer, and otherwise handle active calls.

This section covers the following topics:

- [How to Immediately Redirect an Incoming Call to Another Number, page 50](#)
- [How to Transfer a Call to Voice Messaging Service, page 51](#)

How to Immediately Redirect an Incoming Call to Another Number

For Managers

Press the **Redirect** softkey to divert a call that is ringing, connected, or on hold from your phone to another phone number that has been set up as the divert target. You or your assistant can change this target from the Manager Configuration window.

Related Topics

- [Using Cisco Extension Mobility, page 50](#)

- [How to Divert and Transfer Calls, page 50](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 51](#)
- [How to Configure the Divert Target for a Manager, page 71](#)

How to Transfer a Call to Voice Messaging Service

For Managers

Press the TrnsfVM softkey to immediately send a call from your phone to your voice messaging service. You can transfer a call on hold to your voice messaging service.

Related Topics

- [Using Cisco Extension Mobility, page 50](#)
- [How to Divert and Transfer Calls, page 50](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 51](#)
- [How to Mute the Ringer on Your Phone, page 52](#)

How to Use the Intercom Feature to Speak to an Assistant

The Intercom feature is an optional feature and allows you to speak to your assistant over an intercom line. It is configured by your system administrator.



Note If the intercom feature is not available on your phone, contact your system administrator.

Cisco Unified IP Phones 7941G, 7941G-GE, 7961G, 7961G-GE, 7970G, and 7971G-GE

To place an intercom call on your Cisco Unified IP Phone, press the **Intercom** speed dial button that corresponds to your assistant. The current active assistant is the target for your intercom call.

If there are no active assistants when you log in, there will be no target for your intercom call.

When you initiate an intercom call, your assistant's speakerphone answers automatically. You can then speak using your phone's speakerphone, headset, or handset. To speak to you, the assistant must press the InterCom button on the assistant phone.

To end the intercom call, hang up the phone (or push the speaker or headset button).

Cisco Unified IP Phones 7940G and 7960G

To place an intercom call on your Cisco Unified IP Phone, press the **Intercom** speed dial button that corresponds to your assistant.

If your assistant is not on another call when you initiate an intercom call, your speakerphone and your assistant's speakerphone will open simultaneously. You can then talk using your phone's speakerphone, headset, or handset. This is the case when your assistant places an intercom call to you, as well.

If your assistant is busy on another call when you initiate an intercom call, the intercom call will ring on the assistant's phone and must be answered manually. This is also the case when your assistant places an intercom call to you at a time when you are on another call.

To end the intercom call, hang up the phone (or push the speaker or headset button).

Related Topics

- [Using Cisco Extension Mobility, page 50](#)
- [How to Divert and Transfer Calls, page 50](#)
- [How to Mute the Ringer on Your Phone, page 52](#)

How to Mute the Ringer on Your Phone

For Managers

In order to mute the ringer on your phone, press the DND softkey to toggle the Do Not Disturb feature on or off.



Note If the DND feature is not available on your phone, contact your system administrator.

When this feature is on, the ringer is disabled on your Cisco Unified IP Phone. The DND feature disables the ringer for all lines on the phone.



Note Intercom is not affected by the DND feature.

The Do Not Disturb feature is represented by a bell icon in the Cisco Unified Communications Manager Assistant status window on the LCD screen of your Cisco Unified IP Phone. A crossed-out bell icon indicates that the feature is on and the ringer on your phone is disabled. Your phone will not ring, but your assistant's phone will ring. A bell icon indicates that the feature is off and the ringer is enabled.

The initial default setting is off.

