Cisco Unified Attendant Console Standard - Installation and Configuration Guide

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CONTENTS

About This Guide  i
  Who Should Read This Guide  i
  How This Guide is Organized  i
  Document Conventions  ii
  Obtaining Documentation and Submitting Service Requests  ii

CHAPTER 1
Introduction to Cisco Unified Attendant Console Standard  1-1
  Accessibility for Users with Disabilities  2
  Cisco Unified Attendant Console Standard User Interface  1-2
  Accessing Help on the Application  1-3

CHAPTER 2
Installing Cisco Unified Attendant Console Standard  2-1
  PC Hardware and Software Requirements  2-1
    Operating System Support  2-2
    Citrix Support  2-2
    Jabber Support  2-2
    Network Requirements  2-2
    Virus Scan Exclusions  2-2
    Windows Folder Permissions  2-3
    Scalability  2-3
      Directory Synchronization  2-3
      Presence  2-4
  Cisco Unified Communications Manager Compatibility  2-4
  Configuring Cisco Unified Communications Manager  2-5
    Creating a User Group (CUCM 7.x and 8.x)  2-5
    Creating an Access Control Group (CUCM 9.x and 10.x)  2-6
    Assigning Roles to a User Group or Access Control Group  2-6
    Creating and Assigning an Application User  2-7
    Assigning Devices to Application Users to Enable Directory BLF  2-7
    End User Account Required For Presence  2-8
  Installing or Upgrading Cisco Unified Attendant Console Standard  2-8
  Installing and Configuring the Cisco TSP for Cisco Unified Communications Manager 7.x  2-10
    Downloading and Installing the TSP  2-10
    Configuring the TSP  2-11
Directory Field Mappings 5-6
   Destination Fields  5-6
   Source Fields  5-7
   Setting Directory Field Mappings  5-7
BLF Rules  5-7
   Adding BLF Rules  5-8
   Editing BLF Rules  5-9
   Deleting BLF Rules  5-9
   Reordering BLF Rules  5-10
Directory Groups  5-10
   Creating Directory Groups  5-10
   Deleting Directory Groups  5-11
   Renaming Directory Groups  5-11
   Importing Contacts Into Directory Groups  5-12
   Manually Adding Contacts To Directory Groups  5-13
   Deleting Contacts From Directory Groups  5-14
   Editing Contacts In Directory Groups  5-14
   Exporting Contacts From Directory Groups  5-15
Viewing and Using Directories  5-16
   Changing the Directory View  5-16
   Searching For Contacts  5-17
   Search Preferences  5-17
   Viewing Contact Information  5-18
Contact Notes  5-18
   Adding Contact Notes  5-18
   Editing Contact Notes  5-19
   Deleting Contact Notes  5-19

CHAPTER 6

Keyboard Shortcuts  6-1
   Defining and Editing Keyboard Shortcuts  6-2
   Removing Keyboard Shortcuts  6-3
   Resetting Shortcuts to their Default Values  6-3

APPENDIX A

Configuring Logging  A-1

APPENDIX B

Import/Export File Formats  B-1
   XML File Format  B-1
   CSV File Formats  B-2
About This Guide

This guide describes how to install and configure Cisco Unified Attendant Console Standard.

Who Should Read This Guide

This guide is for deployment engineers, system administrators, and anyone else who installs or configures Cisco Unified Attendant Console Standard. You should have a knowledge of how to configure the Cisco Unified Communications Manager used by the application.

How This Guide is Organized

This guide contains the following sections.

<table>
<thead>
<tr>
<th>Section</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 1, “Introduction to Cisco Unified Attendant Console Standard”</td>
<td>Introduction to Cisco Unified Attendant Console Standard</td>
</tr>
<tr>
<td>Chapter 2, “Installing Cisco Unified Attendant Console Standard”</td>
<td>Preparing Cisco Unified Communications Manager and installing Cisco Unified Attendant Console Standard</td>
</tr>
<tr>
<td>Chapter 3, “Starting Cisco Unified Attendant Console Standard”</td>
<td>Starting Cisco Unified Attendant Console Standard and configuring operator details</td>
</tr>
<tr>
<td>Chapter 4, “Configuring Cisco Unified Attendant Console Standard”</td>
<td>Configuring Cisco Unified Attendant Console Standard, including managing sign in devices</td>
</tr>
<tr>
<td>Chapter 5, “Directories”</td>
<td>Using and controlling directories</td>
</tr>
<tr>
<td>Chapter 6, “Keyboard Shortcuts”</td>
<td>Setting up keyboard shortcuts</td>
</tr>
<tr>
<td>Appendix A, “Configuring Logging”</td>
<td>Configuring application logging</td>
</tr>
<tr>
<td>Appendix B, “Import/Export File Formats”</td>
<td>Formats of import and export files</td>
</tr>
<tr>
<td>Appendix C, “Phones Supported by Cisco Unified Attendant Console Standard”</td>
<td>List of supported Cisco phones</td>
</tr>
</tbody>
</table>
Document Conventions

The following textual and typographic conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>bold</strong> font</td>
<td>Commands, keywords and user-entered text appear in <strong>bold</strong> type.</td>
</tr>
<tr>
<td><em>italic</em> font</td>
<td>Document titles, new or emphasized terms, and arguments for which you supply values are in <em>italic</em> font.</td>
</tr>
<tr>
<td>[]</td>
<td>Elements in square brackets are optional.</td>
</tr>
<tr>
<td>{x</td>
<td>y</td>
</tr>
<tr>
<td>[x</td>
<td>y</td>
</tr>
<tr>
<td>string</td>
<td>A non-quoted set of characters. Do not use quotation marks around the string or the string will include the quotation marks.</td>
</tr>
<tr>
<td>courier font</td>
<td>Terminal sessions and information the system displays appear in courier font.</td>
</tr>
</tbody>
</table>

- **Note**
  Means *reader take note.*

- **Tip**
  Means *the following information will help you solve a problem.*

- **Caution**
  Means *reader be careful.* In this situation, you might do something that could result in equipment damage or loss of data.

- **Timesaver**
  Means *the described action saves time.* You can save time by doing what is described in the paragraph.

- **Warning**
  Means *reader be warned.* In this situation, you might do something that could result in bodily injury.

Obtaining Documentation and Submitting Service Requests


Subscribe to the *What’s New in Cisco Product Documentation* as a Really Simple Syndication (RSS) feed and set content to be delivered directly to your desktop using a reader application. The RSS feeds are a free service and Cisco currently supports RSS Version 2.0.
Introduction to Cisco Unified Attendant Console Standard

Cisco Unified Attendant Console Standard is a Microsoft Windows-based operator attendant console application for use with Cisco Unified Communications Manager (CUCM). For details of the supported versions, see Cisco Unified Communications Manager Compatibility, page 2-4. Cisco Unified Attendant Console Standard supports up to 5000 contacts on a single instance.

Cisco Unified Attendant Console Standard enables you to do the following:

- Control calls on your local IP Phone, XMPP client (such as Jabber), or Cisco IP Communicator
- Make, answer and end calls
- Hold and resume calls
- Blind/consult transfer calls to directory contacts or voicemail, or any other valid number
- Direct transfers
- Join calls
- Set Call Forward and Do Not Disturb on the operator phone
- Park calls
- Create and manage conference calls
- Import custom directories of contacts not in your Cisco Unified Communications Manager directory
- Create custom directories (directory groups) and export them to share with other operators
- Synchronize Cisco Unified Attendant Console Standard’s corporate (main) directory with a CUCM or CSV file source directory
- During synchronization with your source directory:
  - Map the fields from your source directory to the ones in the corporate directory
  - Filter contacts, so that only certain ones are added to the corporate directory
  - Modify contact numbers using BLF rules
- See the line state and presence of each contact
- View call history
- Specify the devices used to sign in to the application
- Log in to a hunt group when you sign in to the application.

Online help on the application is available. For how to display the help, see Accessing Help on the Application, page 1-3.
Accessibility for Users with Disabilities

The Cisco Unified Attendant Console Standard user interface and controls are described in Cisco Unified Attendant Console Standard User Interface, page 1-2.

Cisco Unified Attendant Console Standard incorporates the following features to make it easier for blind and visually impaired people to use it:

- Most functions can be accessed using either the mouse or keyboard. You can define keyboard shortcuts for the most frequently used functions. For more information, see Chapter 6, “Keyboard Shortcuts”.
- You can set the size of call and directory text in the interface.
- A tooltip is displayed for each graphical interface control when you point to it.

For more information on the Cisco Accessibility Program visit http://www.cisco.com/web/about/responsibility/accessibility/contact.html.

Cisco Unified Attendant Console Standard User Interface

You use the Cisco Unified Attendant Console Standard interface to do all the standard operator tasks, including making calls, putting calls on hold, and conferencing calls.

An example of the user interface is shown below:

The legend is on the next page.
Legend

<table>
<thead>
<tr>
<th>#</th>
<th>Name</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Main menu</td>
<td>Controls for using and configuring the application. Many of the controls here are also available when you right-click specific parts of the interface. For example, controls relevant to the directories are displayed when you right-click in the directory pane.</td>
</tr>
<tr>
<td>2</td>
<td>Current console extension</td>
<td>The extension used to sign in to the application. Click this to display a menu that you use for signing out and for logging into and out of hunt groups.</td>
</tr>
<tr>
<td>3</td>
<td>Call Control pane</td>
<td>Active call information on any line on the console phone. The calls in progress are displayed here, along with their status, duration, and controls for frequently used actions, such as transferring or ending the call.</td>
</tr>
<tr>
<td>4</td>
<td>Parked Calls pane</td>
<td>Active parked calls, by default displayed in the order in which they were parked. This pane shows the park extension used, the identities of both the caller and the DN that parked the call, and how long the call has been parked.</td>
</tr>
<tr>
<td>5</td>
<td>Call History pane</td>
<td>Completed calls in the current session, by default listed in reverse chronological order. You can change the order in which completed calls are listed. This pane is not displayed by default; use View &gt; Show Call History to display it.</td>
</tr>
<tr>
<td>6</td>
<td>Search box</td>
<td>Tool in the header bar of the Directory pane for finding contacts by last name, first name, department and number.</td>
</tr>
<tr>
<td>7</td>
<td>Set search preferences</td>
<td>Control how searches are conducted.</td>
</tr>
<tr>
<td>8</td>
<td>Add new directory group</td>
<td>Control for creating a new directory group.</td>
</tr>
<tr>
<td>9</td>
<td>Add contact</td>
<td>Only available for directory groups. Control for adding contacts to directory groups.</td>
</tr>
<tr>
<td>10</td>
<td>Directory pane</td>
<td>Displays the synchronized directory, directory groups and search results. Includes Search box and controls for creating directory groups. Contact information includes line state and presence. For more information, see Chapter 5, “Directories”.</td>
</tr>
</tbody>
</table>

You control the interface using both your mouse and keyboard. Many things that you can do with the mouse you can also do using your keyboard, provided that the application interface is selected.

### Accessing Help on the Application

You can display help about Cisco Unified Attendant Console Standard by doing one of the following:

- In the main menu, choose Help > Cisco Unified Attendant Console Standard Help.
- Press F1.

The Help contains the following to make it easy to find what you need to know:
• Text search tool
• Index
• Contents list.
Installing Cisco Unified Attendant Console Standard

To install Cisco Unified Attendant Console Standard you must do the following:
1. Ensure that the PC running it satisfies the minimum hardware and software requirements. These are described below.
2. Within Cisco Unified Communications Manager, create an Application User with associated phones. If you intend to use the presence facility within Cisco Unified Attendant Console Standard, you must also set up an End User. For instructions, see Configuring Cisco Unified Communications Manager, page 2-5.
3. Install the Cisco Unified Attendant Console Standard software. For instructions, see Installing or Upgrading Cisco Unified Attendant Console Standard, page 2-8.

PC Hardware and Software Requirements

The PC running Cisco Unified Attendant Console Standard has the following minimum hardware requirements:
- 2.4 GHz Core 2 Duo
- 4 GB RAM
- 10 GB available hard drive space
- 100 Mbps network card, connected to the same network as Cisco Unified Communications Manager using TCP/IP
- Monitor with 1024x768 resolution (recommended: monitor with 1440x900 resolution, plus headset)
- Keyboard with 10-key number pad.
Operating System Support

Cisco Unified Attendant Console Standard is supported under the following operating systems:

- Windows Vista Professional with SP2 (32-bit or WoW64)
- Windows 7 (32-bit or WoW64) – integration with Cisco Unified Communications Manager versions 7.1(5) or 8.0(x) is not supported under this operating system
- Windows 8 (32-bit or WoW64) – you can integrate only with Cisco Unified Communications Manager version 10.0(1) or 10.5(1) under this operating system
- Windows 8.1 (32-bit or WoW64) – you can integrate only with Cisco Unified Communications Manager version 10.5(1) under this operating system

For a summary of the operating systems and Cisco Unified Communications Manager versions compatible with Cisco Unified Attendant Console Standard, see the table on page 2-4.

