



# Working with Cisco Unified CallManager Assistant

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You can use BAT to manage the Cisco Unified CallManager Assistant feature in Cisco Unified CallManager. BAT allows you to add IP phones for managers and assistants. See the following sections for information:

- [Configuring Phones in Proxy Line Mode for Cisco Unified CallManager Assistant, page 5-2](#)
- [Configuring Phones in Shared Line Mode for Cisco Unified CallManager Assistant, page 5-11](#)

You can add, update, and delete managers or assistants with their associations in bulk transactions. See the [Creating the CSV Data File for Manager-Assistant Associations, page 5-14](#).

The following topics explain the options for managing Cisco Unified CallManager Assistant with BAT:

- [Inserting Manager-Assistant Associations to Cisco Unified CallManager, page 5-19](#)
- [Deleting Manager-Assistant Associations from Cisco Unified CallManager, page 5-20](#)
- [Deleting Managers from Cisco Unified CallManager, page 5-22](#)
- [Deleting Assistants from Cisco Unified CallManager, page 5-25](#)
- [Generating Reports for Cisco Unified CallManager Assistant Managers and Assistants, page 11-13](#)

For more information related to Cisco Unified CallManager Assistant, refer to this documentation.

- *Cisco Unified CallManager Features and Services Guide*
- *Cisco Unified CallManager Assistant User Guide*

## Overview of Phones and Lines for Use with Cisco Unified CallManager Assistant

The Cisco Unified CallManager Assistant feature works with several Cisco Unified IP Phone models and device profiles. Cisco Unified CallManager Assistant provides two modes for configuring managers and assistants lines for use with Cisco Unified CallManager Assistant features.

- Proxy mode—The manager’s primary line is associated with a proxy line that has a different directory number on the assistant’s phone. See the [“Configuring Phones in Proxy Line Mode for Cisco Unified CallManager Assistant”](#) section on page 5-2.
- Shared line mode—The manager and assistant have a shared line on their phones that uses the same directory number and partition. See the [“Configuring Phones in Shared Line Mode for Cisco Unified CallManager Assistant”](#) section on page 5-11.

You can use BAT to set up the manager and assistant phones with either proxy lines or shared lines.

## Configuring Phones in Proxy Line Mode for Cisco Unified CallManager Assistant

To prepare for configuring manager and assistant phones with Cisco Unified CallManager Assistant proxy line support, you must complete the following tasks:

1. Cisco recommends that you use the Cisco Unified CallManager Assistant Configuration Wizard to set up and configure Cisco Unified CallManager Assistant requirements for your system. The wizard automatically creates the phone templates for Cisco Unified CallManager Assistant manager and

assistant, route points, partitions, translation patterns, and calling search space for the Cisco IP Manager Assistant service. To run the Cisco Unified CallManager Assistant Configuration Wizard, BAT and the wizard must be on the same server. Refer to the *Cisco Unified CallManager Features and Services Guide* for information about running the Cisco Unified CallManager Assistant Configuration Wizard.

**Note**

You can use the Cisco Unified CallManager Assistant Configuration Wizard only one time to set up the Cisco Unified CallManager Assistant configuration requirements for your system. After running the configuration wizard, you can only view, but not change, your configuration with the wizard.

2. To add new phones and users for managers and assistants, use the Cisco Unified CallManager Assistant manager and Cisco Unified CallManager Assistant assistant phone templates that the Cisco Unified CallManager Assistant Configuration Wizard produced on the BAT server. Use the BAT templates to configure phones for proxy mode only. For information about the templates, see the [“Default Settings for Cisco Unified CallManager Assistant Manager and Assistant Phone Templates”](#) section on page 5-4.
3. For existing manager and assistant phones, you can change the manager and assistant phones to correspond to the Cisco Unified CallManager Assistant phone templates by using either of these methods:
  - You can use the Add Lines feature in BAT to modify existing phones to resemble the Cisco Unified CallManager Assistant phone templates. See the [Adding Lines to Existing Phones and UDPs](#), page 3-81.
  - You can delete the original phones and add new phones by using the Cisco Unified CallManager Assistant phone templates for managers and assistants. Follow the procedures for setting up new phones in the [“Adding Phones”](#) section on page 3-2.
4. After you have configured the phones and lines for managers and assistants, then you associate the manager and assistant lines for Cisco Unified CallManager Assistant control. For information about Cisco Unified CallManager Assistant line configurations, see the [“Manager and Assistant Proxy Line Configurations”](#) section on page 5-5.

## Default Settings for Cisco Unified CallManager Assistant Manager and Assistant Phone Templates

Table 5-1 lists the default settings for the Cisco Unified CallManager Assistant manager phone template.

