



## CHAPTER 28

# Working with Cisco Unified Communications Manager Assistant

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You can use Cisco Unified Communications Manager Bulk Administration (BAT) to manage the Cisco Unified Communications Manager Assistant feature in Cisco Unified Communications Manager. 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 Communications Manager Assistant, page 28-2](#)
- [Configuring Phones in Shared Line Mode for Cisco Unified Communications Manager Assistant, page 28-7](#)

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 28-9](#).

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

- [Inserting Manager-Assistant Associations to Cisco Unified Communications Manager, page 29-1](#)
- [Deleting Manager-Assistant Associations from Cisco Unified Communications Manager, page 30-1](#)
- [Deleting Managers from Cisco Unified Communications Manager, page 31-1](#)
- [Deleting Assistants from Cisco Unified Communications Manager, page 32-1](#)

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

- *Cisco Unified Communications Manager Features and Services Guide*
- *Cisco Unified Communications Manager Assistant User Guide*

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

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

- Proxy mode—The manager's primary line associates 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 Communications Manager Assistant”](#) section on page 28-2.

- 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 Communications Manager Assistant”](#) section on page 28-7.

**Note**


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You can associate users to devices/phones only if they support Unified CM Assistant.

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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 Communications Manager Assistant

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

1. Cisco recommends that you use the Cisco Unified CM Assistant Configuration Wizard to set up and configure Unified CM Assistant requirements for your system. The wizard automatically creates the phone templates for Unified CM Assistant manager and assistant, route points, partitions, translation patterns, and calling search space for the Cisco Unified CM Assistant service. To run the Cisco Unified CM Assistant Configuration Wizard ensure BAT and the wizard are on the same server. Refer to the *Cisco Unified Communications Manager Features and Services Guide for information about running the Cisco Unified CM Assistant Configuration Wizard*.

**Note**


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

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2. To add new phones and users for managers and assistants, use the Unified CM Assistant manager and Unified CM Assistant assistant phone templates that the Cisco Unified CM 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 Communications Manager Assistant Manager and Assistant Phone Templates”](#) section on page 28-3.
3. For existing manager and assistant phones, you can change the manager and assistant phones to correspond to the Unified CM 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 Unified CM Assistant phone templates. See the [“Adding Lines to Existing Phones and UDPs”](#) section on page 10-8.
  - You can delete the original phones and add new phones by using the Unified CM Assistant phone templates for managers and assistants. *Follow the procedures for setting up new phones in the “Adding Phones” section on page 3-1.*
4. After you configure the phones and lines for managers and assistants, you associate the manager and assistant lines for Unified CM Assistant control. For information about Unified CM Assistant line configurations, see the [“Manager and Assistant Proxy Line Configurations”](#) section on page 28-3.

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

Table 28-1 lists the default settings for the Unified CM Assistant manager phone template.

**Table 28-1** *Default Settings for Manager Phone Templates for Proxy Lines*

Field	Default Value
Softkey Template	Softkey Template Standard Manager
Phone Button Template	Standard Cisco Unified IP Phone model 7960 (2 lines)
Line 1	Primary line <ul style="list-style-type: none"> <li>• CSS = Generated_CSS_I_E</li> <li>• Partition = Generated_Managers</li> </ul>
Line 2	Incoming Intercom line <ul style="list-style-type: none"> <li>• CSS = Generated_CSS_I_E</li> <li>• Partition = Generated_Everyone</li> <li>• Also configure auto answer with headset option.</li> </ul>
Services	Assistant Primary Service

Table 28-2 lists the default settings for the Unified CM Assistant assistant phone template.

**Table 28-2** *Default Settings for Assistant Phone Template for Proxy Lines*

Field	Default Value
Softkey Template	Softkey Assistant
Phone Button Template	Standard Cisco Unified IP Phone 7960 Assistant
Expansion Module 1	14-button expansion module
One line on base phone and five lines on expansion module	For Proxy lines, one line on base phone and five lines on expansion module have the following default configuration: <ul style="list-style-type: none"> <li>• CSS = Generated_CSS_M_E</li> <li>• Partition = Generated_Everyone</li> </ul>
Line 7 (On Expansion Module)	Intercom line <ul style="list-style-type: none"> <li>• CSS = Generated_CSS_I_E</li> <li>• Partition = Generated_Everyone</li> <li>• Also configure auto answer with headset option.</li> </ul>

## Manager and Assistant Proxy Line Configurations

BAT assigns Unified CM Assistant line configurations by mapping the manager's primary lines on the phone to proxy lines on the assistant phone. When you use the Unified CM Assistant manager and assistant default templates that the Unified CM Assistant wizard created, you can associate from one to five manager lines on one assistant phone. For phones configured with the Unified CM 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 remain 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 Communications Manager Assistant Manager Phone Configuration**

Table 28-3 lists all possible line configurations for a manager phone that BAT can set up when using manager-assistant associations.

**Table 28-3**      *Manager Phone Line Configuration*

<b>Number of Available Lines</b>	<b>Configuration</b>
One line	Line 1—Primary line (Unified CM Assistant controlled) Intercom line (none)
Two lines (Default Unified CM Assistant manager phone template)	Line 1—Primary line (Unified CM 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.

## Unified CM Assistant Phone Configuration

Table 28-4 lists the default line configuration for the assistant phones that BAT sets up during manager-assistant associations.

**Table 28-4 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)
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 Unified CM 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 Communications Manager 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 equals or is 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.