Note

If your machine uses a 64-bit operating system, you cannot run Cisco Unified Attendant Console Standard against Cisco Unified Communications Manager version 7.1(5), as this does not support the 64-bit TSP required for the systems to be able to communicate with each other.

Citrix Support

Cisco Unified Attendant Console Standard is not supported within a Citrix environment.

Jabber Support

Both standard Jabber installations (locally installed on the operator computer) and VXME installations (installed in a VXME environment) are supported as operator devices and end points.

Network Requirements

The computer running Cisco Unified Attendant Console Standard must be able to access the Cisco Unified Communications Manager and the Cisco Unified Presence (CUP) Server. By default, these use the following two-way TCP ports:

- Cisco Unified Communications Manager – Port 443
- Cisco Unified Presence (CUP) Server – Port 5222

If you have a firewall on your computer, you must configure firewall exceptions for these ports or for any alternatives you may use in your installation.

Virus Scan Exclusions

To prevent key system files from being quarantined by your anti-virus software, add the following folders to your virus scan exclusions:

- %Program Files%\Cisco\Cisco Unified Attendant Console Standard (under 32-bit operating systems)
Chapter 2      Installing Cisco Unified Attendant Console Standard

PC Hardware and Software Requirements

- \Program Files (x86)\Cisco\Cisco Unified Attendant Console Standard (under 64-bit operating systems)
- \Users\windows user name\AppData\Roaming\CUACS\Layout
- \ProgramData\CUACS

Windows Folder Permissions

Under Microsoft Windows Vista (32/64-bit), Windows 7 (32/64-bit SP1), Windows 8 (Desktop mode) and Windows 8.1 (64-bit), the following folders require the specified permissions set on them:

- \Program Files (x86)\Cisco\Cisco Unified Attendant Console Standard
- \Users\<windows_user_name>\AppData\Roaming\CUACS\Layout
- \Users\<windows_user_name>\AppData\Roaming\CUACS\Logging
  - Modify
  - Read & execute
  - List folder contents
  - Read
  - Write (Windows 8.1 only)
  - Special permissions (Windows 8.1 only)
- \ProgramData\CUACS
  - Modify
  - Read & execute
  - List folder contents
  - Read
  - Write
  - Special permissions

Scalability

Cisco Unified Attendant Console Standard supports up to 5000 contacts on a single instance

Directory Synchronization

Although the recommended maximum Cisco Unified Attendant Console Standard directory size is 5000 contacts, there is no theoretical limit to the number that can be stored. However, if many users (say 500) with large directories (say 50000 contacts) simultaneously try to synchronize with Cisco Unified Communications Manager it would struggle to cope.

Note

Cisco Unified Communications Manager's User and CTI (TSP client) resources are perfectly adequate to support this many concurrent Cisco Unified Attendant Console Standard users.

If you do have many concurrent Cisco Unified Attendant Console Standard users who are synchronizing more than the recommended maximum number of contacts, we recommend that these users:
Chapter 2 Installing Cisco Unified Attendant Console Standard

Presence

Cisco Unified Attendant Console Standard uses its user’s personal Jabber credentials to enable presence indicators in its directory. So long as hundreds of users are not sharing the same Jabber credentials, the load on the presence server will be distributed, and there will be no problems with presence.

Cisco Unified Communications Manager Compatibility

Cisco Unified Attendant Console Standard is compatible with the Cisco Unified Communications Manager versions shown in the table on page 2-4.

If you are using Cisco Unified Communications Manager Release 8 or later, the TSP and New Cisco Media Driver are automatically installed and activated when you install Cisco Unified Attendant Console Standard. However, Cisco Unified Communications Manager Release 7.1.5 does not support this silent TSP installation, and you must manually download and install the appropriate TSP and Cisco TAPI Wave driver according to the instructions in Installing and Configuring the Cisco TSP for Cisco Unified Communications Manager 7.x, page 2-10.

Note

The following:

- The 32-bit version of TSP is required when running Cisco Unified Attendant Console under a 32-bit operating system. The 64-bit version of TSP is required when running Cisco Unified Attendant Console under a 64-bit operating system. Consequently, 64-bit installations are supported only in conjunction with Cisco Unified Communications Manager versions later than 8.0(3).
- If the installation wizard is unable to download the TSP, you can fix the problem by doing the following:
  a. In your web browser, under Tools, choose Internet Options.
  b. In the dialog box, select the Advanced tab.
  e. Click OK.

Cisco Unified Attendant Console Standard also integrates with the Cisco Unified Presence Server. The operating system and Cisco Unified Communications Manager (CUCM) version compatibility is summarized below:

<table>
<thead>
<tr>
<th>CUCM Version</th>
<th>Windows Vista 32-bit and WoW 64</th>
<th>Windows 7 32-bit and WoW 64</th>
<th>Windows 8 32-bit and WoW 64</th>
<th>Windows 8.1 32-bit and WoW 64</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1(5)</td>
<td>Supported</td>
<td>Not supported</td>
<td>Not supported</td>
<td>Not supported</td>
</tr>
<tr>
<td>8.0(1)</td>
<td>Supported</td>
<td>Not supported</td>
<td>Not supported</td>
<td>Not supported</td>
</tr>
<tr>
<td>8.0(3)</td>
<td>Supported</td>
<td>Not supported</td>
<td>Not supported</td>
<td>Not supported</td>
</tr>
</tbody>
</table>
Cisco Unified Attendant Console Standard must be able to communicate with the Cisco Unified Communications Manager, which it does using Cisco Unified Communications Manager TSP. Consequently, before you install Cisco Unified Attendant Console Standard you must first perform the following steps:

1. Depending on the version of Cisco Unified Communications Manager you are using, either:
   - Creating a User Group (CUCM 7.x and 8.x), page 2-5 – instructions for users of Cisco Unified Communications Manager 7.x or 8.x.
   - Creating an Access Control Group (CUCM 9.x and 10.x), page 2-6 – instructions for users of Cisco Unified Communications Manager 9.x, 10.0(1) or 10.5(1).

2. Assigning Roles to a User Group or Access Control Group, page 2-6


### Configuring Cisco Unified Communications Manager

Cisco Unified Attendant Console Standard must be able to communicate with the Cisco Unified Communications Manager, which it does using Cisco Unified Communications Manager TSP. Consequently, before you install Cisco Unified Attendant Console Standard you must first perform the following steps:

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   - Creating an Access Control Group (CUCM 9.x and 10.x), page 2-6 – instructions for users of Cisco Unified Communications Manager 9.x, 10.0(1) or 10.5(1).

2. Assigning Roles to a User Group or Access Control Group, page 2-6


#### Creating a User Group (CUCM 7.x and 8.x)

If you are using Cisco Unified Communications Manager 7.x or 8.x you must create a User Group. If you are using Cisco Unified Communications Manager 9.x, 10.0(1) or 10.5(1) you must create an Access Control Group, as described in Creating an Access Control Group (CUCM 9.x and 10.x), page 2-6.

User groups define the roles and permissions available to the Application Users who are members of that group.

To create a User Group, do the following:

**Step 1** Use your internet browser to access Cisco Unified CM Administration, and then log in.

**Step 2** In the main menu, choose User Management > User Groups.

**Step 3** Click Add New to create a new User Group.

**Step 4** Type a Name for the new User Group.
Chapter 2  Installing Cisco Unified Attendant Console Standard

Configuring Cisco Unified Communications Manager

Step 5  Click Save to save the User Group.
Step 6  Assign roles to the user group, as described in Assigning Roles to a User Group or Access Control Group, page 2-6.

Creating an Access Control Group (CUCM 9.x and 10.x)

If you are using Cisco Unified Communications Manager 9.x, 10.0(1) or 10.5(1) you must create an Access Control Group. If you are using Cisco Unified Communications Manager 7.x or 8.x you must create a User Group, as described in Creating a User Group (CUCM 7.x and 8.x), page 2-5.

Access Control Groups define the roles and permissions available to the Application Users who are members of that group.

To create an Access Control Group, do the following:

Step 1  Use your internet browser to access Cisco Unified CM Administration, and then log in.
Step 2  In the main menu, choose User Management > User Settings > Access Control Group.
Step 3  Click Add New to create a new Access Control Group.
Step 4  Type a Name for the new Access Control Group.
Step 5  Click Save to save the Access Control Group.
Step 6  Assign roles to the user group, as described in Assigning Roles to a User Group or Access Control Group, page 2-6.

Assigning Roles to a User Group or Access Control Group

Roles define what the members (Application Users) of a User Group or Access Control Group can do. To add the roles to a User Group or Access Control Group required to enable Cisco Unified Attendant Console Standard to work properly, do the following:

Step 1  On the Find and List User Groups page, Find the User Group/Access Control Group you just created.
Step 2  In the Search Results, click Roles for the User Group/Access Control Group.
Step 3  Click Assign Role to Group.
Step 4  Select the following roles:
  • Standard AXL API Access
  • Standard CTI Allow Calling Number Modification
  • Standard CTI Allow Call Park Monitoring
  • Standard CTI Allow Control of All Devices
  • Standard CTI Allow Reception of SRTP Key Material
  • Standard CTI Enabled
### Configuring Cisco Unified Communications Manager

Step 5
If you are using phone models 69xx, 7931, 7965, 89xx and 99xx, you must also select:
- **Standard CTI Allow Control of Phones supporting Connected Xfer and conf**
- **Standard CTI Allow Control of Phones supporting Rollover Mode**

Step 6
Click **Add Selected** to assign the roles.

### Creating and Assigning an Application User

An Application User connects Cisco Unified Attendant Console Standard to the Cisco Unified Communications Manager using Cisco TSP and AXL.

- One operator requires a single Application User with all required devices assigned to it.
- Multiple operators using the same devices require a single Application User with all devices required by all operators assigned to it.
- Multiple operators using different devices require multiple Application Users, each with the required devices assigned to it. Operators requiring identical devices can use a single Application User.

To create an Application User and then assign it to the User Group (CUCM 7.x or 8.x) or Access Control Group (CUCM 9.x or 10.x), do the following:

**Step 1**
Use your internet browser to access Cisco Unified CM Administration, and then log in.

**Step 2**
In the main menu, choose **User Management > Application User**.

**Step 3**
Click **Add New**.

**Step 4**
Enter information in the following fields:

- **User ID** (a name of your choice)
- **Password**
- **Confirm Password** (this must match the Password)

**Step 5**
Depending on the version of Cisco Unified Communications Manager you are connecting to, do one of the following:

- If you are installing against Cisco Unified Communications Manager 7.x or 8.x, scroll down to the Permissions Information section and click **Add to User Group**.
- If you are installing against Cisco Unified Communications Manager 9.x or 10.x, scroll down to the Permissions Information section and click **Add to Access Control Group**.

**Step 6**
Click **Save** to save the Application User.

### Assigning Devices to Application Users to Enable Directory BLF

To be able to see your contacts’ line state in the directory you must assign their devices to be controlled by the relevant Application User.

To assign controlled devices to an Application User, do the following:
Installing or Upgrading Cisco Unified Attendant Console Standard

These instructions apply to both installing Cisco Unified Attendant Console Standard from scratch and upgrading your installation. When you upgrade your software the installation Wizard offers you details of your current installation, which you can accept or change, as required. You do not need to uninstall the old version before installing the new software.

Cisco Unified Attendant Console Standard requires .NET framework 4 to run. If .NET framework 4 has not been supplied or configured before installation, the installation wizard installs and configures it for you.

Note

To be able to install the software you must have administrator rights.

To install Cisco Unified Attendant Console Standard, do the following:

Step 1
Browse to the installation location and run CUACS_Setup.exe.

The installation wizard appears.

Step 2
In the Welcome page, click Next.