**Table 5-1** *Default Settings for Manager Phone Templates for Proxy Lines*

Field	Default Value
Softkey Template	Standard Cisco Unified CallManager Assistant Manager
Phone Button Template	Standard Cisco Unified IP Phone model 7960 (2 lines)
Line1	Primary line <ul style="list-style-type: none"> <li>• CSS = Generated_IPMA_CSS_I_E</li> <li>• Partition = Generated_IPMA_Managers</li> </ul>
Line 2	Incoming Intercom line <ul style="list-style-type: none"> <li>• CSS = Generated_IPMA_CSS_I_E</li> <li>• Partition = Generated_IPMA_Everyone</li> <li>• Also configure auto answer with speakerphone or headset option.</li> </ul>
Services	Cisco Unified CallManager Assistant Service

Table 5-2 lists the default settings for the Cisco Unified CallManager Assistant assistant phone template.

**Table 5-2** *Default Settings for Assistant Phone Template for Proxy Lines*

Field	Default Value
Softkey Template	Standard Cisco Unified CallManager Assistant Assistant
Phone Button Template	Standard Cisco Unified IP Phone 7960 Assistant
Expansion Module 1	14-button expansion module

**Table 5-2** Default Settings for Assistant Phone Template for Proxy Lines

Field	Default Value
Line 1 - Line 6 (On IP Phone 7960)	Proxy line 1 - 5 with each proxy line defaulted to <ul style="list-style-type: none"> <li>• CSS = IPMA_CSS_M_E</li> </ul>
Line 2 - Line 5 (On Expansion Module)	<ul style="list-style-type: none"> <li>• Partition = Generated_IPMA_Everyone</li> </ul>
Line 7 (On Expansion Module)	Intercom line <ul style="list-style-type: none"> <li>• CSS = Generated_IPMA_CSS_I_E</li> <li>• Partition = Generated_IPMA_Everyone</li> <li>• Also configure auto answer with speakerphone or headset option.</li> </ul>

## Manager and Assistant Proxy Line Configurations

BAT assigns Cisco Unified CallManager Assistant line configurations by mapping the manager's primary lines on the phone to proxy lines on the assistant phone. When you used the Cisco Unified CallManager Assistant manager and assistant default templates that the Cisco Unified CallManager Assistant wizard created, you can associate from one to five manager lines on one assistant phone. For phones configured with the Cisco Unified CallManager Assistant templates, this example shows the line configurations when you associate two manager phones to an assistant phone.

### Manager 1 Phone:

- Line 1— Primary line
- Line 2— Intercom line

### Manager 2 Phone:

- Line 1— Primary line
- Line 2— Intercom line

### Assistant Phone:

- Line 1—Primary line

- Line 2—Proxy line for Manager 1
- Line 3—Proxy line for Manager 2
- Lines 4 through 6 are unassigned
- Line 7—Intercom line

Lines 4 through 6 are available for other manager associations.

When you associate multiple managers to an assistant phone, BAT creates proxy lines based on the order in the CSV data file. BAT creates the first manager-assistant line by assigning all the manager's primary lines as proxy lines to the unassigned lines on the assistant phone. BAT continues creating individual manager-assistant proxy lines based on the order of the CSV record until all lines on the assistant phone are assigned or all managers in the CSV record are associated.

When you associate multiple assistants to a manager primary line, BAT assigns assistants to the manager based on the order in the CSV data file. BAT assigns the manager's primary lines based on the first assistant's number of available lines. For example, a manager's phone has two primary lines. The first assistant, who is listed in the CSV data file, has only one available line. Consequently, BAT associates only one primary line for the manager and one proxy line on all the assistant phones that are listed in the CSV record.

## Cisco Unified CallManager Assistant Manager Phone Configuration

Table 5-3 lists all possible line configurations for a manager phone that BAT can set up when using manager-assistant associations.

**Table 5-3** *Manager Phone Line Configuration*

Number of Available Lines	Configuration
One line	Line 1—Primary line (Cisco Unified CallManager Assistant controlled) Intercom line (none)
Two lines (Default Cisco Unified CallManager Assistant manager phone template)	Line 1—Primary line (Cisco Unified CallManager Assistant controlled) Line 2—Intercom line (optional)
More than two lines	Last line gets configured as the intercom line. The number of available lines on the assistant phone determines the number of manager lines that get associated with proxy lines.

## Cisco Unified CallManager Assistant Assistant Phone Configuration

Table 5-4 lists the default line configuration for the assistant phones that BAT sets up during manager-assistant associations.

**Table 5-4** *Assistant Phone Line Configurations*

Number of Available Lines	Configuration
One line	Line 1—Proxy line Intercom line (none)
Two lines	Line 1—Primary line Line 2—Proxy line Intercom line (none)

**Table 5-4 Assistant Phone Line Configurations (continued)**

<b>Number of Available Lines</b>	<b>Configuration</b>
Three lines	Line 1—Primary line Line 2—Proxy line Line 3—Intercom line
More than three lines	Line 1—Primary line Line 2—Proxy line Last line gets configured as the intercom line All other lines get configured as proxy lines
Seven lines (Default Cisco Unified CallManager Assistant assistant phone template)	Line 1—Primary line Line 2 through line 6 can get configured as proxy lines to support up to five managers. Line 7—Intercom line

### Proxy Line Example for Cisco Unified CallManager Assistant Manager and Assistant Phones

You associate two managers, each with three existing lines, to an assistant phone with six unassigned lines. BAT sets the following line configurations on the manager and assistant phones.