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

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

### Before You Begin

1. Run the Unified CM Assistant Configuration Wizard to create the Unified CM Assistant templates, partition, and calling search space.
2. If you want to associate more than five managers to an assistant, you must access the Unified CM 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 **BAT Administrator > Phones > Phones Template**. The Phone Template Configuration window displays.



**Note** Because BAT Unified CM Assistant templates are write protected, 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 28-3 for descriptions of the manager phone template fields.

See the [“Default Settings for Assistant Phone Template for Proxy Lines”](#) section on page 28-3 for descriptions of the assistant phone template fields.

**Step 2** 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 3** Use the procedure in the [“Adding Phones”](#) section on page 3-1 for detailed steps to insert new phones.

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## Setting Up Cisco Unified Communications Manager 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 **BAT Administration > Phones > Add Lines**. The Phone Add Lines window displays.
- Step 2** If you need to copy and modify the Unified CM Assistant templates for BAT, see these topics for reference:
- [Table 28-1Default Settings for Manager Phone Templates for Proxy Lines, page 28-3](#)
  - [Table 28-2Default Settings for Assistant Phone Template for Proxy Lines, page 28-3](#)
-  **Note** If you changed any configuration information (for example, partition names) when you ran the Cisco Unified CM Assistant Configuration Wizard, you must use the same configuration information for the fields when you edit the template.
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- Step 3** 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 4** *To set up manager and assistant lines on existing phones, use the procedure in [Adding Lines to Existing Phones and UDPs, page 10-8](#).*
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#### Additional Topics

See the [“Related Topics” section on page 28-12](#).

## Configuring Phones in Shared Line Mode for Cisco Unified Communications Manager Assistant

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

1. You must set up the Unified CM Assistant service parameters for shared line support in Cisco Unified Communications Manager. Refer to the *Cisco Unified Communications Manager Features and Services Guide* for information.
2. You need a phone button template with five or more lines for the Cisco Unified 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 3-1](#).

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

- Assign the Softkey template: Standard 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 3-1.

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

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



**Note** Cisco Unified IP Phone model 7960 phone button templates include expansion module lines.

- 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 manager or assistant phones, see the “[Adding Lines to Existing Phones and UDPs](#)” section on page 10-8. Use the line settings as specified in these sections:
    - [Manager Phones in Shared Line Mode, page 28-7](#)
    - [Assistant Phones in Shared Line Mode, page 28-8](#)
  2. After you configure the phones and lines for managers and assistants, you associate the manager and assistant lines for Unified CM Assistant control. Follow the procedures in the “[Creating the CSV Data File for Manager-Assistant Associations](#)” section on page 28-9.

## Manager and Assistant Shared Line Configurations

BAT associates Cisco Unified CM 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 phone that have the same directory numbers and partitions as the primary lines on the manager 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 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 Unified CM Assistant associations only to those assistants that are also using shared line mode.

**Additional Topics**

See the [“Related Topics” section on page 28-12](#).

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

When you use BAT to insert manager-assistant associations to the Cisco Unified Communications Manager 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-Assistants Associations, page 28-9](#)
- Using a text editor to create a text file in CSV format by using the [“Managers and Assistants File Formats” section on page A-12](#).

When you create an association for a new manager, you need to enter a device name. When you update a manager with an existing Unified CM Assistant record, consider these fields optional. See the [“Manager and Assistant Proxy Line Configurations” section on page 28-3](#) 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 if the number of manager lines is greater than or equal to three.

## 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 1-8](#).

To use the BAT spreadsheet for adding new Unified CM 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 28-10](#).

For the default line configurations for the manager and assistant phones, see [Table 28-3](#) and [Table 28-4](#).

- 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 28-11.

## 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** Download and open the **BAT.xls** file to open the BAT spreadsheet. See the “[Downloading a File](#)” section on page 2-2.
- Step 2** When prompted, click **Enable Macros** to use the spreadsheet capabilities.
- Step 3** To display the manager-assistant association options, click the **Default Managers-Assistants** tab at the bottom of the spreadsheet.
- 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 that are 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.

Upload the CSV data file to the first node of Cisco Unified Communications Manager, so BAT can access the CSV data file. See the [“Uploading a File” section on page 2-3](#).

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

#### Additional Topics

See the [“Related Topics” section on page 28-12](#).

## 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

- Step 1** Download the **BAT.xls** file from Cisco Unified Communications Manager server. See the [“Downloading a File” section on page 2-2](#).
- Step 2** Open the **BAT.xls** file. 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 that are 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 that are 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 that are 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.

Upload the CSV data file to the first node of Cisco Unified Communications Manager, so BAT can access the CSV data file. See the [“Uploading a File” section on page 2-3](#).

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 Topics

See the [“Related Topics” section on page 28-12](#).

## Related Topics

- [Overview of Phones and Lines for Use with Cisco Unified Communications Manager Assistant, page 28-1](#)
- [Creating the CSV Data File for Manager-Assistant Associations, page 28-9](#)
- [Inserting Manager-Assistant Associations to Cisco Unified Communications Manager, page 29-1](#)
- [Configuring Phones in Proxy Line Mode for Cisco Unified Communications Manager Assistant, page 28-2](#)
- [Configuring Phones in Shared Line Mode for Cisco Unified Communications Manager Assistant, page 28-7](#)
- [Deleting Manager-Assistant Associations from Cisco Unified Communications Manager, page 30-1](#)
- [Deleting Managers from Cisco Unified Communications Manager, page 31-1](#)
- [Deleting Assistants from Cisco Unified Communications Manager, page 32-1](#)

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

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- *Cisco Unified Communications Manager Assistant User Guide*