Step 3
In the Cisco Unified Communications Manager Connection Details page, type the following:

- The Cisco Unified Communications Manager Host Name, Fully Qualified Domain Name (FQDN) or IP address
Chapter 2  Installing Cisco Unified Attendant Console Standard

Installing or Upgrading Cisco Unified Attendant Console Standard

The Cisco Unified Communications Manager Application User ID to use

The Password that corresponds with the Cisco Unified Communications Manager User ID.

and then click Next.

If you are upgrading your Cisco Unified Attendant Console Standard software, this page will contain your current details.

Note

The following:

Port 443 is used by default. You can change the Cisco Unified Communications Manager configuration after you have installed Cisco Unified Attendant Console Standard. For instructions, see Connecting to a Different Cisco Unified Communications Manager, page 4-4.

Connecting to the Cisco Unified Communications Manager also populates the Primary CTI Manager. If you want to use a different node as the Primary CTI Manager, you can do this through the Cisco TSP configuration after installing Cisco Unified Attendant Console Standard.

Step 4

In the two Security Alert messages, click Yes.

Note

During installation the Cisco Unified Communications Manager TSP appropriate to the Cisco Unified Communications Manager you intend to use is downloaded. If you intend to use Cisco Unified Communications Manager release 8.0(1) or later, the TSP is also automatically installed. If you intend to use Cisco Unified Communications Manager release 7.1(5) you must manually install the compatible Cisco TSP, as described in Installing and Configuring the Cisco TSP for Cisco Unified Communications Manager 7.x, page 2-10.

Step 5

In the Language Information page, select the language you want to use, and then click Next.

If you are upgrading your Cisco Unified Attendant Console Standard software, this page will contain your current details.

Step 6

In the Cisco Unified Presence Server Connection Information page, type the following:

° The Server Address or URL required for hosted presence.
° The Domain containing the server
° The Cisco Unified Presence User Name to use
° The Cisco Unified Presence Password appropriate to the User Name

and then click Next.

If you are upgrading your Cisco Unified Attendant Console Standard software, this page will contain your current details.

Note

Port 5222 is used by default. You can change the Presence configuration after you have installed Cisco Unified Attendant Console Standard. For instructions, see Connecting to a Different Presence Server, page 4-3.

Step 7

In the Choose Destination Location page, either accept the default folder (recommended) or Browse to the folder in which to install the application, and then click Next.

Step 8

In the Start Copying Files page, if the details are correct, click Next. If not, click Back and correct the information.
Chapter 2 Installing Cisco Unified Attendant Console Standard

Installing and Configuring the Cisco TSP for Cisco Unified Communications Manager 7.x

Cisco Unified Attendant Console Standard is installed.

Step 9 In the InstallShield Wizard Complete page, select Yes, I want to restart my computer now, and then click Finish.

Installing and Configuring the Cisco TSP for Cisco Unified Communications Manager 7.x

The Cisco TAPI (or Telephony) Service Provider (TSP) enables Cisco Unified Attendant Console Standard to communicate with the Cisco Unified Communications Manager CTI Manager service, which provides call control.

Cisco Unified Attendant Console Standard installation also automatically installs the Cisco TSP appropriate to your Cisco Unified Communications Manager—unless you are using Cisco Unified Communications Manager Release 7.x, in which case you must manually install the Cisco TSP for that release.

This appendix describes the following steps:

1. Downloading and Installing the TSP.
2. Configuring the TSP, page 2-11.
3. Installing the Cisco TAPI Wave Driver, page 2-11.

If you need to uninstall the Cisco TSP, follow the instructions in the file C:\Program Files\Cisco\CiscoTSP.txt, which is created when the TSP is installed. This file also includes instructions for installing the Cisco TAPI Wave driver.

Download and Installing the TSP

To download and install the Cisco TSP, do the following:

Step 1 Use your internet browser to access Cisco Unified Communications Manager Administration, and then choose Application > Plug ins.

Step 2 Find the Cisco Telephony Service Provider using the search field (Figure 2-1).

Figure 2-1 Find and List Plugins Search Options

Step 3 In the Search Results, click Download on the Cisco Telephony Service Provider line.

Step 4 Save CiscoTSP.exe on your desktop.

Step 5 Double-click the CiscoTSP.exe icon on your desktop and follow the instructions.

Step 6 During installation, you are asked if you want to install multiple instances of TSP; click No.
Chapter 2  Installing Cisco Unified Attendant Console Standard

Installing and Configuring the Cisco TSP for Cisco Unified Communications Manager 7.x

Step 7  After a successful installation, restart your system for the changes to take effect.

Configuring the TSP

To configure TSP, do the following:

Step 1  Click the Start button, and then in the Start menu, choose Settings > Control Panel > Phone and Modem Options.

Step 2  Select the Advanced tab.

Step 3  Select CiscoTSP001.tsp.

Step 4  Click Configure, and then select the User tab.

Step 5  In User Name, type the User ID of the Cisco Unified Communications Manager Application User created in Configuring Cisco Unified Communications Manager, page 2-5.

Step 6  Type the Password, and then again in Verify Password.

Step 7  Select the CTI Manager tab.

Step 8  Under Primary CTI Manager Location, select and then type either the IP Address or Host Name of the CTI Manager to connect to. If a second CTI Manager is available, you can optionally specify a Backup CTI Manager Location.

Note  The CTI Manager service runs on each CUCM node in a cluster. Your primary CTI Manager should be on the Cisco Unified Communications Manager publisher, and your backup CTI Manager on the subscriber.

Step 9  Select the Wave tab.

Step 10  Type the Desired number of possible Automated Voice lines. Specify sufficient to allow all your CTI Ports to be monitored by this TSP. You can specify a larger number to cater for future expansion. To change the number in the future, you will have to uninstall and reinstall the Cisco TAPI Wave driver.

Step 11  Click OK.

Step 12  Select the Advanced tab.

Step 13  In Provider Open Completed Timeout (secs), type 300.

Step 14  Click OK.

Step 15  Reboot the machine.

You now need to install the Cisco TAPI Wave driver.

Installing the Cisco TAPI Wave Driver

To install the Cisco TAPI Wave driver, do the following, or the equivalent for your operating system:

Step 1  In Control Panel, double-click Add/Remove Hardware.

Step 2  In the Add Hardware wizard, click Next.
Step 3  Select Yes, I have already connected the hardware.
Step 4  Select Add a New Hardware Device, and then click Next.
Step 5  Select Install the hardware that I manually select from a list, and then click Next.
Step 6  From the list of hardware types, select Sound, video and game controller, and then click Next.
Step 7  When prompted to select the device driver, click Have Disk.
Step 8  In the Install From Disk dialog box, Browse to C:\Program Files\Cisco Systems\Wave Drivers, select the file oemsetup.inf, and then click Open.
Step 9  Click OK.
Step 10 In the Select a Device Driver page, select the Cisco TAPI Wave Driver, and then click Next.
Step 11 In the Start Hardware Installation page, click Next.
Step 12 If prompted for Digital signature Not Found, click Continue Anyway.
Step 13 If prompted The file avaudio32.dll on Windows NT Setup Disk #1 is needed, browse to C:\Program Files\Cisco\Wave Drivers, and then click OK.
Step 14 Click Yes.
Step 15 Click Finish.
Step 16 When prompted, click Yes to restart your computer.

Licensing Cisco Unified Attendant Console Standard

This section describes how to license your Cisco Unified Attendant Console Standard software under these scenarios:

- Installing Cisco Unified Attendant Console Standard from scratch. For more information, see Licensing New Installations, page 2-12.
- Upgrading an existing Cisco Unified Attendant Console Department Edition installation to Cisco Unified Attendant Console Standard. For more information, see Licensing CUAC Department Edition Upgrades, page 2-14.

Note: You do not need to relicense Cisco Unified Attendant Console Standard version upgrades.

This section also describes:

- Activating Purchased or Upgraded Software, page 2-15
- Relicensing Software, page 2-17

Licensing New Installations

When you install Cisco Unified Attendant Console Standard onto a new system (not an upgrade) you may need to use the following procedures:

- Activating Evaluation Software
- Activating Purchased or Upgraded Software, page 2-15
Activating Evaluation Software

You can use downloaded software for 10 days before you must license it. Licensing the software enables you to activate the software for 60 more days of evaluation. If you do not activate the download, you will be unable to use it after the tenth day.

To activate the evaluation software, do the following:

**Step 1**
Sign in to each instance of Cisco Unified Attendant Console Standard that you want to license and activate, and then do the following:


b. In the information box, click Register.

c. Note the Machine Code. This is the registration code for that instance.

---

**Tip**
Keep these codes safe, as you require them to activate the 60 evaluation period and to license purchased software.

---

**Step 2**
Use your internet browser to go the Cisco Unified Attendant Console Downloads and Licensing website.

**Step 3**
Enter your User Name and Password, and then click Log In.

**Step 4**
In the navigation bar, click ACTIVATE EVALUATION SOFTWARE.

**Step 5**
Select your Reseller, then select your Customer, and then select your Customer Site.

---

**Note**
If your reseller, customer or site are not available, choose the options to add them.

---

**Step 6**
Select the Version and the Product that you have installed, and then click Next.

**Step 7**
Enter the Registration Codes collected in Step 1, and then click Next.

---

**Note**
Click to create new fields for additional codes.

---

**Step 8**
Enter any additional email addresses to receive the registration file, and then click Submit.

If the registration codes are valid, a registration (.RGF) file is e-mailed to you. The .RGF file contains activation keys and serial numbers for the 60 day evaluation period. The .RGF file can hold licensing information for multiple instances, but each license needs to be individually applied.

**Step 9**
Open the email and save the .RGF file to a location that can be browsed by Cisco Unified Attendant Console Standard.

**Step 10**
In Cisco Unified Attendant Console Standard, do one of the following:

- In the main menu, choose Help > About Cisco Unified Attendant Console Standard.

- Use the keyboard shortcut you have defined, as described in Defining and Editing Keyboard Shortcuts, page 6-2.

**Step 11**
In the message box, click Register.

**Step 12**
In the License dialog box, either:

a. Select File Registration.

b. Type the name of or browse to the .RGF file.
c. Click Validate.

or – if you know details of the license for the specific instance you are licensing

a. Select Key Registration.

b. Type an activation key Serial Number, which is included with the license in the .RGF file.

c. Type the corresponding Registration Code.

d. Click Register.

Arc Solutions Software Procurement ADMINISTRATION web site

**Licensing CUAC Department Edition Upgrades**

If you have an upgrade agreement, you can upgrade any Cisco Unified Attendant Console Department Edition (version 8.x or 9.x) installations to Cisco Unified Attendant Console Standard. To do so, you need to obtain the necessary number of Cisco Unified Communications Software Subscription (UCSS) licenses: one per instance.

If you have the necessary rights, you can obtain the licenses through the S+ Admin Website, where you can generate licenses one at a time or in groups.

**Generating Single Licenses**

To generate a single license:

<table>
<thead>
<tr>
<th>Step 1</th>
<th>User your internet browser to go to the Arc Solutions Software Procurement ADMINISTRATION web site and choose Licenses &gt; Generate License.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>In Product Family, select Cisco Unified Attendant Console Standard.</td>
</tr>
<tr>
<td>Step 3</td>
<td>In Product Name, select Console Selection - CUACS.</td>
</tr>
<tr>
<td>Step 4</td>
<td>In Version, select 10.x.</td>
</tr>
<tr>
<td>Step 5</td>
<td>In License Type, select UCSS.</td>
</tr>
</tbody>
</table>
| Step 6 | Click Add, and then type the license order details:  
  - Sale Order Number (mandatory)  
  - Note  
  - Ship Set  
  - Line  
  - Unit Number |
| Step 7 | Click Generate Single License.  
The License Code (LAC) is displayed. |
| Step 8 | Save the LAC for future use. |
Generating Bulk Licenses

To generate a group of licenses:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Use your internet browser to go to the Arc Solutions Software Procurement ADMINISTRATION web site and choose Licenses &gt; Bulk Generate.</td>
</tr>
<tr>
<td>2</td>
<td>In Product Family, select Cisco Unified Attendant Console Standard.</td>
</tr>
<tr>
<td>3</td>
<td>In Product Name, select Console Selection - CUACS.</td>
</tr>
<tr>
<td>4</td>
<td>In Version, select 10.x.</td>
</tr>
<tr>
<td>5</td>
<td>In License Type, select UCSS.</td>
</tr>
<tr>
<td>6</td>
<td>Type the Number of License Codes to create (one per instance of Cisco Unified Attendant Console Standard).</td>
</tr>
<tr>
<td>7</td>
<td>In File Format, select Excel Workbook (.xls).</td>
</tr>
<tr>
<td>8</td>
<td>When prompted open or save the XLS file.</td>
</tr>
</tbody>
</table>

Activating Purchased or Upgraded Software

You can purchase the software at any time in the evaluation period, giving you unlimited use. When you purchase the software Cisco provides you with a 27-digit license activation code (LAC) for each instance of the application you have purchased. After activating the software, you cannot revert to the trial version. If you upgrade your software from Cisco Unified Attendant Console Department Edition, you must activate it before you can use it.