Related Topics

- [Using Cisco Extension Mobility, page 50](#)
- [How to Divert and Transfer Calls, page 50](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 51](#)

For Managers—How to Use Your Phone with Cisco Unified Communications Manager Assistant in Proxy-Line Mode

Cisco Unified Communications Manager Assistant enhances the functionality of your phone and allows you and your assistant to handle calls more effectively. Your system administrator has chosen your Cisco Unified Communications Manager Assistant configuration to operate in either shared-line mode or proxy-line mode. In shared-line mode, you and your assistant are assigned the same directory number. Your assistant uses this shared number (line) to handle calls on your behalf. In proxy-line mode, you are assigned a directory number and your assistant is assigned an alternate directory number to use as a proxy. Your assistant uses the proxy number (line) to handle calls on your behalf. Before you begin, you should identify which mode your system administrator has chosen. See [“Introduction to Cisco Unified Communications Manager Assistant.”](#)

Cisco Unified Communications Manager Assistant provides the following features for managers who are configured for proxy-line mode:

- Call-routing—Selectively redirects incoming calls to your phone or to your assistant’s phone based on your custom filter list.
- Enhanced call-handling and monitoring features on your Cisco Unified IP Phone—Provides new softkeys and a status window on your phone’s LCD screen.
- Intercom capabilities—Allows you to place intercom calls to your assistant and receive intercom calls from your assistant.
- Web-based feature configuration—Allows you to customize some manager features, such as the divert target, using the Manager Configuration window. Alternately, your assistant can configure these features on your behalf from the Assistant Console.

Related Topics

- [How to Identify the Mode on a Manager’s Phone, page 3](#)
- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)
- [How to Mute the Ringer on Your Phone, page 67](#)
- [For Managers—How to Access Manager Configuration, page 69](#)

Getting Started—for Managers

These topics can help you get started with Cisco Unified Communications Manager Assistant:

- [Using Cisco Extension Mobility, page 54](#)
- [Understanding Assistant Selection, page 54](#)
- [Using the Status Window, page 55](#)
- [Using the Manager Status Menu on Your Phone, page 59](#)

Using Cisco Extension Mobility

Procedure

To use Cisco Unified Communications Manager Assistant with Cisco Extension mobility:

-
- Step 1** Log in to Cisco Extension Mobility.
- Step 2** Select Assistant Service in the services menu.
-

Refer to the *Cisco Unified IP Phone 7960G and 7940G Phone Guide* for more information about the Cisco Extension Mobility feature.

Understanding Assistant Selection

As a manager, you are automatically logged in to the Cisco Unified Communications Manager Assistant feature unless you are configured to use Cisco Extension Mobility.

To handle your calls, your assistant must log in to the Cisco Unified Communications Manager Assistant Console application and must remain online. If your active assistant logs out or goes offline, Cisco Unified Communications Manager Assistant will attempt to assign another assistant to you.

Identifying your active assistant

Your *active* assistant is the person who is currently handling calls on your behalf.

If you have multiple assistants, you might want to identify which assistant is currently active. To do so, press the **Services** button on your phone and select Assistant Service. Item 3 identifies your active assistant.

Assigning your default assistant

Whenever possible, Cisco Unified Communications Manager Assistant assigns your *default* assistant to serve as your active assistant. If your default assistant is unavailable (offline or logged out), Cisco Unified Communications Manager Assistant assigns another assistant until your default assistant logs in or restores online availability.

You (or your assistant) can choose your default assistant from the Manager Configuration window. For details, see [How to Assign a Default Assistant to a Manager, page 71](#).

Changing assistants

If you have multiple assistants and more than one of them is logged in and online, you can override automatic selection by manually choosing your active assistant.

Select item 3 from the Manager Status menu on your phone to see a list of available assistants. If multiple assistants are available, select another assistant to serve as your active assistant. Exit from the menu when you are done.

When your assistants are not available

If all of your assistants are unavailable, the Assistant icon (left-most icon) in the Manager Status Menu on your phone appears crossed out. Your call-handling support will resume as soon as one of your assistants logs in.

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)
- [How to Mute the Ringer on Your Phone, page 67](#)

Using the Status Window

For Managers

The Manager Status Menu appears on the LCD screen of your Cisco Unified IP Phone.

There are two areas within the Manager Status menu:

- Assistant Watch area—The top portion of the status window displays the caller ID and the elapsed time for a call that is being handled on your behalf by an assistant. See [Table 9](#) for details.
- Assistant and Features area of Cisco Unified IP Phones 7940G and 7960G—The largest portion of the status window displays icons to indicate the presence of an active assistant and the on/off status of your features. See [Table 10](#) for details.