#### Manager 1 Phone:

- Line 1—Manager primary line (DN is 2355)
- Line 2—Manager primary line (DN is 2366)
- Line 3—Manager intercom line

#### Manager 2 Phone:

- Line 1—Manager primary line (DN is 2656)
- Line 2—Manager primary line (DN is 2666)
- Line 3—Manager intercom line

#### Assistant Phone:

- Line 1—Assistant primary line (DN is 3333)

- Line 2—Proxy line 1 for Manager 1 (DN is 3455)
- Line 3—Proxy line 1 for Manager 2 (DN is 3656)
- Line 4—Proxy line 2 for Manager 1 (DN is 3366)
- Line 5—Proxy line 2 for Manager 2 (DN is 3666)
- Line 6—Available
- Line 7—Assistant intercom line

When you associate a manager phone that has preexisting primary lines, you must ensure that the number of unassigned lines on the assistant phone is equal to or greater than the number of primary lines on the manager phone. For instance, BAT does not allow you to create an association between a manager that has a phone with four configured primary lines and an assistant with only three available lines.

#### Additional Information

See the [“Related Topics” section on page 5-28](#).

## Setting Up New Phones for Cisco Unified CallManager Assistant Managers and Assistants with Proxy Lines

To set up new phones for Cisco Unified CallManager Assistant managers and assistants that use proxy lines, use the following procedure.

#### Before You Begin

1. Run the Cisco Unified CallManager Assistant Configuration Wizard to create the Cisco Unified CallManager Assistant templates, partition, and calling search space.
2. If you want to associate more than five managers to an assistant, you must access the Cisco Unified CallManager Assistant Assistant Template and make a copy with a new name. Add more lines to the template to accommodate the additional managers.

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- Step 1** Choose **Configure > Phones**. The Phones Options window displays.
- Step 2** Choose **Insert Phones with Users** and click **Next**. The Steps to Insert Phones window displays.
- Step 3** In the Steps to Insert Phones window, Choose **Add, view, or modify phone templates** and click **Next**.

The Phone Template Configuration window displays and lists the Cisco Unified CallManager Assistant Manager and the Cisco Unified CallManager Assistant Assistant phone templates in the Phone Templates List.




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**Note** The BAT Cisco Unified CallManager Assistant templates are write protected. If you want to make changes to these templates, you must make a copy of the template and then edit the template with your changes.

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See the [“Default Settings for Manager Phone Templates for Proxy Lines”](#) section on page 5-4 for descriptions of the manager phone template fields.

See the [“Default Settings for Assistant Phone Template for Proxy Lines”](#) section on page 5-4 for descriptions of the assistant phone template fields.

- Step 4** Create the CSV data file for manager phones and another file for assistant phones by using these options:
- Use the BAT spreadsheet and choose the **Phones** tab.
  - Use a text editor and refer to the manager or assistant template fields as a guide.
- Step 5** Use the procedure in the [“Adding Phones”](#) section on page 3-2 for detailed steps to insert new phones.
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## Setting Up Cisco Unified CallManager Assistant Proxy Lines on Existing Phones

To set up lines on existing phones for managers and assistants, use the following procedure.

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- Step 1** Choose **Configure > Phones**. The Phones Options window displays.
- Step 2** Choose **Add Lines** and click **Next**. The Add Lines (Step 1 of 2) window displays.
- Step 3** If you need to copy and modify the Cisco Unified CallManager Assistant templates for BAT, see these topics for reference:
- [Default Settings for Manager Phone Templates for Proxy Lines, page 5-4](#)
  - [Default Settings for Assistant Phone Template for Proxy Lines, page 5-4](#)



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**Note** If you changed any of the configuration information (for example, partition names) when you ran the Cisco Unified CallManager Assistant Configuration Wizard, you must use the same configuration information for the fields when you edit the template.

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- Step 4** Create the CSV data file for manager phones and another file for assistant phones by using one of these options:
- Use the BAT spreadsheet and choose the **Add Lines** tab.
  - Use a text editor and use the manager or assistant template fields as a guide.
- Step 5** To set up manager and assistant lines on existing phones, use the procedure in [“Adding Lines to Existing Phones and UDPs” section on page 3-81](#).
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#### **Additional Information**

See the [“Related Topics” section on page 5-28](#).