**Note**

When you upgrade using UCSS licenses you can convert Cisco Unified Attendant Console Department Edition license instances into the same number of Cisco Unified Attendant Console Standard instances. You can upgrade either:

- All the Cisco Unified Attendant Console Department Edition seats into Cisco Unified Attendant Console Standard at once.
- Some of the Cisco Unified Attendant Console Department Edition seats and then upgrade the remainder later.

For example, if you had a Cisco Unified Attendant Console Department Edition LAC with 10 seats, you can either activate all 10 LAC codes at once to obtain 10 Cisco Unified Attendant Console Standard licenses, or you can, say, obtain 5 Cisco Unified Attendant Console Standard licenses today and the remainder later. Once you have generated at least one license against the Cisco Unified Attendant Console Department Edition LAC, it becomes disabled and can't be reset.

To activate your purchased or upgraded software, do the following:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Use your internet browser to go the Cisco Unified Attendant Console Downloads and Licensing website.</td>
</tr>
<tr>
<td>2</td>
<td>Enter your User Name and Password, and then click Log In.</td>
</tr>
<tr>
<td>3</td>
<td>In the navigation bar, click ACTIVATE PURCHASED SOFTWARE.</td>
</tr>
</tbody>
</table>
Licensing Cisco Unified Attendant Console Standard

Step 4
Select your Reseller, then select your Customer, and then select your Customer Site.

Note
If your reseller, customer or site are not available, click the control to add them.

Step 5
Select the Version and the Product (CUAC Standard Edition) that you have installed, and then click Next.

Step 6
Enter a unique Registration Code (one of the machine codes collected on page 2-13) and License Activation Code pair for each instance, and then click Next.

Note
Click + to create new fields for any additional pairs of codes.

Step 7
If all the License Activation Codes are UCSS codes for Cisco Unified Attendant Console Standard, enter details of the previously used Cisco Unified Attendant Console Department Edition Registration Code and License Activation Code pairs that you wish to upgrade to Cisco Unified Attendant Console Standard.

Step 8
In the License Request Confirmation page, optionally enter an additional e-mail address and click Submit. If you want to change the codes you entered in Step 6 before proceeding, click Back. A registration (.RGF) file is e-mailed to you, and license request confirmation information is displayed in the web page.

Step 9
Open the email and save the registration file to a location that can be browsed by Cisco Unified Attendant Console Standard.

Step 10
In Cisco Unified Attendant Console Standard, do one of the following:

• In the main menu, choose Help > About Cisco Unified Attendant Console Standard.
• Use the keyboard shortcut you have defined, as described in Defining and Editing Keyboard Shortcuts, page 6-2.

Step 11
In the message box, click Register.

Step 12
In the License dialog box, either:

a. Select File Registration.

b. Type the name of or browse to the .RGF file.

c. Click Validate.

or – if you know details of the license for the specific instance you are licensing

a. Select Key Registration.

b. Type an activation key Serial Number, which is included with the license in the .RGF file.

c. Type the corresponding Registration Code.

d. Click Register.

Resetting License Codes

The registration codes you gather when activating software incorporate information about the system that will be running Cisco Unified Attendant Console Standard. If the system changes - for example, because it has been rebuilt - the parameters will change and the corresponding LACs will no longer work.
You can reset (recreate) LACs to work on new systems in the following way:

**Step 1** Use your internet browser to go to the Arc Solutions Software Procurement ADMINISTRATION web site and choose **License Management**.

**Step 2** Click **Verify and Reset LAC**.

**Step 3** Search for Cisco Unified Attendant Console Standard LAC details using the LAC Code, or look up the LAC using one of the following:
- Cisco SO Number
- Registration Code
- User Name
- Email Address

The Cisco Unified Attendant Console Standard LAC detail is displayed.

**Step 4** If the LAC has been activated (used), select it and then reset it.

### Relicensing Software

If you do any of the following you must re-license the software with a new registration code:
- Reinstall the operating system on the same hardware
- Install a different operating system on the same hardware
- Add or remove certain hardware (such as an NIC card)
- Change the machine name
- Perform a major upgrade of the Cisco Unified Attendant Console Standard software

And within a VM Environment:
- Copy the VM image
- Perform a major upgrade of the Cisco Unified Attendant Console Standard software

All these cause the license to expire, and the System and User Configuration menus to disappear from Cisco Unified Attendant Admin.

To re-license Cisco Unified Attendant Console Standard, contact Cisco TAC and request a re-host. You will need to provide them with either the original license activation codes or the SO number of your purchase.
Starting Cisco Unified Attendant Console Standard

To start the Cisco Unified Attendant Console Standard client, do the following:

Step 1
Double-click the desktop icon.

In the Sign In screen, beneath the banner, a field contains either:
- The extension number of the attendant phone last used to sign in
- The text, *Extension*

Step 2
To use an existing number, proceed to Step 5.

Step 3
To use a new extension number, type the number.

As you type, the application lists those devices available for signing in that match the number (for more information on defining devices, see Managing Sign In Devices, page 4-6). The more you type, the shorter the list becomes. The list contains the name and extension number for each matching device.

Note
If the Device List under the **File > Options > Device List** tab is empty, all devices associated with the application user are available for signing in to Cisco Unified Attendant Console Standard. For more information, see Assigning Devices to Application Users to Enable Directory BLF, page 2-7.

If the Device List contains one or more devices, you can sign in using one of them. If all the devices in the Device List are invalid, you will be unable to sign in without the assistance of a system administrator, as described in Accessing Cisco Unified Attendant Console Standard When There Are No Valid Devices, page 3-2.

Step 4
To select a number, highlight it in the list and either press **Enter** or double-click it. You can close the list and clear the selection by pressing **Esc**.

Step 5
If the sign in extension is part of one or more hunt groups, and you want the application to log you into them during sign in, select **Log in to hunt groups at sign in**.

Note
The following:
- If you are already logged into your hunt groups, you do not need to set **Log in to hunt groups at sign in**.
- You cannot log in to a hunt group using an extension that is already being used by another Cisco Unified Attendant Console Standard user.
You can also log in or out of hunt groups as described in Logging In to Hunt groups, page 3-3 and Logging Out of Hunt groups, page 3-3.

---

**Step 6**  
Click **Sign In** or press **Enter**.

The number you are trying to sign in with is checked against the list of valid extensions.

**Step 7**  
Depending on the devices available, you may need to do one of the following

- If there are no valid devices a message is displayed requesting that you contact your system administrator, who will create a valid device following the procedure in Accessing Cisco Unified Attendant Console Standard When There Are No Valid Devices.

- If several valid devices have the same extension number, or if one or more valid devices has multiple lines, a list of the devices and lines is displayed. Select the device and line to use, and then click **OK**.

The main application user interface appears, ready for you to use.

If there was no device list and you entered the extension number of a valid Cisco device, that device and all its lines is added to the device list.

While the application is running, you can change the attendant console operator directory number and whether it is remembered.

---

**Accessing Cisco Unified Attendant Console Standard When There Are No Valid Devices**

If there are no valid devices in the Device List, the system administrator must create at least one - or completely clear the Device List - so that the application can be used.

To access Cisco Unified Attendant Console Standard when no valid device is available, the system administrator should do the following:

**Step 1**  
In the Sign In screen invalid extension message, click **Administrative Override**.

**Step 2**  
Do one of the following:

- When an Options Password has *not* been set, the Options window appears, with the **Device List** tab displayed.
  
  Add one or more new devices, as described in Manually Adding Sign In Devices, page 4-7, or clear all the devices from the list.

- When an Options Password *has* been set, the Options window appears, with the **Options Password** tab displayed.
  
  a. Make the Device List tab accessible as described in Making Options Tabs Accessible, page 4-2.
  
  b. Add one or more new devices, as described in Manually Adding Sign In Devices, page 4-7, or clear all the devices from the list.

**Step 3**  
Close the Options window.

The Sign In screen appears and the operator can use a new device to sign in.
## Signing Out

To sign out from your current attendant console session, do either of the following:

- In the main menu, click the extension number at the top right of the interface, and then select **Sign out of application**.
- Use the **Ctrl+S** keyboard shortcut.

The sign in screen is displayed, and the application continues to run and any synchronization currently in progress continues. When you sign out you are automatically logged out of any hunt groups to which you belong.

To resume using the application, sign in as before.

## Logging In to Hunt groups

A **hunt group** is a group of extensions configured so that an unanswered call to any extension gets forwarded to one of the other lines in the group. Cisco Unified Communications Manager supports hunt groups, and Cisco Unified Attendant Console Standard enables you to sign in using a device that is part of one or more hunt groups, so that calls to the groups can be received through your operator phone.

If you are logged out from any hunt groups you will not receive any calls through the groups.

If you are not logged in to the hunt groups of which your extension is part, you can either log in to them when you sign in to the application (as described on page 3-1), or you can click the extension number at the top right of the interface, and then select **Log in to hunt groups**.

While you are logging in to the hunt group (which may take a few seconds) you will not be able to receive any new calls, but current calls will continue unaffected, and you will be logged in at the end of the current call.

## Logging Out of Hunt groups

If you are logged in to a hunt group, to log out do either of the following:

- Click the extension number at the top right of the interface, and then select **Log out of hunt groups**.
- Use the **Ctrl+I** keyboard shortcut.

Also, when you sign out you are automatically logged out of any hunt groups to which you belong.

While you are logging out you cannot take calls, but current calls will continue unaffected. You will be logged out at the end of the current call.

## Exiting Cisco Unified Attendant Console Standard

To exit Cisco Unified Attendant Console Standard, do one of the following:

- In the main menu, choose **File > Exit**.
- Use the keyboard shortcut you have defined, as described in **Defining and Editing Keyboard Shortcuts**, page 6-2.
- Click the window close button.
Configuring Cisco Unified Attendant Console Standard

This chapter describes how to configure Cisco Unified Attendant Console Standard. All the configuration functions are contained within tabbed pages of the Options window, which you access by choosing File > Options. You can password-protect the following Options tabs:

- Directory Filters
- Directory Mappings
- BLF Rules
- Device List
- Logging

Enabling password protection is described in Preventing Access To Options Tabs, page 4-2; disabling it is described in Making Options Tabs Accessible, page 4-2.

This chapter also describes the following configuration procedures:

- “Setting Operator Details” on page 4-3
- “Connecting to a Different Presence Server” on page 4-3
- “Connecting to a Different Cisco Unified Communications Manager” on page 4-4
- “Setting the Operator Voicemail Prefix” on page 4-5
- “Configuring Alerts” on page 4-5
- “Managing Sign In Devices” on page 4-6

For details of configuring synchronization with Cisco Unified Communications Manager, see Configuring Synchronization, page 5-4.

For details of moving, stretching and hiding parts of the interface, see the Cisco Unified Attendant Console Standard online Help.
Preventing Access To Options Tabs

In the application’s default state, all the Options tabs are accessible by any user. You can use the Options Password to prevent access to the password-protected Options tabs listed on page 4-1.

To prevent access to the password-protected Options tabs:

Step 1  In the main menu, choose File > Options.
The Options window appears.

Step 2  Click the Options Password tab.

Step 3  Select Password Protection.

Step 4  Type the Application Password (the Cisco Unified Communications Manager application user password specified in the Configuration tab, as described in Connecting to a Different Cisco Unified Communications Manager, page 4-4).

Step 5  Click Apply.

Step 6  Click Cancel to close the Options window.
The password-protected Options tabs are now inaccessible.

Making Options Tabs Accessible

You can regain access to the Options tabs listed on page 4-1 by entering the correct Options Password.

To regain access to the password-protected Options tabs:

Step 1  In the main menu, choose File > Options.
The Options window appears.

Step 2  Click the Options Password tab.

Step 3  Type the Application Password (the Cisco Unified Communications Manager application user password specified in the Configuration tab, as described in Connecting to a Different Cisco Unified Communications Manager, page 4-4).