- Assistant and Features area of Cisco Unified IP Phones 7941G, 7941G-GE, 7961G, 7961G-GE, 7970G, 7971G-GE—The largest portion of the status window displays icons to indicate the presence of an active assistant and the on/off status of your features. See [Table 11](#) for details.

Table 9 *Assistant Watch messages in the Manager Status Menu*

Message	Meaning
“Assistant Watch - ON”	Assistant Watch is on but there are no connected or incoming calls being redirected to your assistant at the moment.
“Call from” followed by caller ID	An incoming call was redirected to your assistant and is currently ringing on your assistant’s phone. You can intercept the call now.
Caller ID and a timer	The incoming call has been answered by the assistant. The timer begins once the assistant answers (or otherwise handles) the call.
“Assistant Watch - OFF”	Assistant Watch is off. To set it to on, press the SetWtch softkey.
“Filtering Down”	Call Filtering feature is unavailable at this time.

Table 10 *Assistant and Feature icons in the Manager Status Menu of Cisco Unified IP Phones 7940G and 7960G*



Feature	Description
Assistant Available 	The assistant icon resembles a person and is located on the left side of your status window. The icon indicates that an active assistant is ready to take your calls.
Assistant Unavailable 	The assistant unavailable icon resembles a person with a line across it. This indicates that all of your assistants are unavailable. To identify your active assistant, press the Services button on your Cisco Unified IP Phone, then select Assistant Service.

Table 10 *Assistant and Feature icons in the Manager Status Menu of Cisco Unified IP Phones 7940G and 7960G (continued)*







Feature	Description
Call Filter Enabled 	A mesh-filled circle indicates that filtering is <i>on</i> .
Call Filter Disabled 	A hollow circle indicates that filtering is <i>off</i> . To toggle the filter off and on, select Filter from the Manager Status menu. You can configure call filtering from the Manager Configuration web page.
Do Not Disturb Enabled 	A crossed-out bell indicates that the feature is <i>on</i> (ringer is disabled).
Do Not Disturb Disabled 	A bell indicates that the feature is <i>off</i> (ringer is enabled). To enable/disable the Do Not Disturb feature and turn your ringer on or off, press the DND softkey.
Divert All Enabled 	An arrow deflected by a barrier indicates that the feature is <i>on</i> (calls are being redirected away from your phone);
Divert All Disabled 	A straight arrow indicates that the feature is <i>off</i> (calls are being directed to your phone). To enable/disable the Divert All feature, press the DivAll softkey. The initial default target for this feature is your selected assistant. You can change the target from the Manager Configuration web page.

Table 11 Assistant and Feature icons in the Manager Status Menu of Cisco Unified IP Phones 7941G, 7941G-GE, 7961G, 7961G-GE, 7970G, and 7971G-GE









Feature	Description
Assistant Available 	The assistant icon resembles a person and is located on the left side of your status window. The icon indicates that an active assistant is ready to take your calls.
Assistant Unavailable 	The assistant-unavailable icon resembles a person with a line across it. This indicates that all of your assistants are unavailable. To identify your active assistant, press the Services button on your Cisco Unified IP Phone, then select Assistant Service.
Call Filter Enabled 	A window with a pass-through green arrow and deflected red arrow indicates that filtering is <i>on</i> .
Call Filter Disabled 	A crossed-out window with a pass-through green arrow and deflected red arrow indicates that filtering is <i>off</i> . To toggle the filter off and on, select Filter from the Manager Status menu. You can configure call filtering from the Manager Configuration web page.
Do Not Disturb Enabled 	A crossed-out bell indicates that the feature is <i>on</i> (ringer is disabled).
Do Not Disturb Disabled 	A bell indicates that the feature is <i>off</i> (ringer is enabled). To enable/disable the Do Not Disturb feature and turn your ringer on or off, press the DND softkey.

Table 11 Assistant and Feature icons in the Manager Status Menu of Cisco Unified IP Phones 7941G, 7941G-GE, 7961G, 7961G-GE, 7970G, and 7971G-GE (continued)

Feature	Description
Divert All Enabled 	An arrow deflected by a barrier indicates that the feature is <i>on</i> (calls are being redirected away from your phone).
Divert All Disabled 	A crossed-out arrow deflected by a barrier indicates that the feature is <i>off</i> (calls are being directed to your phone). To enable/disable the Divert All feature, press the DivAll softkey. The initial default target for this feature is your selected assistant. You can change the target from the Manager Configuration web page.