## **Configuring Phones in Shared Line Mode for Cisco Unified CallManager Assistant**

To configure manager and assistant phones with shared line support, you must perform the following tasks:

1. You must set up the Cisco Unified CallManager Assistant service parameters for shared line support in Cisco CallManager. Refer to the *Cisco Unified CallManager Features and Services Guide* for information.
2. You need a phone button template with five or more lines for the IP Phone model 7960.
3. Configure the phones for managers and assistants by using the following guidelines:

### **Manager Phones in Shared Line Mode**

Use the procedures for setting up new phones by using BAT in the [“Adding Phones” section on page 3-2](#).

Create a BAT template to add new or update existing manager phones with the following phone settings:

- Assign the Softkey template: Standard Cisco Unified CallManager Assistant Shared Mode Manager.
- Add primary lines to share with assistants, if needed.
- Set up the voice-messaging profile on the primary line.
- Add an incoming intercom line (optional).
- Add speed-dial buttons for outgoing intercom targets (optional).
- Set the user locale.

## Assistant Phones in Shared Line Mode

Use the procedures for setting up new phones by using BAT in the [“Adding Phones” section on page 3-2](#).

Create a BAT template to add new or update existing assistant phones with the following phone settings:

- Assign the Softkey template: Standard Cisco Unified CallManager Assistant Assistant
- If you are using a Cisco 14-button expansion module (7914) for additional lines, specify the expansion module type in the BAT template.




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**Note** All Cisco Unified IP Phone model phone button templates include expansion module lines.

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- Add a personal primary line.
  - Add shared lines for each associated manager. Use the same directory number and partition as the primary line on the manager phone.
  - Add an incoming intercom line (optional)
  - Add speed dials to the managers intercom lines (optional)
  - Set the user locale
1. To add lines to existing managers or assistants phones, see the [“Adding Lines to Existing Phones and UDPs” section on page 3-81](#). Use the line settings as specified in these sections:

- [Manager Phones in Shared Line Mode, page 5-11](#)
  - [Assistant Phones in Shared Line Mode, page 5-12](#)
2. After you have configured the phones and lines for managers and assistants, then you associate the manager and assistant lines for Cisco Unified CallManager Assistant control. Follow the procedures in the “[Creating the CSV Data File for Manager-Assistant Associations](#)” section on page 5-14.

## Manager and Assistant Shared Line Configurations

BAT associates Cisco Unified CallManager Assistant line configurations to shared lines that are assigned to the manager and the assistant phones. You set the shared line mode in the manager’s configuration when associating managers with assistants.

In shared line mode, the manager’s line corresponds to a shared line on the assistant phone. For example, in order to associate two managers with an assistant, you add two lines to the assistant’s phone that have the same directory numbers and partitions as the primary lines on the managers phones.

### Manager 1 Phone:

- Line 1— Primary line (DN is 2355)
- Line 2— Intercom line (optional)

### Manager 2 Phone:

- Line 1— Primary line (DN is 2875)
- Line 2— Intercom line (optional)

### Assistant’s Phone:

- Line 1—Assistant’s primary line (DN is 3356)
- Line 2—Shared line with Manager 1 (DN is 2355)
- Line 3—Shared line with Manager 2 (DN is 2875)
- Lines 4 through 6 are available
- Line 7—Intercom line (optional)

You can add lines 4 through 6 as shared lines for other managers.

When you add multiple manager lines to an assistant phone, all lines on the assistant's phone must use shared line mode. You cannot mix proxy and shared lines on the assistant phone. Likewise, when a manager has multiple assistants, all associations must use shared line mode.

When you associate multiple assistants to a manager who has shared line mode, BAT assigns Cisco Unified CallManager Assistant associations only to those assistants that are also using shared line mode.

#### **Additional Information**

See the [“Related Topics” section on page 5-28](#).

## **Creating the CSV Data File for Manager-Assistant Associations**

When you use BAT to insert manager-assistant associations to the Cisco Unified CallManager database, you can add new associations or update existing associations.

You have two options for creating a CSV data file for manager-assistant associations:

- [Using the BAT Spreadsheet to Add or Update Manager-Assistant Associations, page 5-15](#)
- Using a text editor to create a text file in CSV format by using the [Managers and Assistants File Formats, page A-21](#).

When you create an association for a new manager, you need to enter a device name. When you update a manager with an existing Cisco Unified CallManager Assistant record, consider these fields optional. See the [“Manager and Assistant Proxy Line Configurations” section on page 5-5](#) for information about how BAT assigns line configurations on manager and assistant phones. BAT does not allow you to assign the intercom line of a manager to a proxy line for an assistant.

## Using the BAT Spreadsheet to Add or Update Manager-Assistants Associations

The BAT spreadsheet includes data file templates with macros to make it easy to add, update, or delete manager-assistant associations. For information about installing and using the BAT spreadsheet, see the [“Using the BAT Spreadsheet for Gathering Data”](#) section on page 1-11.

To use the BAT spreadsheet for adding new Cisco Unified CallManager Assistant associations, use the following procedure. You can use two ways to set up the manager-assistant configurations:

- To create manager-assistant associations with the default line configuration, see the [“Creating Default Manager-Assistant CSV Data Files”](#) section on page 5-15.