Step 4  Click Authenticate.

If you have entered the password incorrectly, the Application Password field is highlighted, otherwise the Password Protection and Application Password controls appear.

You now have temporary access to the password-protected Options tabs, and you can make and apply changes to their settings. To keep the Options tabs password-protected after you finish modifying the settings, click Cancel to close the Options window, and then skip the rest of this procedure.

Step 5  Clear Password Protection.

Step 6  Type the Application Password.

Step 7  Click Apply.

Step 8  Click Cancel to close the Options window.
Password protection is disabled and all the Options tabs are now accessible.

---

**Note**

If you forget the Options Password, you can either:

- Change the password of the existing Cisco Unified Communications Manager application user
- Create a new application user with a new password

and then validate the credentials under the Configuration tab, and enter the new password under the Options Password tab.

---

**Setting Operator Details**

You set your operator details either when you start Cisco Unified Attendant Console Standard or while it is running.

To set the operator details while Cisco Unified Attendant Console Standard is running, do the following:

**Step 1**
In the main menu, choose **File > Options**.

The Options window appears.

*Note* You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

**Step 2**
Click the **Operator Details** tab.

**Step 3**
Under **Operator Details**, type the **Extension** of the attendant console operator.

*Note* If a Device List is defined (see “Managing Sign In Devices” on page 4-6), the same restrictions as on the sign in extension apply, but the list is not displayed when you start typing.

**Step 4**
Click **Apply**.

---

**Connecting to a Different Presence Server**

Once Cisco Unified Attendant Console Standard is installed, you can connect to a different Presence Server than the one you specified during installation. The Presence Server provides the presence status of directory contacts; you need to have a valid User and Password to communicate with the server.

To connect to a different Presence Server, do the following:

**Step 1**
In the main menu, choose **File > Options**.

The Options window appears.
Connecting to a Different Cisco Unified Communications Manager

**Note**
You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

**Step 2**
Click the **Operator Details** tab.

**Step 3**
Under **Presence Details**, edit the following as required:
- The Presence **Server Address** or URL required for hosted presence.
- The Presence Server **Port** number. By default, this is 5222.
- The **Domain** containing the Presence Server
- The Presence Server **User** name.
- The **Password** that corresponds with the User name.

**Step 4**
Click **Apply**.
The application validates the connection. If this fails, it prompts you for the correct connection details.

**Step 5**
Exit and then restart Cisco Unified Attendant Console Standard for the change to take effect.

---

Connecting to a Different Cisco Unified Communications Manager

**Note**
Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

Once Cisco Unified Attendant Console Standard is installed, you can connect to a Cisco Unified Communications Manager different from the one you specified during installation, and so use a different source directory. However, the new Cisco Unified Communications Manager must be the same major revision as the one specified during installation; you cannot upgrade to a later revision using this method.

To connect to a different Cisco Unified Communications Manager, do the following:

**Step 1**
In the main menu, choose **File > Options**.
The **Options** window appears.

**Note**
You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

**Step 2**
Click the **Configuration** tab.

**Step 3**
Under **Call Manager Detail**, edit the following as required:
- The Cisco Unified Communications Manager **Server Address**.
- The Cisco Unified Communications Manager **Port** number. By default, this is 443.
- The Cisco Unified Communications Manager **Application Username**.
- The **Application Password** that corresponds with the Username.
**Setting the Operator Voicemail Prefix**

**Note**
Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

If your operator uses a separate voicemail number, you define its prefix.

To set the operator voicemail prefix, do the following:

**Step 1**
In the main menu, choose **File > Options**.
The **Options** window appears.

**Note**
You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

**Step 2**
Click the **Configuration** tab.

**Step 3**
Under **Transfer to Voicemail Option**, type the attendant console operator **Voicemail Prefix**.

**Step 4**
Click **Apply**.

---

**Configuring Alerts**

Cisco Unified Attendant Console Standard alerts you when the following events occur (listed in order of precedence):

1. Call is ended (not by console)
2. Device is in service (the console device)
3. Call is ringing at primary device
4. Call is ringing at secondary device
5. Device is out of service (the console device)
6. A system error has occurred

If two or more alerts occur simultaneously, you are alerted about the one with the highest precedence.

Cisco Unified Attendant Console Standard can produce the following visual alerts:

- If the application is not the active window, it becomes the active window and is placed in front of any other open window, ready for you to interact with it.
Managing Sign In Devices

Attendants can only sign in to Cisco Unified Attendant Console Standard using a valid Cisco device, with a device name, extension and line number. For attendants to be able to make calls, the device must also be associated with the Application User/End user configured in the Cisco TSP.

System administrators define which devices are available for attendants to use; these devices constitute the Device List, which is accessible using File > Options > Device List. At start-up and during execution, the application checks whether the devices in the Device List are associated with the Application User/End User configured in the Cisco TSP.

- If they are not, they are marked as invalid. These have a lighter color in the list, and attendants cannot make calls using them.
- If they were previously marked as invalid, but are now associated with the Application/End user, they are marked as valid, and attendants can make calls using them.

Administrators can either manually add devices to the list, or import them from CSV files.

While importing sign in devices from a CSV file, the application checks that each device is associated with the Application/End User configured in the Cisco TSP. If a device is not associated, it is shown as invalid in the Device List.

If additional lines are later associated with a sign in device (using Cisco Unified Communications Manager), they get added to the Device List. After these changes, attendants will still be able to sign in using the old extension.
Manually Adding Sign In Devices

**Note**
Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

To manually add devices:

**Step 1**
Choose File > Options > Device List.

The Device List appears.

**Step 2**
Under Device List, click Add Devices.

**Step 3**
In Search Devices, type a device name. All devices matching what you type are listed; and the more characters you type, the shorter the list becomes. Non-Cisco devices are not listed.

**Step 4**
For each device you want to add, select the Add checkbox.

**Note**
If there are multiple lines on the selected device, all the lines are selected and added to device list.

**Step 5**
Click Apply.

The devices are added to the Device List.

Importing Sign In Devices

**Note**
Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

You can import sign in devices from a CSV file with the format described in CSV Files for Importing Sign In Devices, page B-3.

To import devices from a CSV file:

**Step 1**
Choose File > Options > Device List.

**Step 2**
Under Import From CSV, click Browse and select the file to import.

The file name and path are displayed under File Location.

**Note**
If you click View Sample you can view the required format of the CSV file for importing login devices.

**Step 3**
Click Import Devices.

The file format is validated, and if any devices in the file are non-Cisco, you are informed that they will no be imported, and then you are prompted to continue. To import the Cisco devices from the file, click Yes. To abort the process, click No.
Managing Sign In Devices

The devices are imported and added to the Device List. As the devices are imported, they are checked against those already listed and any matching devices are ignored.

Deleting Sign In Devices

Note: Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

To remove devices:

Step 1 Choose File > Options > Device List.

In the Device List, click the corresponding X in the Delete column.

Note: If a device has multiple lines, all are deleted from the list. The device remains in the database.

Step 2 In the confirmation message, click Yes.
Directories

Cisco Unified Attendant Console Standard displays one or more directories of contacts. Always displayed is your corporate directory (shown in the interface as Directory), which is copied from one or more of the following sources:

- Cisco Unified Communications Manager
- A comma-separated-variable (CSV) file. CSV file names have the .csv extension.

Note

The CSV file can be on any shared network location to which Cisco Unified Attendant Console Standard has read and write access. However, if the file does not include a unique identifier (Primary Key) for each contact, it needs to be on the machine running Cisco Unified Attendant Console Standard.

Cisco Unified Communications Manager is the usual source of your corporate directory. Up to date contact information is copied from the source into Cisco Unified Attendant Console Standard by the synchronization process. For a description of this, see Directory Synchronization, page 5-3.

Directory Groups

You can also view and connect to contacts that are not in your synchronized directory but which you want to be able to select quickly. These directory groups can contain any combination of the following:

- Contacts imported (copied) from sources other than those listed above. These sources are either CSV files or Extensible Markup Language (XML) files. For more information, see Importing Contacts Into Directory Groups, page 5-12.
- Contacts you enter yourself. For more information, see Manually Adding Contacts To Directory Groups, page 5-13.

As well as importing contacts into directory groups, you can also export (copy) directory groups to CSV files, so that they can be used by other attendants or even in other applications.

Note

The format of CSV files imported/exported is different from that of CSV files used for synchronization.

You cannot amend contact records in the corporate directory. By contrast, directory groups are not updated by synchronization; and you can amend the contact details they contain.

For more information, see “Directory Groups” on page 5-10.
The relationships between directories and external information is summarized below.

**Legend**
2. Corporate directory.
3. Directory groups.
4. Cisco Unified Communications Manager.
5. CSV file for synchronization. For details of the format, see CSV File Formats, page B-2.
6. CSV file for importing and exporting. For details of the format, see CSV File Formats, page B-2.
7. XML file.
9. Import contacts.
10. Export contacts.
11. Manually entered contact.
Directory Synchronization

The process of copying contacts from your source directories into Cisco Unified Attendant Console Standard is known as synchronization, because the information in the source and internal directories is identical at the instant of copying. When synchronization occurs, the contacts from both the Cisco Unified Communications Manager and the CSV file (if you specify one) are copied into Cisco Unified Attendant Console Standard. The actual data that is displayed in your corporate directory depends not only on what is in your sources but also on any directory field mappings, directory filters or BLF rules you have configured.

If synchronization detects that a contact it is copying is already in Cisco Unified Attendant Console Standard, it first validates the information (checks that it is correct) and then updates Cisco Unified Attendant Console Standard with any information that has changed since the last synchronization. If a synchronization fails mid-process – for example, because of a network failure – it starts again from the beginning.

The synchronization process needs to know what contact data to copy from the source to your corporate directory, and it gets this information from directory field mappings; for more information, including how to set the mappings, see Directory Field Mappings, page 5-6.

You can choose to copy only certain contacts to Cisco Unified Attendant Console Standard by applying a directory filter, this ensures that only those contacts that have the characteristics you specify in a series of directory rules are added to the corporate directory. For example, you can synchronize the contacts from only a specific department. For more information, see Directory Filtering, page 5-5.

During synchronization you can modify the first part of your contact telephone numbers, so that the numbers in your corporate directory differ from those in your source directory. For example, you might have telephone number stored in Cisco Unified Communications Manager as 01189728567, but in the corporate directory you want to see it as 8567. You achieve this number conversion by creating BLF Rules, which are applied during synchronization. For more information, see BLF Rules, page 5-7.

The following:

- The converted numbers must match the DNs monitored in TAPI, otherwise the line state will not be displayed in the directories.
- These converted numbers are used by Cisco Unified Attendant Console Standard when it dials. If you set up BLF Rules, you also need to set up translations in Cisco Unified Communications Manager to convert the numbers in Cisco Unified Attendant Console Standard back to the originals, so that you can call those numbers.

Directory synchronization takes place at regular intervals that you define; and you can configure Cisco Unified Attendant Console Standard to synchronize with the source directory when you start it (this is actually the default situation). For more information, see Configuring Synchronization, page 5-4.
Synchronizing From a CSV Source File

When you synchronize from a CSV file, the file structure is first validated. For more information on valid CSV file formats, see CSV File Formats, page B-2. The first column of the CSV file must contain a unique identifier, known as a GUID, which identifies that contact as unique. If it does not, Cisco Unified Attendant Console Standard adds a first, GUID, column.

If your CSV file does not have a GUID column, and you intend storing it in a shared location that does not have write access, then before you put it there, you should place it locally and provide read-write access so that Cisco Unified Attendant Console Standard can add the GUID column.

Configuring Synchronization

Note
Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

When you install Cisco Unified Attendant Console Standard, a set of default synchronization parameters are created, which should work for your installation. However, you can change these parameters to the values you require.

To configure synchronization, do the following:

Step 1
In the main menu, choose File > Options.
The Options window appears.

Note
You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

Step 2
Click the Configuration tab.

Step 3
Under Sync Detail, do the following:

a. To synchronize when the application starts, select the Auto Synch Startup check box.

b. In Sync Interval (In Hours), type the interval in hours between automatic synchronizations. The default is zero.

Step 4
If you do not want to specify a different Cisco Unified Communications Manager, skip this step. Otherwise, under Call Manager Detail, edit the following as required:

• The Cisco Unified Communications Manager Server Address.
• The Cisco Unified Communications Manager Port number. By default, this is 443.
• The Cisco Unified Communications Manager Application Username. The application user must have the roles described in Assigning Roles to a User Group or Access Control Group, page 2-6.
• The Application Password that corresponds with the Username.