Tips

- The status window is not visible when you are using your phone to place or receive calls.
- Press the **SetWtch** softkey to toggle Assistant Watch off and on.

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)
- [How to Mute the Ringer on Your Phone, page 67](#)

Using the Manager Status Menu on Your Phone

For Managers

To open the Manager Status menu on your phone, press the **Services** button and choose Assistant Service. [Table 12](#) describes Manager Status menu items and associated tasks.

Table 12 Manager Status Menu Items and Associated Tasks

Manager Status menu item	What it does
1 Filter	Toggles call filtering off and on.

Table 12 *Manager Status Menu Items and Associated Tasks (continued)*

	Manager Status menu item	What it does
2	Filter Mode	Toggles between Inclusive or Exclusive filters.
3	Assistant	Displays your active assistant and other available assistants.

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)
- [How to Mute the Ringer on Your Phone, page 67](#)

Configuring an Alert Tone for Incoming Calls

Incoming calls appear on the manager’s phone screen, but ring only on the assistant’s phone.

Procedure

To add an audio alert to incoming calls on the manager’s phone, follow these steps:

-
- Step 1** Press the **Services** button.
- Step 2** Select and set **Alert Tone**.
- Step 3** Set **Alert Tone** to **On**.
- The alert will sound once per call.
-

The alert tone does not play for incoming calls when:

- The alert tone for your phone is turned off from the assistant’s phone or assistant console.
- The **Assistant Watch** feature is off.
- You set calls to automatically redirect to your assistant.

How to Intercept, Redirect, and Transfer Calls

For Managers

You can use Cisco Unified Communications Manager Assistant softkeys on your phone to intercept, redirect, transfer, and otherwise handle an active call.

This section covers the following topics:

- [How to Intercept a Call that is Ringing on the Assistant’s Phone](#), page 61
- [How to Immediately Redirect an Incoming Call to Another Number](#), page 61
- [How to Redirect All Calls to Another Number](#), page 62
- [How to Transfer a Call to Voice Messaging Service](#), page 63

How to Intercept a Call that is Ringing on the Assistant’s Phone

For Managers

Press the **Intrcpt** softkey on your Cisco Unified IP Phone to intercept a call that is ringing on your assistant’s phone and to redirect the call to your own phone.

To successfully intercept the call, you must press the **Intrcpt** softkey before your assistant answers the call; you cannot intercept calls that have already connected.



Tip

When a call for you is ringing on your assistant’s phone, you can see the text “Call from” and the caller ID in the Assistant Watch portion of the status window on your phone.

Related Topics

- [Getting Started—for Managers](#), page 54
- [How to Intercept, Redirect, and Transfer Calls](#), page 61
- [How to Use Call Filtering](#), page 63
- [How to Use the Intercom Feature to Speak to an Assistant](#), page 66
- [How to Mute the Ringer on Your Phone](#), page 67

How to Immediately Redirect an Incoming Call to Another Number

For Managers

Press the **Redirect** softkey to redirect a call that is ringing, connected, or on hold from your phone to another phone.

By default, the Redirect feature redirects calls to your selected assistant. However, you or your assistant can substitute any phone number as the divert target.

Tips

- If the assistant is the designated divert target and if you have Assistant Watch on, you can verify that the call has been redirected to your assistant by looking at the status window on your LCD screen.
- The Redirect feature and the Divert All (DivAll) feature share the same divert target. You or your assistant can change this target from the Manager Configuration window.

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)
- [How to Configure the Divert Target for a Manager, page 71](#)

How to Redirect All Calls to Another Number

For Managers

Press the **DivAll** softkey to toggle the Divert All (DivAll) feature on or off. When this feature is on, DivAll redirects your incoming calls to another phone.

Unlike Redirect, which you invoke on a call-by-call basis, DivAll allows you to redirect all future incoming calls until you set the feature to off.