For the default line configurations for the manager and assistant phones, see [Table 5-3](#) and [Table 5-4](#).

- If you want to assign proxy lines that do not follow the default line configuration, see the [“Creating Custom Manager-Assistant CSV Data Files”](#) section on page 5-17.

### Creating Default Manager-Assistant CSV Data Files

To create the CSV data file for inserting or updating manager-assistant association for both proxy and shared mode by using the default configuration, use the following procedure.

#### Procedure

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- Step 1** Locate and double-click the **BAT.xls** file to open the BAT spreadsheet.
  - Step 2** When prompted, click **Enable Macros** to use the spreadsheet capabilities.
  - Step 3** Click the **Default Managers-Assistants** tab at the bottom of the spreadsheet to display the manager-assistant association options.
  - Step 4** Scroll to the right side of the template until you see the radio buttons and choose the type of associations for this transaction:
    - **One manager, multiple assistants**

- **One assistant, multiple managers**

**Step 5** Complete all mandatory fields and any relevant, optional fields.

If you choose the **One manager, multiple assistants** radio button, enter the following information in each row:

- **Manager ID**—Enter the user ID, up to 30 characters, of the manager.
- **Assistant ID#**—Enter the user IDs, up to 30 characters, for the assistants to whom the manager will be associated.

The # symbol represents the number of assistants assigned to a manager.




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**Note** To add more assistants, click **Add more Assistants**.

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If you choose the **One assistant, multiple managers** radio button, enter the following information in each row:

- **Assistant ID**—Enter the user ID, up to 30 characters, of the assistant.
- **Manager ID#**—Enter the user IDs, up to 30 characters, for the managers to whom the assistant will be associated.

The # symbol represents the number of managers assigned to an assistant.




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**Note** To add more managers, click **Add more Managers**.

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**Step 6** Choose the operation that you want to perform:

- To create new manager-assistant associations, click **Insert**.
- To delete a manager or an assistant from a manager-assistant association, click **Delete**.

**Step 7** To transfer the data from the BAT spreadsheet into a CSV data file, click **Export to BAT Format**.

The system saves the file to C:\XLSDataFiles or to your choice of another existing folder. The filename is

<type of operation>ManagerAssistants#timestamp.txt

where <type of operation> specifies the type of operation that was chosen in Step 6, and “timestamp” represents the precise date and time that the file was created.

You must copy the CSV data file to the Cisco Unified CallManager publisher database server, so BAT can access the CSV data file. Using a floppy disk or a mapped network drive, copy the CSV data file from C:\XLSDataFiles\ (or the folder that you chose to store the file) to one of the following folders on the publisher database server:

- Insert or Updates—C:\BATFiles\ManagersAssistants\Insert\
- Delete—C:\BATFiles\ManagersAssistants\Delete\

For information on how to read the exported CSV file, in the BAT Insert Managers/Assistants window, click the link to **View Sample File**.

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#### Additional Information

See the [“Related Topics”](#) section on page 5-28.

## Creating Custom Manager-Assistant CSV Data Files

When you have existing phones that you want to set up with manager-assistant associations, you can use the Custom Managers-Assistants tab in the BAT spreadsheet. To create the CSV data file for inserting or updating manager-assistant associations for proxy lines on the assistant phones, use the following procedures.

#### Procedure

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- Step 1** Locate and double-click the **BAT.xls** file to open the BAT spreadsheet.
- Step 2** When prompted, click **Enable Macros** to use the spreadsheet capabilities.
- Step 3** To display the manager-assistant association options, click the **Custom Managers-Assistants** tab at the bottom of the spreadsheet.
- Step 4** Scroll to the right side of the template until you see **Number of Proxy Lines** box. In that box, enter the number of proxy lines that you are assigning to an assistant. The spreadsheet adds Proxy Line DN and Manager Line DN Columns based on the number that you enter.

Complete all mandatory fields and any relevant, optional fields.

- **Manager ID**—Enter the user ID of the manager.

- **Device Name**—Enter the device name assigned to the manager’s phone.
- **Intercom DN**—Enter the directory number for the manager’s intercom line. (Optional)
- **Assistant ID**—Enter the user IDs for the assistants to whom the manager will be associated.
- **Device Name**—Enter the device name assigned to the assistant’s phone.
- **Intercom DN**—Enter the directory number for the assistant’s intercom line. (Optional)
- **Proxy Line DN#**—Enter the directory number for the assistant’s proxy line.
- **Manager Line DN#**—Enter the directory number for the manager’s primary line.

The # symbol represents the number of proxy lines associated to a manager.

**Step 5** To transfer the data from the BAT spreadsheet into a CSV data file, click **Export to BAT Format** button.

The system saves the file to C:\XLSDataFiles or to your choice of another existing folder. The filename is

Custom Managers-Assistants#timestamp.txt.