Step 5
If you do want to synchronize to a CSV file source, under CSV Detail, Browse to the File Location of your CSV source, and either type its name or select it, and then click OK.

If you specify a CSV file source, the application synchronizes to both it and any specified Cisco Unified Communications Manager when you restart the application.
If you do not have a CSV source, click **Clear** to clear this field.

To view a sample CSV file, click **View Sample**.

**Step 6**

Click **Apply**.

---

**Directory Filtering**

A directory filter consists of a series of *directory rules* that are applied during synchronization to ensure that only certain contacts are copied to the corporate directory.

Each directory rule can compare one of the following contact details to a text string:

- Department
- Telephone
- Location

The rule makes the comparison according to one of the following conditions:

- Begins with
- Contains
- Is exactly
- Ends with

So, for example, you might only want to copy contacts whose *Department Is exactly Sales*. This would, however, exclude anyone whose department is *Sales America*, for example. Or maybe you want to synchronize those contacts whose *Department Ends with ing*, which would copy the contacts from both Marketing and Engineering (and any other department ending in those letters).

Directory filters can consist of any number of directory rules, combined using these logical operators:

- **AND**
- **OR**

So, for example, you might have a rule that synchronizes only those contacts whose *Department Is exactly Sales AND their Location Ends with America*, so that your corporate directory contains all the new world sales staff. When you use more than two rules, the **AND** operator has precedence over **OR**; so a rule with the structure X **AND** Y **OR** Z is equivalent to (X **AND** Y) **OR** Z.

---

**Creating Directory Filters**

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**Note**

Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see **Preventing Access To Options Tabs**, page 4-2.

To create a directory filter, do the following:

**Step 1**

In the main menu, choose **File > Options**.

The **Options** window appears.
Note: You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

Step 2: Click the Directory Filters tab.

Step 3: Do the following, as many times as required until your filter is complete:
   a. If this is not the first rule in the filter, select the Link (Logical Operation) to apply between the previous rule and the one you are about to define.
   b. Select the contact Field to compare.
   c. Select the Condition to use in the comparison.
   d. In Value, type the text to compare with the Field.
   e. Click Add.

Step 4: Click Apply to save the changes.

Step 5: Restart the application to synchronize with your source. The filter is applied and only those contacts satisfying the filter are copied to the corporate directory.

Directory Field Mappings

Before you synchronize contacts into Cisco Unified Attendant Console Standard the application needs to know which contact data fields (source fields) to import from Cisco Unified Communications Manager or a CSV file, and what destination fields within the application to populate with the data. This is called defining the directory field mappings.

You can specify separate directory field mappings for the data from your Cisco Unified Communications Manager and from a CSV file; so, for example, you could import your sales contacts from Cisco Unified Communications Manager, and your marketing contacts from a CSV file.

When you install Cisco Unified Attendant Console Standard default directory field mappings are defined for you. You can, however, change these mappings or define your own. How to do these is described in Setting Directory Field Mappings, page 5-7.

Destination Fields

Cisco Unified Attendant Console Standard supports the following contact destination fields:

- Department
- Directory URI
- Email
- First Name
- Home Phone
- Last Name
- Location
- Manager
- Middle Name
Source Fields

By default, Cisco Unified Attendant Console Standard has mappings set up for synchronizing contacts from Cisco Unified Communications Manager (CUCM) and CSV files. However, you may wish to change the default mappings, or define your own.

Setting Directory Field Mappings

Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

To set the directory field mappings, do the following:

Step 1
In the main menu, choose File > Options.
The Options window appears.

Note
You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

Step 2
Click the Directory Mappings tab.
Step 3
Select a Directory Source: CUCM or CSV.
Step 4
Do the following, as required:
To add a mapping, select the Source Field, Destination Field, and then click Add.
To delete a mapping, click the corresponding Delete symbol, and then in the confirmation message, click Yes.
Step 5
Click Apply.
The next time you synchronize with your source, the mappings are applied.

BLF Rules

BLF rules are applied during synchronization to convert directory numbers to a different format by searching for and replacing specific number prefixes. You can define sets of multiple rules to be applied one after the other during synchronization, and you can define different sets of rules for synchronizing from Cisco Unified Communications Manager and CSV files.
BLF rules are applied in the order they are listed in the BLF Rules List. For example, if the first rule modifies the number from 0118957895 to 8957, the next rule is applied to the modified number. By moving rules up or down in the list, you change the order in which they are applied.

Adding BLF Rules

Note
Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

To add a BLF rule, do the following:

Step 1
In the main menu, choose File > Options. The Options window appears.

Note
You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

Step 2
Click the BLF Rules tab. A list of all existing BLF rules is displayed. By default, no rules are defined.

Step 3
Click New Rule. The BLF Rule Detail page appears.

Step 4
Type a Rule Name.

Step 5
In Begins With, type the digits to search for at the start of the number.

Step 6
In Length, type the number of digits in the original contact number.

Step 7
In Number of Digits to Remove, type the number of digits to remove from the start of the contact number.

Step 8
In Prefix, type the string of digits to replace the ones removed.

Step 9
If you want to remove non-digit characters (such as +) from the number, specify any not to remove by typing them (with no separators) in Ignorable Characters.

Step 10
To remove non-numeric characters from the number – except any you specified in Ignorable Characters – select the Remove Non-digit Characters check box.

Step 11
Select the Directory Source: CUCM or CSV.

Step 12
You can test your rule by doing the following under Test BLF Rule:
   a. In Enter a number to test the Rule, type a number, and then click Run Test.
   b. Check that the number displayed in Test Results matches your expectations. If not revise the rule settings.

Step 13
Click Apply.
Editing BLF Rules

Note: Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

To edit an existing BLF rule, do the following:

Step 1: In the main menu, choose File > Options.
The Options window appears.

Note: You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

Step 2: Click the BLF Rules tab.
A list of all existing BLF rules is displayed.

Step 3: Select the rule to edit.

Step 4: Click Edit Rule to display the BLF Rule Detail page.

Step 5: Edit the fields, as required. These are described in Adding BLF Rules.

Step 6: Test the rule, as required.

Step 7: Click Apply.

Deleting BLF Rules

Note: Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

To delete a BLF rule, do the following:

Step 1: In the main menu, choose File > Options.
The Options window appears.

Note: You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

Step 2: Click the BLF Rules tab.
A list of all existing BLF rules is displayed.

Step 3: Select the rule to delete.

Step 4: Click Delete Rule.
Reordering BLF Rules

Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

To change the order in which BLF rules are applied during synchronization, do the following:

Step 1  In the main menu, choose File > Options. The Options window appears.

Note  You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

Step 2  Click the BLF Rules tab. A list of all BLF existing rules is displayed.

Step 3  On each rule to move, do the following, as required:
   a.  Select the rule.
   b.  To move the rule towards the top of the list, click Move Up.
   c.  To move the rule towards the bottom of the list, click Move Down.

Step 4  Click Apply.

Directory Groups

Directory groups contains special contacts – including contacts not in your source directory – that you want to be able to select quickly. You must create your directory group before adding contacts to it. For details of how to do this, see Creating Directory Groups, page 5-10.

You add contacts to directory groups by either of the following methods:

- Importing contacts from CSV files or XML files, as described in Importing Contacts Into Directory Groups, page 5-12.
- Manually creating contacts, see Manually Adding Contacts To Directory Groups, page 5-13.

You can amend the name of a directory group, and the details of any contact in the group. You can also export the contacts from directory groups to CSV files.

Creating Directory Groups

You need to create directory groups before you can import data to them.
To create a directory group, do the following:

**Step 1**
Do one of the following:
- Click the **Add new directory group** (+) control.
- In the main menu, choose **Edit > Add directory group**.
- Use the keyboard shortcut you have defined, as described in Defining and Editing Keyboard Shortcuts, page 6-2.

The *New Directory Group* dialog box appears.

**Step 2**
Type a **Directory Group Name**, and then either click **Save** or press **Enter**.

The directory group is added as a new tab in the directory display.

---

### Deleting Directory Groups

**Note**
You cannot delete directory groups while synchronization is in process.

To delete a directory group, do one of the following:

**Step 1**
Right-click the directory group tab.

**Step 2**
Select **Delete Directory Group**.

**Step 3**
In the confirmation message, click **Yes**.

or

**Step 1**
Select the directory group, and then do one of the following:
- In the main menu, choose **Edit > Delete directory group**.
- Use the keyboard shortcut you have defined, as described in Defining and Editing Keyboard Shortcuts, page 6-2.

---

### Renaming Directory Groups

To rename a directory group, do the following:

**Step 1**
Right-click the directory group tab.

**Step 2**
Select **Edit Directory Group**.

**Step 3**
In the dialog box, type the new group name, and then click **Save**.
or

**Step 1**
Do one of the following:

- In the main menu, choose **Edit > Edit directory group**.
- Use the keyboard shortcut you have defined, as described in **Defining and Editing Keyboard Shortcuts, page 6-2**.

**Step 2**
In the dialog box, type the new group name, and then click **Save**.

---

## Importing Contacts Into Directory Groups

You can import contacts from the following types of file into an existing directory group.

- XML – for example, one previously exported from Cisco Attendant Console (CAC)
- CSV

For details of the formats of these files, see Appendix B, “Import/Export File Formats”.

---

**Note**
The following points:

- You cannot import contacts into a directory group while the application is synchronizing to the corporate directory.
- When you import from these types of file, no checks are made to see if the contact information duplicates that in any directory group, including the one that you are importing the data into.

At the start of the import process Cisco Unified Attendant Console Standard validates the file structure and format. If either is incorrect, you are alerted to the fact and the process is aborted.

You can only import contacts into an existing directory group – either one that already contains contacts, or a new one created especially for the purpose. See **Creating Directory Groups, page 5-10**.

To import contacts into a directory group, do one of the following:

**Step 1**
Do one of the following:

- In the main menu, choose **File > Import contacts**.
  
  or

  a. In the main menu, choose **File > Options**.
  
  b. In the **Options** window, click the **Import/Export** tab.

  or

  - Right-click in any directory group, and then select **Import Contacts**.

  or

  - Use the keyboard shortcut you have defined, as described in **Defining and Editing Keyboard Shortcuts, page 6-2**.
Step 2 Under **Import CSV/XML**, do the following:
- In **File Name**, click **Browse** and select the file to import.

**Note** You cannot type a file name or edit the name of a selected file.
- Select the **File Type**.
- If the **Directory Group** to receive the contacts is not correct, select the correct one.
- Click **Import Contacts**.

The import progress is displayed.

Step 3 When the import is complete, close the dialog box.

---

**Manually Adding Contacts To Directory Groups**

You can manually add contacts to directory groups.

**Note** You cannot manually add contacts to your corporate directory.

To add a contact to the displayed directory group, do the following:

Step 1 Do one of the following:
- Right-click the directory group contact listing, and then select **Add Contact**.
- Select the directory group and do either of the following:
  - In the main menu, choose **Edit > Contacts > Add contact**.
  - Use the keyboard shortcut you have defined, as described in Defining and Editing Keyboard Shortcuts, page 6-2.

The **Contact** dialog box appears.

Step 2 Type the contact information, which is described in **Destination Fields**, page 5-6. You can also enter a contact **Note**.

Step 3 Click **Save**.

Step 4 In the confirmation message, click **OK**.

Step 5 When you have finished adding contacts, close the **Contact** dialog box.

Alternatively, you can drag (copy) contacts from the corporate directory or another directory group, and then drop them into the target directory group.

**Note** This creates a duplicate contact in the directory group. Take care not to create multiple duplicates.

To drag contacts into a directory group:
Step 1 Display the directory containing the contact to copy.
Step 2 Select the contact and then, holding the mouse button, drag the contact over the appropriate directory group tab to list its contents.
Step 3 Drag the contact into the list, and then drop it.

Deleting Contacts From Directory Groups

You can delete contacts from directory groups.

Note You cannot delete contacts from your corporate directory.

To delete a contact from the displayed directory group, do the following:

Step 1 Select the contact to delete.
Step 2 Do one of the following:
  • Right-click and then select Delete Contact.
  • In the main menu, choose Edit > Contacts > Delete contact.
  • Use the keyboard shortcut you have defined, as described in Defining and Editing Keyboard Shortcuts, page 6-2.
Step 3 In the confirmation message, click Yes.