By default, the DivAll target is your selected assistant. However, you or your assistant can substitute any phone number as the divert target. For example, if you plan to be away from the office and you still want to receive your calls, you can set the Divert All target to your cell phone number.

Tips

- An icon in the Manager Status menu indicates whether the DivAll feature is on or off. A deflected arrow indicates that the feature is on; a straight arrow indicates that the feature is off.
- DivAll applies to all your lines that can be managed by your assistant; it cannot redirect the incoming calls that you receive on a personal line that your assistant does not have access to, or on an intercom line.
- The DivAll feature and the Redirect feature share the same divert target. You or your assistant can change this target from the Manager Configuration window.

- If you have both call filtering and DivAll enabled, Cisco Unified Communications Manager Assistant first applies *call filtering* to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, Cisco Unified Communications Manager Assistant applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.
- If you configure call forward all on your phone, all your incoming calls will be forwarded to the call forward number that you entered. Your calls will not be filtered to your assistant and they will not be redirected to your divert target.

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)
- [How to Configure the Divert Target for a Manager, page 71](#)

How to Transfer a Call to Voice Messaging Service

For Managers

Press the **TrnsfVM** softkey to immediately send a call from your phone to your voice messaging service. You can transfer a call on hold to your voice messaging service.

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)
- [How to Mute the Ringer on Your Phone, page 67](#)

How to Use Call Filtering

For Managers

Call filtering selectively redirects your incoming calls to your assistant, based on the caller ID and the following configurations and settings:

- Filter Mode
- Filter Lists

- Filter on/off status

Table 13 provides details about each of these filter settings.



Note The initial default settings are such that Inclusive call filtering is on and filter lists are empty; therefore all of your incoming calls are redirected to your assistant. To customize filtering, see [How to Create Filter Lists for a Manager, page 72](#).

In order for your assistant to handle your calls, call filtering must be enabled. If you have both call filtering and Divert All (DivAll) enabled, Cisco Unified Communications Manager Assistant first applies *call filtering* to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, Cisco Unified Communications Manager Assistant applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.

For example, you can set up a inclusive filter to receive only family calls. All other calls will be handled by your assistant. If you have plans to be away from your office, you can then set the DivAll target to your cell phone number, enable Divert All, and receive the calls from your family on your cell phone. Your assistant will still receive all other calls.



Note When you configure call forward all on your phone, all your incoming calls will be forwarded to the call forward number that you entered. Your calls will not be filtered to your assistant and they will not be redirected to your divert target.

Table 13 Call Filtering Settings

Setting	Purpose	Where to find it	Notes
Filter Mode	<p>Use the filter mode setting to toggle between <i>Inclusive</i> and <i>Exclusive</i> filter lists.</p> <p>Inclusive filtering—In this mode, Cisco Unified Communications Manager Assistant sends incoming calls that match numbers in your Inclusive filter list to <i>you</i>; the remainder are redirected to your assistant.</p> <p>Exclusive filtering—In this mode, Cisco Unified Communications Manager Assistant redirects incoming calls that match numbers in your Exclusive filter list to your <i>assistant</i>; the remainder are sent to you.</p>	<p>Toggle between Inclusive and Exclusive filter lists from the Manager Status menu on your phone’s LCD screen.</p>	<p>By initial default, the Inclusive filter is active.</p> <p>Assistants can control the filter mode on your behalf from the Assistant Console.</p>
Filter Lists	<p>Filter lists consist of one or more phone numbers (partial or entire). When you get a new call and filtering is on, Cisco Unified Communications Manager Assistant compares the caller ID to the numbers in your active list. Depending on whether the numbers match and which filter list is active (Inclusive or Exclusive), Cisco Unified Communications Manager Assistant then routes the call to you or to your assistant.</p>	<p>Create filter lists from the Manager Configuration window. Choose the Inclusive or Exclusive Filter tab.</p>	<p>Your assistant can set up filter lists for you. By initial default, filter lists are empty.</p>
Filter on/off status	<p>The filter on/off setting toggles call filtering on or off.</p> <p>When the feature is on, all of your incoming calls are intercepted and redirected according to filter settings.</p>	<p>Toggle filtering on and off from the Manager Status menu on your phone’s LCD screen. Press the Services button and choose Assistant Service, then select Filter.</p>	<p>The initial default setting for the filter is on.</p>

Tip

- A circle icon in the Manager Status menu indicates whether the call filtering feature is on or off. A mesh-filled circle icon indicates on; a hollow circle indicates off.