You must copy the CSV data file to the Cisco Unified CallManager publisher database server, so BAT can access the CSV data file. Using a floppy disk or a mapped network drive, copy the CSV data file from C:\XLSDataFiles\ (or the folder that you chose to store the file) to the server that is running the publisher database in the folder, C:\BATFiles\ManagersAssistants\Insert\.

For information on how to read the exported CSV file, in the BAT Insert Managers/Assistants window, click the link to **View Sample File**.

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### Additional Information

See the [“Related Topics”](#) section on page 5-28.

# Inserting Manager-Assistant Associations to Cisco Unified CallManager

To insert new manager-assistant associations or update existing associations, you need a CSV data file. See the [“Creating the CSV Data File for Manager-Assistant Associations” section on page 5-14](#) for information.

When BAT updates manager assistant associations, it does not change existing Cisco Unified CallManager Assistant line configurations for the intercom directory number or associated devices.



## Caution

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The Manager-Assistant association fails when the assistant phone does not have enough lines to support the minimum Cisco Unified CallManager Assistant configuration.

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To add or update new manager-assistant associations to Cisco Unified CallManager database, use the following procedure.

## Procedure

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- Step 1** Choose **Configure > Managers/Assistants**. The Manager/Assistant Options window displays.
  - Step 2** Choose **Insert Managers/Assistants** and click **Next**. The Insert/Managers/Assistants window displays.
  - Step 3** In the **File Name** field, choose the CSV data file that you created for this bulk transaction.
  - Step 4** If the managers use extension mobility to log in, check the **Configure managers as mobile managers** check box.
  - Step 5** When all the phones have shared lines, check the **Uses shared lines** check box.
  - Step 6** In Insert Options, choose the type of CSV data file that you created:
    - **Default**—If you created a standard CSV data file, choose the type of associations for this transaction based on the data in the CSV file.
      - **Associate one or more assistants to a manager**
      - **Associate one or more managers to an assistant**

- **Custom**—If you created a custom CSV data file for proxy mode.

**Step 7** Click **Insert**. A message displays that tells you how long it takes to insert the records to the Cisco Unified CallManager database. You can cancel the transaction if it might cause performance degradation.

**Step 8** To insert the manager-assistant associations, click **OK** or to cancel the transaction, click **Cancel**.

If you clicked OK, a Transaction Status window displays. To see the transaction in progress, you can click the **Show Latest Status** button.

**Step 9** When the transaction completes, you can click **View Latest Log File** to see a log file that indicates the number of records that were added and the number of records that failed, including an error code. For more information on log files, see the “[BAT Log Files](#)” section on page 13-1.




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**Note** When BAT performs an update to an assistant or manager configuration and the changes are only partially completed—because there were not enough available lines—the whole transaction record fails.

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**Step 10** For changes to take effect, you must restart Cisco IP Manager Assistant service. Use the following URL to log in to the Tomcat Manager web page using administrator privileges: `http://<IPMA server IP address>/manager/list`.

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#### Additional Information

See the “[Related Topics](#)” section on page 5-28.

## Deleting Manager-Assistant Associations from Cisco Unified CallManager

You can use BAT to delete a specific manager-assistant association from the Cisco Unified CallManager database. For example, the assistant with the user ID, *jmorgan*, is assigned to two managers with user IDs, *rcraig* and *dbaker*. If you want to change the manager-assistant association so the assistant, *jmorgan* is only assigned to *rcraig*, you can delete the *jmorgan-dbaker* association by creating a CSV data file with the following entry:

### Example

jmorgan,dbaker

If you want to delete a manager or an assistant from all manager-assistant associations, see the following sections:

- [Deleting Managers from Cisco Unified CallManager, page 5-22](#)
- [Deleting Assistants from Cisco Unified CallManager, page 5-25](#)

To delete specific manager-assistant associations from Cisco Unified CallManager, use this procedure.

### Before You Begin

You must have a CSV data file that contains the user IDs for the specific managers and assistants associations that you want to delete. See the [“Creating the CSV Data File for Manager-Assistant Associations”](#) section on page 5-14.

### Procedure

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- Step 1** Choose **Configure > Managers/Assistants**. The Manager/Assistant Options window displays.
- Step 2** Choose **Delete Managers/Assistants** and click **Next**. The Delete Managers/Assistants window displays.
- Step 3** In the **File Name** field, choose the CSV file that you created for this type of bulk transaction.
- Step 4** Choose the type of deletion:
  - **Delete associated assistants for one manager**
  - **Delete associated managers for one assistant**
- Step 5** Click **Delete**. A message displays that tells how long it will take to delete the records from the Cisco Unified CallManager database. You can cancel the transaction if it might cause performance degradation.

When the transaction completes, you can click **View Latest Log File** to see a log file that indicates the number of records that are deleted and the number of records that failed, including an error code. For more information on log files, see the [“BAT Log Files”](#) section on page 13-1.