Editing Contacts In Directory Groups

You can edit the information belonging to a contact in a directory group.

Note You cannot edit contacts that have been synchronized into the corporate directory.

To edit a contact in a directory group, do the following:

Step 1 Open the relevant group and display the contact.
Step 2 Do one of the following:
  • Right-click the contact, and then select Edit Contact.
  • In the main menu, choose Edit > Contacts > Edit contact.
  • Use the keyboard shortcut you have defined, as described in Defining and Editing Keyboard Shortcuts, page 6-2.

The Contact dialog box appears.
Step 3 Edit the contact information, which is described in Destination Fields, page 5-6.
Exporting Contacts From Directory Groups

You can export a directory group into a preexisting CSV file.

To export a directory group, do the following:

**Step 1**

Do one of the following:

- In the main menu, choose **File > Export contacts**.
  - or

  a. In the main menu, choose **File > Options**.
  
  b. In the **Options** window, click the **Import/Export** tab.
     - or
  
  c. Right-click in any directory group, and then select **Export Contacts**.
     - or
  
  d. Use the keyboard shortcut you have defined, as described in [Defining and Editing Keyboard Shortcuts, page 6-2](#).

**Step 2**

Under **Export CSV** do the following:

- a. In **File Name**, click **Browse** and navigate to the target folder.

- b. Either type a file name (to create a new CSV file) or select an existing file to export to. If you select an existing file you are prompted to overwrite it; click **Yes** to overwrite the file.

- c. Select the **Directory Group** to export.

- d. Click **Export Contacts**.

  The export progress is displayed.
Viewing and Using Directories

The bottom part of the interface consists of the directories and their associated controls. For example:

Legend
1. Search – type details of the contact to search for.
2. Search Preferences – define which contact information to search.
3. Directory tabs – select the directory to display. Includes both corporate directory and directory groups.
4. Create a new directory group.
5. Column headings – identify the data and enable you to change the column order and the contact sort order. These are described below.
6. (Visible only when viewing a directory group) Add contacts to the group.
7. Phone state – the state of the contact’s phone, such as Ringing, On hook, and Do not disturb.
8. Presence state – this mimics a Jabber or CUPC client, where a symbol indicates the real-time status of the contact, such as Available, Do not disturb, and Away. All other contacts have their subscriptions opened only when displayed in the Directory pane.

The following columns of information are displayed for each contact:
• Last Name – the contact’s last name.
• First Name – the contact’s first name.
• Telephone – the contact’s telephone number.
• Department – the contact’s department.
• Notes – about the contact.

If the contact was imported or manually entered into Cisco Unified Attendant Console Standard you can edit this information.

Changing the Directory View

You can change the order of the columns by using your mouse to select a column heading and then dragging it to another place in the table.
When the data is first displayed it appears in its default order, as copied from the Call Manager. You can change the alphanumeric sort order of the table rows by clicking any column heading – the table will be sorted according to the data in that column. The small arrowhead at the top of the cell shows the direction in which the column is sorted: an up-arrow for ascending (normal alphanumeric) order, a down-arrow for descending (reverse) order, and no arrow for default order. Repeatedly clicking the column heading toggles you through these sort modes.

**Searching For Contacts**

You can search for contacts in any open directory (the corporate directory and any directory groups you are displaying). Details of matching contacts are shown under the **Search Results** directory tab.

You can search any of the following contact detail fields:

- First Name
- Last Name
- Directory Number
- Department

You can disable the ability to search any of these fields by setting the Search Preferences. These are described in **Search Preferences, page 5-17**.

You do not need to specify which field you want to search: the string you type in the Search field is matched against all of them. So, for example, if you have a Sales department, and a staff member with the last name Saunders, searching for the characters Sa, will display all the matching last names (and first names) and list everyone in Sales.

Searching begins as soon as you start typing; and the more characters you type, the fewer contacts will match. When the contact you require is displayed, select it and then use the controls interface to communicate with that contact.

**Search Preferences**

The Search Preferences enable you control what fields are searched and what contacts are displayed.

You can restrict which contact detail fields are searched using the **Searchable Fields**. De-select (clear) any you do not want to search:

- First Name
- Last Name
- Telephone
- Department

You can also limit which contacts are displayed in the search results using these **Filters**:

- **Has Telephone** – Display only those contacts with a directory number (DN) assigned. All other contacts are filtered out (excluded) from the search results.
- **Has Emails** – Display only those contacts with an email address assigned. All other contacts are filtered out (excluded) from the search results.

**Setting Search Preferences**

To set the search preferences, do the following:
Step 1  Click **Search Preferences**.
Step 2  In the **Search Preferences** dialog box, select the required check boxes.
Step 3  Click **Save**.
Step 4  In the confirmation message, click **OK**.

### Viewing Contact Information

The directory display contains basic information about each contact. You can view more information about a selected contact by viewing their contact details. How you view contact details depends on whether the contact is in the corporate directory or a directory group.

To view a contact's details, do the following:

---

Step 1  Display the directory containing the contact.
Step 2  Right-click the contact.
Step 3  Do one of the following, as appropriate:
   - If the contact is in the corporate directory, click **View**.
   - If the contact is in a directory group, click **Edit Contact**.

The **Contact** dialog box is displayed.

If you are viewing the details of a contact in a directory group, you can also edit the details, as described in **Editing Contacts In Directory Groups**, page 5-14.

Step 4  When you have finished viewing the information, click **Cancel**.

### Contact Notes

You can add notes to any contact record in the main directory, the search results, or any directory group. The notes are text containing additional information about the contact. Notes are stored in the database and are available whenever you sign in. If you delete a contact - for example by applying BLF rules - any contact notes are also deleted. If you export a contact, their notes are also exported, and if you import a contact with notes, they are visible in the application.

### Adding Contact Notes

To add contact notes:

---

Step 1  Select the contact to add notes to.
Step 2  Either:
   - Right-click the contact, and then choose **Contact Notes**.
   - Choose **Edit > Contacts > Contact Notes**.
Contact Notes

The Contact Notes dialog box appears.

**Step 3**
In the text box, type the notes and then either click **Save** or tab to the control and press **Enter** to add the notes to the contact.

**Note**
You must enter some text for you to be able to save it.

The notes appear in the contact’s **Notes** column.

---

**Editing Contact Notes**

You can edit existing contact notes. To do so, follow the **Adding Contact Notes** procedure, but edit the existing notes.

**Deleting Contact Notes**

To delete existing contact notes:

**Step 1**
Select a contact with notes to delete.

**Step 2**
Either:
- Right-click the contact, and then choose **Delete Notes**.
- Choose **Edit > Contacts > Delete Notes**.

**Note**
These menu options are disabled if there are no notes to delete.

**Step 3**
The notes are deleted from the contact **Notes** column.
Keyboard Shortcuts

Keyboard shortcuts enable you to quickly do things in the interface without needing to use the mouse or menus.

The application comes configured with the following keyboard shortcuts.

<table>
<thead>
<tr>
<th>Action</th>
<th>Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dial</td>
<td>Ctrl+D</td>
</tr>
<tr>
<td>Answer</td>
<td>Ctrl+A</td>
</tr>
<tr>
<td>End Call</td>
<td>Ctrl+H</td>
</tr>
<tr>
<td>Hold Call</td>
<td>Ctrl+L</td>
</tr>
<tr>
<td>Transfer Call (Blind transfer)</td>
<td>Ctrl+X</td>
</tr>
<tr>
<td>Consult Transfer (speak to destination before transfer)</td>
<td>Ctrl+T</td>
</tr>
<tr>
<td>Direct Transfer</td>
<td>Ctrl+R</td>
</tr>
<tr>
<td>Join Call</td>
<td>Ctrl+J</td>
</tr>
<tr>
<td>Park Call</td>
<td>Ctrl+P</td>
</tr>
<tr>
<td>Start Conference</td>
<td>Ctrl+N</td>
</tr>
<tr>
<td>Access Voicemail</td>
<td>Ctrl+O</td>
</tr>
<tr>
<td>Sign out of application</td>
<td>Ctrl+S</td>
</tr>
<tr>
<td>Log out of hunt groups</td>
<td>Ctrl+I</td>
</tr>
<tr>
<td>Open Help</td>
<td>F1</td>
</tr>
</tbody>
</table>

In addition, you can define shortcuts for the following actions:

- Resume Call
- Retrieve Parked Call
- Email
- Options
- Import contacts
- Export contacts
- Exit
- Keyboard Shortcut Options
Defining and Editing Keyboard Shortcuts

To define or edit a keyboard shortcut, do the following:

---

**Step 1**
Do either of the following:
- In the main menu, choose **Edit > Keyboard Shortcuts**.

or
- a. In the main menu, choose **File > Options**.
- b. The **Options** window appears.
- c. Click the **Keyboard Shortcuts** tab.

**Step 2**
Select the Action to define. This can be an action that already has a shortcut.

**Step 3**
Click **Set Shortcut**.

**Step 4**
Type the shortcut you require. For example, to set an action to Ctrl+Y, simply type **Ctrl+Y** (press and hold the **Ctrl** key and then press the **Y** key).

**Step 5**
Click **Apply**.

---

You cannot use the same keyboard shortcut for more than one action.
Removing Keyboard Shortcuts

To remove a keyboard shortcut, do the following:

| Step 1 | Access the Keyboard Shortcuts page, as described in Defining and Editing Keyboard Shortcuts, page 6-2. |
| Step 2 | Select the action from which to remove the keyboard shortcut. |
| Step 3 | Click Clear Shortcut. |
| Step 4 | Click Apply. |

Resetting Shortcuts to their Default Values

To reset keyboard shortcuts to their default values, do the following:

| Step 1 | Access the Keyboard Shortcuts page, as described in Defining and Editing Keyboard Shortcuts, page 6-2. |
| Step 2 | Do one of the following, as appropriate: |
| To reset all keyboard shortcuts to their default values, click Reset All Shortcuts to Default. |
| To reset a single keyboard shortcut to its default value: |
| a. | Select the action to reset. |
| b. | Click Reset Shortcut. |
| Step 3 | Click Apply. |
Chapter 6  Keyboard Shortcuts

Resetting Shortcuts to their Default Values
Configuring Logging

Access to the functions described in this section may be restricted by your system administrator, and you may need a password to access the necessary Options tab. For more information, see Preventing Access To Options Tabs, page 4-2.

Cisco Unified Attendant Console Standard can keep a log of all event that occur within the application. This information can be used to gauge the application’s configuration and performance, and to help troubleshoot any errors. You can control which application subsystems are monitored, which events are logged, and the size and number of the log files.

To configure logging, do the following:

**Step 1**
In the main menu, choose **File > Options**.

The **Options** window appears.

**Note**
You can configure a keyboard shortcut to do this. For instructions, see Chapter 6, “Keyboard Shortcuts”.

**Step 2**
Click the **Logging** tab.

**Step 3**
Set the following, as required:

- Type the **Max Size RollBackups**, which is the maximum number of log files to store before you re-use (overwrite) the first one. This works in conjunction with **Maximum File Size (In MBs)**.
- Type the **Maximum File Size (In MBs)**. When the file gets this size it is closed and a new log file is opened. Works in conjunction with Max Size RollBackups.
- Select the **Logging Level**. This is the default amount of detail that will be written into the log file. Detail decreases in the following order:
  - DEBUG
  - INFO
  - WARN
  - ERROR
  - FATAL

The level you set is applied to all the modules grouped below.

- Under **Modules Setting**, set the logging level for each module to override the default value.
Step 4  Click **Apply**.
Import/Export File Formats

Cisco Unified Attendant Console Standard can handle contact directory files in the following formats:

- XML File Format, page B-1
- CSV File Formats, page B-2

It can also import login devices from CSV files, with the format described in CSV Files for Importing Sign In Devices, page B-3.

XML File Format

XML files that you import into Cisco Unified Attendant Console Standard must have the following format:

```xml
<SpeedDialUsers>
  <G n="Sample Group">
    <E>
      <N>Jim Kathirine</N>
      <T>25421</T>
      <M>Jim@cisco.com</M>
      <D>Jim@cisco.com</D>
      <O>This is a sample entry</O>
      <P>00443454332</P>
      <H>0044556634</H>
      <S>Reading</S>
      <A>IT</A>
      <R>Jason Rumsey</R>
      <U>Software Engineer</U>
      <V>Management</V>
    </E>
  </G>
</SpeedDialUsers>
```

Tags

- `<SpeedDialUsers>` = the file contains XML data for import into Cisco Unified Attendant Console Standard.
- `<G>` = Directory group name
- `<E>` = Individual contact
- `<N>` = Name
- `<T>` = Telephone number
- `<M>` = Email address
 CSV File Formats

Cisco Unified Attendant Console Standard handles two types of comma-separated value (CSV) files:

- CSV Files for Synchronization
- CSV Files for Directory Import and Export

These files differ in the number of data fields they contain in each contact record.