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)
- [How to Create Filter Lists for a Manager, page 72](#)

How to Use the Intercom Feature to Speak to an Assistant

The Intercom feature is an optional feature and allows you to speak to your assistant over an intercom line. It is configured by your system administrator.



Note If the intercom feature is not available on your phone, contact your system administrator.

Cisco Unified IP Phones 7941G, 7941G-GE, 7961G, 7961G-GE, 7970G, and 7971G-GE

To place an intercom call on your Cisco Unified IP Phone, press the **Intercom** speed dial button that corresponds to your assistant.

When you initiate an intercom call, your assistant's speakerphone answers automatically. You can then speak using your phone's speakerphone, headset, or handset. To speak to you, the assistant must press the **Intercom** button on the assistant phone.

To end the intercom call, hang up the phone (or push the speaker or headset button).

There are a number of possible outcomes when you initiate an intercom call in proxy-line mode:

- If a default assistant is configured *and* available, that assistant is the target for your call.
- If a default assistant is configured but unavailable, the next available assistant becomes the target for your call.
- If a default assistant is configured but unavailable, *and* there are no active assistants at the time you log in, the default assistant remains the target of your intercom call.
- If a default assistant is *not* configured, the current active assistant becomes the target for your call.
- If a default assistant is *not* configured, and the current active assistant goes offline while you are logged in, one of the following happens:
 - The next available assistant becomes the target for your intercom call.
 - If there are no other assistants available, the assistant that went offline remains the target for your call.
- If a default assistant is *not* configured, and there are *no* active assistants at the time you log in, there is no target for your intercom call.

Cisco Unified IP Phones 7940G and 7960G

To place an intercom call on your Cisco Unified IP Phone, press the **Intercom** speed dial button that corresponds to your assistant.

If your assistant is not on another call when you initiate an intercom call, your speakerphone and your assistant's speakerphone will open simultaneously. You can then talk using your phone's speakerphone, headset, or handset. This is the case when your assistant places an intercom call to you, as well.

If your assistant is busy on another call when you initiate an intercom call, the intercom call will ring on the assistant's phone and must be answered manually. This is also the case when your assistant places an intercom call to you at a time when you are on another call.

To end the intercom call, hang up the phone (or push the speaker or headset button).

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Mute the Ringer on Your Phone, page 67](#)

How to Mute the Ringer on Your Phone

For Managers

In order to mute the ringer on your phone, press the DND softkey to toggle the Do Not Disturb feature on or off.



Note If the DND feature is not available on your phone, contact your system administrator.

When this feature is on, the ringer is disabled on your Cisco Unified IP Phone. The DND feature disables the ringer for all lines on the phone.



Note Intercom is not affected by the DND feature.

The Do Not Disturb feature is represented by a bell icon in the Manager Status menu on the LCD screen of your Cisco Unified IP Phone. A crossed-out bell icon indicates that the feature is on and the ringer on your phone is disabled. Your assistant's phone will continue to ring. A bell icon indicates that the feature is off and the ringer is enabled.

The initial default setting is off.

Tip

- This feature does not affect call filtering.

Related Topics

- [Getting Started—for Managers, page 54](#)
- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Use Call Filtering, page 63](#)
- [How to Use the Intercom Feature to Speak to an Assistant, page 66](#)

How to Configure Manager Features

Both managers and assistants can modify manager preferences from the Manager Configuration window. Managers can access this window from a website; assistants can access it from the Assistant Console.

Your system Administrator has chosen your Cisco Unified Communications Manager Assistant configuration to operate in either a shared-line mode or a proxy-line mode. If your system administrator has configured Cisco Unified Communications Manager Assistant to operate in proxy-line mode, you will be able to assign a default assistant, configure a divert target, and create filter lists. If your system administrator has configured Cisco Unified Communications Manager Assistant to operate in shared-line mode, you will only be able to configure a divert target. In shared-line mode, you will not be able to assign a default assistant or set up filters to selectively filter calls to an assistant. The initial default settings allow managers to use Cisco Unified Communications Manager Assistant without first configuring preferences.