- Step 6** For changes to take effect, you must restart Cisco IP Manager Assistant service. Use the following URL to log in to the Tomcat Manager web page using administrator privileges: `http://<IPMA server IP address>/manager/list`.
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#### Additional Information

See the “[Related Topics](#)” section on page 5-28.

## Deleting Managers from Cisco Unified CallManager

When you delete Cisco Unified CallManager Assistant managers, Cisco Unified CallManager maintains information on the manager as a user in the directory. For example, if a manager with the user ID, *rmartinez*, has two assistants with user IDs, *dbell* and *jkent*, you can disassociate *rmartinez* from both assistants by deleting *rmartinez* as a manager in the Cisco Unified CallManager database. The directory still shows *rmartinez* as a user.

You can delete managers with all their manager-assistant associations from the Cisco Unified CallManager database and LDAP Directory. To access the Delete Managers option, choose **Configure > Managers/Assistants > Delete Managers**.

You have two ways for locating existing records to delete:

- [Using Query to Delete Manager Associations, page 5-22](#)
- [Using a Custom File to Delete Manager Associations, page 5-24](#).

## Using Query to Delete Manager Associations

To delete managers from their associations with assistants from Cisco Unified CallManager directory, use this procedure.

#### Procedure

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- Step 1** In the Delete Managers window, choose **Use Query** and click **Next**. The Delete Managers (Cisco Unified CallManager Assistant) window displays.
- Step 2** To locate the Managers that you want to delete, define the filter.



---

**Caution** If you do not define a filter, BAT deletes all managers.

---

**Step 3** In the first drop-down list box, choose a field to query such as User ID, Department, First Name, or Last Name.

**Step 4** In the second drop-down list box, choose **contains** or **is exactly**.

**Step 5** In the third box, which is the search field/list box, either choose or enter the value that you want to locate, such as a specific manager.



---

**Note** To choose managers from more than one department, enter multiple departments in this field. For example, to choose managers from departments 12 and 24, enter **12, 24** in the third box instead of performing two operations.

---

**Step 6** To add the defined filter to the query, click **Add To Query** button  
If you make a mistake, click the **Clear Query** button to remove the query; then, return to [Step 3](#) and start over.

**Step 7** To display the records that are going to be affected, click **View Query Result**.

**Step 8** To delete the chosen managers, click **Delete**.  
A message displays that tells how long it takes to delete the records in the Cisco Unified CallManager directory. You can cancel the transaction or click **OK** to continue.

**Step 9** When the transaction completes, you can click **View Latest Log File** to see a log file that indicates the number of records that are deleted and the number of records that failed, including an error code. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).

**Step 10** For changes to take effect, you must restart Cisco IP Manager Assistant service. Use the following URL to log in to the Tomcat Manager web page using administrator privileges: `http://<IPMA server IP address>/manager/list`.

---

### Additional Information

See the [“Related Topics” section on page 5-28](#).

## Using a Custom File to Delete Manager Associations

You can create a custom file by using a text editor to locate manager associations that you want to delete.

### Before You Begin

1. Create a text file that lists user IDs for managers that you want to delete
2. Put each user ID on a separate line.
3. Save the custom file with a <filename.txt> to this folder:  
C:\BATfiles\ManagersAssistants\Query\Delete\

To delete managers associations by using a custom file, use the following procedure.

### Procedure

- 
- Step 1** In the Delete Managers window, choose **Use Custom File** and click **Next**. The Delete Managers (Cisco Unified CallManager Assistant) window displays.
- Step 2** In Select managers where field, keep the identifier, **User ID**.
- Step 3** In the second field, in Custom File drop-down list box, choose the name of the custom file that you created for this transaction.
- Step 4** To add the defined filter to the query, click **Add To Query**.  
If you make a mistake, click **Clear Query** to remove the query; then, return to [Step 3](#) and start over.




---

**Caution** If no information is entered into the query text box, the system deletes all manager records.

---

**Step 5** To display the records that are going to be affected, click **View Query Result**.

**Step 6** Click **Delete** to delete the records.

A message displays that tells you how long it takes to delete the records to the Cisco Unified CallManager database. You can cancel the transaction if it might cause performance degradation.

**Step 7** To delete the manager-assistant associations, click **OK**, or to cancel the transaction, click **Cancel**.

If you clicked OK, a Transaction Status window displays. To see the transaction in progress, you can click **Show Latest Status**.

- Step 8** For changes to take effect, you must restart Cisco IP Manager Assistant service. Use the following URL to log in to the Tomcat Manager web page using administrator privileges: `http://<IPMA server IP address>/manager/list`.
- 

#### Additional Information

See the “[Related Topics](#)” section on page 5-28.

## Deleting Assistants from Cisco Unified CallManager

When you delete Cisco Unified CallManager Assistant assistants, Cisco Unified CallManager maintains information on the assistant as a user in the directory. For example, Assistant *thudson* is assigned to two managers, *hart* and *dstewart*. You can disassociate *thudson* from both managers by deleting *thudson* as an assistant in the Cisco Unified CallManager database. The directory still shows *thudson* as a user.