All CSV files used by Cisco Unified Attendant Console Standard must have the following format:

- Each contact is on a single line.
- Empty comma-separated values are valid.
- Lines starting with # or ; are comments and are ignored. Empty and blank lines are also ignored.

CSV Files for Synchronization

In a CSV file for synchronization, the data for each contact must be in the following order:

Last Name, First Name, Telephone Number, Department, User Field 1, User Field 2, Site, Building, Directory URI.

For example:

```markdown
#     * Copyright (c) 2014 by Cisco Inc.
#     * All rights reserved.
#
# Here is a sample corporate directory file. It should contain comma separated entries, one line per user in the directory
# The values should in the following format:
#
# Last Name, First Name, Telephone number, Department, User Field 1, User Field 2, Site, Building, Directory URI
#
# Empty values are legal (no department etc.)
#
# Lines starting with '#' or ';' are treated as comments and ignored. Empty or blank lines are ignored as well

Kathirine, Jim, 25421, Marketing, ...., Jim@cisco.com
Martha, Bryan, 87952, Support, ...., martha@cisco.com
Luce, Richard, 2548, Marketing, ...., luce@cisco.com
Meriall, Thomas, 8763, Marketing, ...., meriall@cisco.com
```
Appendix B
Import/Export File Formats

CSV File Formats

CSV Files for Directory Import and Export

In a CSV file for directory import or export, the data for each contact must be in the following order:

Last Name, First Name, Telephone Number, Note, Group Name, Email, Directory URI, Middle Name, Mobile, Home Phone, Site, Department, Manager, User Field 1, User Field 2.

For example:

```
Harye,Walter,5563,Marketing,,,,,harye@cisco.com
```

CSV Files for Importing Sign In Devices

You can import devices that operators use to log into Cisco Unified Attendant Console Standard, as described in Importing Sign In Devices, page 4-7.

These CSV files have the data for each device in the following format:

```
Device name, Extension, Line number
```

For example:

```
#     * Copyright (c) 2014 by Cisco Inc.
#     * All rights reserved.
#     Here is a sample device list file. It should contain
# comma separated entries, one line per device in the device list
# The values should in the following format:
#
# DeviceName,Extension,LineNumber
#
# Empty values are legal (no DeviceName etc.)
# Lines starting with '#' or ';' are treated as comments
# and ignored. Empty or blank lines are ignored as well

Kathirine,Jim,25421,This is a sample entry,Sample Group 1,Jim@cisco.com,Jim@cisco.com,Maid,
00443454332,0044556634,Reading,IT,Martin Taylor,Support Engineer,Senior
Martha,Bryan,87992,This is a sample entry,Sample Group 1,martha@cisco.com,martha@cisco.com,Aryan,
00443454335,0044556635,Reading,IT,Martin Taylor,Support Engineer,Junior
Luce,Richard,2548,This is a sample entry,Sample Group 2,luce@cisco.com,luce@cisco.com,Tace,
00443454339,0044556636,Reading,R&D,Jason Rumsey,Software Engineer,Management
Meriall,Thomas,8763,This is a sample entry,Sample Group 2,meriall@cisco.com,meriall@cisco.com,Kate,
00443454331,0044556637,Reading,R&D,Jason Rumsey,Software Engineer,Junior
Harye,Walter,5563,This is a sample entry,Sample Group 2,harye@cisco.com,harye@cisco.com,Heather,
00443454333,0044556638,Reading,R&D,Jason Rumsey,Software Engineer,Senior
```
CSV File Formats

# and ignored. Empty or blank lines are ignored as well

SEP2893FE130280,5868,1
SEP2893FEA2D22A,5873,1
SEP000C299DA714,5870,1
SEP88AE1DB0F66C,5869,1
SEP00141C48DDD9,5859,1
SEP00141C48DDD9,5870,2

Note

Any devices in the file that lack one or more of the fields Device name, Extension, or Line number are considered non-Cisco devices and will not be imported.
# Phones Supported by Cisco Unified Attendant Console Standard

Cisco Unified Attendant Console Standard supports the following phones:

<table>
<thead>
<tr>
<th>Phone Type</th>
<th>Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td>3905</td>
<td>Not as Console and cannot support BLF, but can transfer.</td>
</tr>
<tr>
<td>3911</td>
<td></td>
</tr>
<tr>
<td>3951</td>
<td></td>
</tr>
<tr>
<td>6901</td>
<td>Not tested</td>
</tr>
<tr>
<td>6911</td>
<td>Yes</td>
</tr>
<tr>
<td>6921</td>
<td>Yes</td>
</tr>
<tr>
<td>6941</td>
<td>Yes</td>
</tr>
<tr>
<td>6945</td>
<td>Yes</td>
</tr>
<tr>
<td>6961</td>
<td>Yes</td>
</tr>
<tr>
<td>7821</td>
<td>Yes</td>
</tr>
<tr>
<td>7841</td>
<td>Yes</td>
</tr>
<tr>
<td>7861</td>
<td>Yes</td>
</tr>
<tr>
<td>7902</td>
<td>Not tested (Obsolete)</td>
</tr>
<tr>
<td>7905</td>
<td>Yes</td>
</tr>
<tr>
<td>7906</td>
<td>Yes</td>
</tr>
<tr>
<td>7910</td>
<td>Yes</td>
</tr>
<tr>
<td>7911</td>
<td>Yes</td>
</tr>
<tr>
<td>7912</td>
<td>Yes</td>
</tr>
<tr>
<td>7920</td>
<td>Yes</td>
</tr>
<tr>
<td>7921</td>
<td>Yes</td>
</tr>
<tr>
<td>7925</td>
<td>Yes</td>
</tr>
<tr>
<td>7925G</td>
<td>Yes</td>
</tr>
<tr>
<td>7925G-EX</td>
<td>Yes</td>
</tr>
<tr>
<td>7926</td>
<td>Yes</td>
</tr>
<tr>
<td>7931</td>
<td>Yes</td>
</tr>
<tr>
<td>Phone Type</td>
<td>Supported</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------</td>
</tr>
<tr>
<td>7940</td>
<td>Yes</td>
</tr>
<tr>
<td>7941</td>
<td>Yes</td>
</tr>
<tr>
<td>7941G-GE</td>
<td>Yes</td>
</tr>
<tr>
<td>7942</td>
<td>Yes</td>
</tr>
<tr>
<td>7942-G</td>
<td>Yes</td>
</tr>
<tr>
<td>7945</td>
<td>Yes</td>
</tr>
<tr>
<td>7945G</td>
<td>Yes</td>
</tr>
<tr>
<td>7960</td>
<td>Yes</td>
</tr>
<tr>
<td>7961</td>
<td>Yes</td>
</tr>
<tr>
<td>7961G-GE</td>
<td>Yes ‡</td>
</tr>
<tr>
<td>7962</td>
<td>Yes</td>
</tr>
<tr>
<td>7965</td>
<td>Yes</td>
</tr>
<tr>
<td>7965G</td>
<td>Yes</td>
</tr>
<tr>
<td>7970</td>
<td>Yes</td>
</tr>
<tr>
<td>7971</td>
<td>Yes</td>
</tr>
<tr>
<td>7975</td>
<td>Yes ‡</td>
</tr>
<tr>
<td>8941</td>
<td>Yes</td>
</tr>
<tr>
<td>8945</td>
<td>Yes</td>
</tr>
<tr>
<td>8961</td>
<td>Yes</td>
</tr>
<tr>
<td>9951</td>
<td>Yes</td>
</tr>
<tr>
<td>9971</td>
<td>Yes</td>
</tr>
<tr>
<td>Cisco CSF</td>
<td>Yes</td>
</tr>
<tr>
<td>DX650</td>
<td>Yes</td>
</tr>
<tr>
<td>IP Communicator</td>
<td>Yes</td>
</tr>
<tr>
<td>Jabber</td>
<td>Yes - standard Jabber installations (locally installed on the operator computer) and VXME installations (installed in a VXME environment) are supported as operator devices and end points.</td>
</tr>
</tbody>
</table>

‡ If **Log in to hunt groups at sign in** is selected, the Cisco Unified Call Manager resets this phone type when the user logs in to the Cisco Unified Attendant Console Standard client.
INDEX

A

Access Control Group
assigning roles to 2-6
creating 2-6
accessibility for users with disabilities 1-2
active call information 1-3
alerts, configuring 4-5
Application User
assigning devices to, for directory BLF 2-7
creating and assigning 2-7

B

BLF rules 5-3, 5-7 to 5-10
adding 5-8
deleting 5-9
editing 5-9
reordering 5-10

C

Call Control pane 1-3
Call History pane 1-3
Cisco TAPI wave driver, installing 2-11
Cisco TSP for Cisco Unified Communications Manager 7.x, installing and configuring 2-10 to 2-12
Cisco Unified Attendant Console Standard
features 1-1
installing 2-8
licensing 2-12 to 2-17
Cisco Unified Communications Manager
compatibility 2-4
configuring 2-5 to 2-8
connecting to a different 4-4
Citrix support 2-2
computer requirements 2-1
contact information
editing 5-14
viewing 5-18
contact notes 5-18
contacts
adding 5-13
searching 5-17
corporate directory 5-1
CSV file 5-1
formats B-2
for synchronization B-2
CUCM, See Cisco Unified Communications Manager

d
device list 4-6
directories 5-1 to 5-19
viewing and using 5-16
directory
change view 5-16
destination fields 5-6
group 5-1
search preferences 5-17
source fields 5-7
sources 5-1
synchronization 5-3 to 5-5
directory field mappings 5-3, 5-6
setting 5-7
directory filters 5-3, 5-5
creating 5-5
directory groups 5-10 to 5-15
  adding contacts manually 5-13
  creating 5-10
  deleting 5-11
  deleting contacts 5-14
  editing contacts 5-14
  exporting contacts 5-15
  importing contacts 5-12
  renaming 5-11
Directory pane 1-3
directory tabs 5-16

E
End User account for Presence 2-8
evaluation software, licensing 2-13
exiting Cisco Unified Attendant Console Standard 3-3
export contacts 5-1
exporting contacts 5-15

F
features of Cisco Unified Attendant Console Standard 1-1
file formats when importing data B-1
filtering directories 5-5
firewall exceptions 2-2

H
hardware requirements 2-1
Help, accessing 1-3
hunt group login 3-1, 3-3

I
import/export file formats B-1 to B-4
importing contacts 5-1, 5-12
installing Cisco Unified Attendant Console Standard 2-1 to 2-17
interface, description 1-2
introduction to Cisco Unified Attendant Console Standard 1-1 to 1-4

J
Jabber support 2-2

K
keyboard shortcuts 6-1 to 6-3
  defining and editing 6-2
  removing 6-3
  resetting to default values 6-3

L
licensing 2-12
  bulk licenses 2-15
  CUAC Department Edition upgrades 2-14
  evaluation software 2-13
  purchased software 2-15
  resetting license codes 2-16
logging, configuring A-1 to A-2

M
main menu 1-3

N
network requirements 2-2

O
operating system support 2-2
operator
details, setting 4-3
voicemail prefix, setting 4-5
Options Password 4-2

P

pane
Call Control 1-3
Call History 1-3
Directory 1-3
Parked Calls 1-3
Parked Calls pane 1-3
phones supported C-5 to C-6
phone state, directory display 5-16
Presence Server, connecting to a different 4-3
presence state, directory display 5-16
purchased software, licensing 2-15

R

requirements, hardware and software 2-1

S

searching for contacts 5-17
search preferences 5-17
sign in devices 4-7
software
relicensing 2-17
requirements 2-1
starting Cisco Unified Attendant Console Standard 3-1 to 3-3, 4-1 to 4-8
synchronization 5-1, 5-3
configuring 5-4
from CSV Source File 5-4

T

TAPI Service Provider, See TSP

TSP for CUCM 7.x
configuring 2-11
downloading and installing 2-10
TSP installation 2-9

U

User Group
assigning roles to 2-6
creating 2-5
user interface, description 1-2

W

Windows folder permissions 2-3

X

XML file format B-1