Related Topics

- [Description of Shared-line Mode and Proxy-line Mode, page 1](#)
- [How to Access Manager Configuration, page 69](#)
- [How to Assign a Default Assistant to a Manager, page 71](#)
- [How to Configure the Divert Target for a Manager, page 71](#)
- [How to Create Filter Lists for a Manager, page 72](#)

How to Access Manager Configuration

Refer to one of the following topics:

- [For Managers—How to Access Manager Configuration, page 69](#)
- [For Assistants—How to Access Manager Configuration, page 70](#)

For Managers—How to Access Manager Configuration

Managers will access the Manager Configuration page using a website. You can obtain the URL from your system administrator.

Procedure

- Step 1** On a computer running Microsoft Windows 2000, open a Microsoft Internet Explorer (Microsoft IE) browser.
The browser version must be 5.5 or higher.
- Step 2** Open the URL that was provided by your system administrator. The URL should look like this: `http://<ip-address>/ma/desktop/maLogin.jsp`
A pop-up window will ask you if you want to install Cisco Unified Communications Manager Assistant software.
- Step 3** Click the **check box** to indicate agreement with the following text: “Always trust content from Cisco Systems Inc.” Then click **Yes**.
The Login page appears.
- Step 4** Enter your user name and password (as provided by your system administrator) and click **Sign in**.
The Manager Configuration window appears.
- Step 5** When you are ready to log out, close the browser window. If necessary, repeat Step 3.
-

Related Topics

- [How to Assign a Default Assistant to a Manager, page 71](#)
- [How to Configure the Divert Target for a Manager, page 71](#)
- [How to Create Filter Lists for a Manager, page 72](#)

For Assistants—How to Access Manager Configuration

Assistants can access the Manager Configuration window from the Assistant Console.

To access the window for a particular manager, right-click anywhere in the row for that manager in the My Managers panel of the Assistant Console. Then choose **Configure** from the pop-up menu.

To access the window for all of your managers, choose **Manager > Configuration** from the menu bar. If necessary, choose the manager for whom you want to configure features from the Manager drop-down list.

Related Topics

- [How to Assign a Default Assistant to a Manager, page 71](#)
- [How to Configure the Divert Target for a Manager, page 71](#)
- [How to Create Filter Lists for a Manager, page 72](#)

How to Assign a Default Assistant to a Manager

You can identify one of a manager's configured assistants as the *default* assistant.

Whenever possible, Cisco Unified Communications Manager Assistant assigns the default assistant as the manager's active assistant. If the default assistant is not logged in, Cisco Unified Communications Manager Assistant will assign another assistant (if one is available) to serve as the active assistant. Once the default assistant logs in, Cisco Unified Communications Manager Assistant will switch assistants so that the default assistant is active and handling calls.

Procedure

- Step 1** From the Manager Configuration window, click the **Default Assistant** tab (if necessary) to display the Default Assistant Selection window.
- Step 2** Select the appropriate assistant from the assistant drop-down menu.
- Step 3** Save your changes.
-

Related Topics

- [How to Access Manager Configuration, page 69](#)
- [How to Configure the Divert Target for a Manager, page 71](#)
- [How to Create Filter Lists for a Manager, page 72](#)

How to Configure the Divert Target for a Manager

Managers using Cisco Unified Communications Manager Assistant in proxy-line mode can use the Divert All (DivAll) and Redirect (Redirect) features to send calls to the assistant or to another phone number (known as a *target*). The DivAll feature and the Redirect feature share the same Divert target.

Managers using Cisco Unified Communications Manager Assistant in shared-line mode can set up a Divert target and forward calls as the calls come in by using the **Redirect** softkey. The divert screen automatically displays when you log in.

By initial default, the Divert target is the manager's active assistant. Managers and assistants can use the procedure below to change this target.