You can delete assistants with all their manager-assistant associations from the Cisco Unified CallManager database and LDAP Directory. To access the Delete Assistants option, choose **Configure > Managers/Assistants > Delete Assistants**.

You have two ways for locating existing records to delete:

- [Using Query to Delete Assistants Associations, page 5-25](#)
- [Using a Custom File to Delete Assistant Associations, page 5-27](#).

## Using Query to Delete Assistants Associations

To delete assistants from their associations with managers, use this procedure .

#### Procedure

- Step 1** In the Delete Assistants window, choose **Use Query** and click **Next**. The Delete Assistants (Cisco Unified CallManager Assistant) window displays.

**Step 2** To locate the Assistants that you want to delete, define the filter.

**Caution**


---

If you do not define a filter, BAT deletes all assistants.

---

**Step 3** In the first drop-down list box, choose a field to query such as User ID, Department, First Name, or Last Name.

**Step 4** In the second drop-down list box, choose **contains** or **is exactly**.

**Step 5** In the third box, which is the search field/list box, either choose or enter the value that you want to locate, such as a specific assistant.

**Note**


---

To choose assistants from more than one department, enter multiple departments in this field. For example, to choose assistants from departments 12 and 34, enter **12, 34** in the third box instead of performing two operations.

---

**Step 6** To add the defined filter to the query, click **Add To Query**.

If you make a mistake, click **Clear Query** to remove the query; then, return to [Step 3](#) and start over.

**Step 7** To display the records that are going to be affected, click **View Query Result**.

Specify the setting that you want to update for all the records that you defined in your query.

**Step 8** To delete the chosen assistants, click **Delete**.

A message displays that tells how long it will take to delete the records in the Cisco Unified CallManager database. You can cancel the transaction or click **OK** to continue.

**Step 9** When the transaction completes, you can click **View Latest Log File** to see a log file that indicates the number of records that are added and the number of records that failed, including an error code. For more information on log files, see the [“BAT Log Files” section on page 13-1](#).

**Step 10** For changes to take effect, you must restart Cisco IP Manager Assistant service. Use the following URL to log in to the Tomcat Manager web page using administrator privileges: `http://<IPMA server IP address>/manager/list`.

---

### Additional Information

See the “[Related Topics](#)” section on page 5-28.

## Using a Custom File to Delete Assistant Associations

You can create a custom file by using a text editor to locate assistant associations that you want to delete.

### Before You Begin

1. Create a text file that lists user ID for assistants that you want to delete, putting each on a separate line.
2. Save the custom file with a <filename.txt> to this folder:  
C:\BATfiles\ManagersAssistants\Query\Delete\

To delete assistants associations by using a custom file, use the following procedure.

### Procedure

- 
- Step 1** From the Delete Assistants window, choose **Use Custom File** and click **Next**. The Delete Assistants (Cisco Unified CallManager Assistant) window displays.
  - Step 2** In Select Assistants where drop-down list box, choose the field that you used in the custom file, user ID.
  - Step 3** In the in Custom File drop-down list box, choose the name of the custom file that you created for this transaction.
  - Step 4** To add the defined filter to the query, click **Add To Query**.  
If you make a mistake, click **Clear Query** to remove the query; then, return to [Step 3](#) and start over.



### Caution

If no information is entered into the query text box, the system deletes all manager records.

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- Step 5** To display the records that are going to be affected, click **View Query Result**.
- Step 6** To delete the records, click **Delete**.
- A message displays that tells you how long it takes to delete the records from the Cisco Unified CallManager directory. You can cancel the transaction or click **OK** to continue.
- Step 7** To display the log file that BAT generated, you can click the **View Latest Log File** link. The log file displays the number of records that were deleted and the number of records that failed, including an error code. For more information on log files, see the “[BAT Log Files](#)” section on page 13-1.
- Step 8** For changes to take effect, you must restart Cisco IP Manager Assistant service . Use the following URL to log in to the Tomcat Manager web page using administrator privileges: `http://<IPMA server IP address>/manager/list`.
- 

#### Additional Information

See the “[Related Topics](#)” section on page 5-28.

## Related Topics

- [Inserting Manager-Assistant Associations to Cisco Unified CallManager, page 5-19](#)
- [Deleting Manager-Assistant Associations from Cisco Unified CallManager, page 5-20](#)
- [Deleting Managers from Cisco Unified CallManager, page 5-22](#)
- [Deleting Assistants from Cisco Unified CallManager, page 5-25](#)
- [Generating Reports for Cisco Unified CallManager Assistant Managers and Assistants, page 11-13](#)

For more information related to Cisco Unified CallManager Assistant, refer to this documentation.

- *Cisco Unified CallManager Features and Services Guide*
- *Cisco Unified CallManager Assistant User Guide*