Procedure

- Step 1** From the Manager Configuration window, click the **Divert** tab to display the Divert Configuration window.
- Step 2** (Proxy-line mode only) Select **Directory Number** or **Assistant**.

Step 3 If you selected Directory Number, enter a valid phone number. Enter the number exactly as you would dial it from your office phone.

Step 4 Save your changes.

Related Topics

- [How to Intercept, Redirect, and Transfer Calls, page 61](#)
- [How to Access Manager Configuration, page 69](#)
- [How to Assign a Default Assistant to a Manager, page 71](#)
- [How to Create Filter Lists for a Manager, page 72](#)

How to Create Filter Lists for a Manager

Filter lists allow managers or assistants to customize the manager's call filtering feature.

By default, filter lists are empty. Add numbers to a filter list to customize it. Choose a filter mode to toggle between *Inclusive* or *Exclusive* filter lists:

- **Inclusive**—Calls that match the numbers in the Inclusive filter list are sent to the *manager*; the remainder are redirected to the active assistant.
- **Exclusive**—Calls that match the numbers in the Exclusive filter list are redirected to the *assistant*; the remainder are sent to the manager.

Cisco Unified Communications Manager Assistant compares the caller ID of the incoming call to the phone number(s) in the active filter list.

For example, if you add the phone number 54321 to a manager's Inclusive filter list, every incoming call placed to the manager's office phone from 54321 will be routed to the manager (not to the assistant) if Inclusive filtering is on.

Or, if you add the number 54xxx to a manager's Exclusive filter list, every incoming call from a phone line with a five digit number that begins with 54 will be routed to the assistant (and not to the manager) if Exclusive filtering is on.



Note Only one filter mode (Inclusive or Exclusive) can be active at any given time. Managers can toggle between filter modes from the Cisco Unified Communications Manager Assistant menu on their phones. Assistants can toggle between filter modes for a manager from the Assistant Console.

Filter lists can include the following wildcards:

- **x**—Use x to replace a *single* digit anywhere in the filter. For example, “123x5” represents five-digit phone numbers, where the fourth digit is 0 - 9. You can use an upper-case or lower-case x.

- *—Use * to replace *multiple* digits at the beginning or end of the filter. For example, “5*” represents phone numbers of any length that begin with 5.

Besides wildcards, filter lists can contain hyphens (-), periods (.), and blank spaces.



Tip Filter lists can be empty. By initial default, the filter is enabled and the Inclusive filter list is empty. This means that all of a manager’s incoming calls are redirected to the assistant.

Managers—Activate your filter lists from your phone. To do so, open the Cisco Unified Communications Manager Assistant menu on your phone. Press 1 to toggle the Filter feature on and off; press 2 to toggle between Inclusive and Exclusive filter modes.

Managers and assistants can use the following procedure to create filter lists.

Procedure

- Step 1** From the Manager Configuration window, click the **Inclusive** tab or the **Exclusive** tab to display the appropriate configuration window.
- Step 2** Enter a partial or complete phone number in the **Filter** field.
If you need help, click the **More Info** link to see example filters.
- Step 3** You can add, replace or delete filters:
- To add a new filter, enter a filter in the Filter field and click **add**.
The new filter will appear in the Filter List.
 - To replace an existing filter with a new one, select the existing filter that you want to modify in the Filter List. Change the filter as needed in the Filter field and click **replace**.
The modified filter will appear in the Filter List.
 - To delete a filter, select the filter in the Filter List and click **delete**.
The deleted filter will be removed from the Filter List.
- Step 4** Save your changes.
-

Tips

- If you have both call filtering and Divert All (DivAll) enabled, Cisco Unified Communications Manager Assistant first applies *call filtering* to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, Cisco Unified Communications Manager Assistant applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.
- A circle icon in the Cisco Unified Communications Manager Assistant status window indicates whether the call filtering feature is on or off. A mesh-filled circle icon indicates on; a hollow circle indicates off.

Related Topics

- [How to Use Call Filtering, page 63](#)
- [How to Access Manager Configuration, page 69](#)
- [How to Assign a Default Assistant to a Manager, page 71](#)
- [How to Configure the Divert Target for a Manager, page 71](#)

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OL-12452-01