



## **User Guide for the Cisco Unity Connection Personal Call Transfer Rules Web Tool (Release 9.x)**

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# CHAPTER 1

## The Personal Call Transfer Rules Web Tool

- [About the Personal Call Transfer Rules Web Tool, page 1](#)
- [Accessing the Personal Call Transfer Rules Web Tool, page 2](#)
- [Accessing Help for the Personal Call Transfer Rules Web Tool, page 2](#)

### About the Personal Call Transfer Rules Web Tool

Cisco Unity Connection can transfer and screen your incoming calls according to rules you set up in the Personal Call Transfer Rules web tool.

Connection uses a personal call transfer rule to transfer particular calls to you according to caller identity, time of day, and your meeting schedule, or to transfer calls to voicemail or to another phone number. You can set rules to transfer calls to a phone number, a series of phone numbers, or to an email-based paging address, or to send SMS messages to an SMS device. Additionally, you can set up rules to screen some or all of your incoming calls.

You can build very simple personal call transfer rules—for example, to transfer a call from a single phone number to voicemail—or create more complex rules by using the following components:

<b>Contacts list</b>	Connection uses your contacts list to route incoming calls, as well as to place outgoing calls when you are using voice commands. (You manage your contacts list in the Messaging Assistant web tool.)
<b>Caller groups</b>	You can organize callers into groups in order to apply one rule to multiple callers without having to recreate the rule multiple times. Caller groups can contain other Connection users, contacts from your contacts list, and administrator-defined contacts.
<b>Personal destinations</b>	You can create a directory of contact phone numbers to which Connection can route incoming calls. (These destinations are in addition to notification devices.)
<b>Destination groups</b>	You can organize personal destinations and notification devices into groups so that Connection routes calls to each destination in the order listed until the phone is answered, the caller hangs up, or the last destination in the group is reached. You can specify the order of destinations in the group and the length of time that Connection waits for the phone to be picked up at each destination.

Once rules have been set up, you can enable them by phone or in the Personal Call Transfer Rules web tool.

**Related Topics**

[Accessing Help for the Personal Call Transfer Rules Web Tool, on page 2](#)

## Accessing the Personal Call Transfer Rules Web Tool

**Procedure**

- 
- Step 1** Go to the Cisco PCA sign-in page at **http://<Cisco Unity Connection server>/ciscopca**. The URL is case sensitive.  
(Bookmark the Cisco PCA URL, so you do not have to enter the web address each time you want to access the Personal Call Transfer Rules web tool.)
- Step 2** Enter your username and password.  
If you cannot remember your Cisco PCA password, contact your Connection administrator for assistance.
- Step 3** Select **Sign In**.
- Step 4** On the Cisco PCA home page, select the **Personal Call Transfer Rules** link.
- Step 5** When you are finished, select **Sign Out** in the top right corner of any Personal Call Transfer Rules page.
- 

## Accessing Help for the Personal Call Transfer Rules Web Tool

**Procedure**

- 
- Step 1** On any Personal Call Transfer Rules page, select the **Help** menu.
- Step 2** From the Help menu, select the applicable link:

Option	Description
Content	Provides a list of topics in Help.
Index	Provides a Help index.
This Page	Provides the Help topic applicable to the page you are viewing.

For help on an icon, hover the cursor over the icon until the tooltip displays.

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## CHAPTER 2

# Managing Caller Groups

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- [About Caller Groups, page 3](#)
- [Creating Caller Groups, page 4](#)
- [Adding Callers to Caller Groups, page 4](#)
- [Deleting Callers from Caller Groups, page 5](#)
- [Changing the Names of Caller Groups, page 5](#)
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## About Caller Groups

By creating a caller group, you can apply one rule to multiple callers without having to recreate the rule several times. Caller groups contain multiple entries from your contacts list and the Cisco Unity Connection directory.

Using groups can help you organize callers in a number of ways. For example, you could create a caller group of your top-priority clients and co-workers. To ensure that these callers can reach you when you are in meetings, you would create a rule set with one rule that transfers calls from anyone in the group to your mobile phone during your meeting times and a second rule that transfers other calls to voicemail.

The following types of callers can be members of caller groups:

<b>Contacts</b>	Callers who are entered in your contacts list.
<b>Administrator-defined contacts</b>	Callers who are in the Connection directory but who are not enabled to use Connection features and do not have a voice mailbox.
<b>Connection users</b>	Callers who are in the Connection directory, have a voice mailbox, and are enabled to use Connection features.



### Note

When a caller group contains a caller who is listed in the Cisco Unity Connection directory and the caller is later removed from the system by your Connection administrator, the caller will also be removed from your caller group.

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**Related Topics**

[Creating Caller Groups, on page 4](#)

# Creating Caller Groups

**Procedure**

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, select **View Caller Groups**.
  - Step 2** On the Caller Groups page, select the **New Caller Group** icon below the menu bar.
  - Step 3** On the Caller Group page, enter a name for the caller group, and select **Save**.
  - Step 4** Select **Add Members**.
  - Step 5** On the Find Contacts page, select the applicable tab, depending on whether you want to search the list of users in the Connection directory or in your contacts list.  
You may be able to search for both users and administrator-defined contacts in the Connection directory. Administrator-defined contacts are indicated by an asterisk (\*) next to the name in the search results list.
  - Step 6** Fill in the fields, as applicable to your search, and select **Find**.
  - Step 7** Check the check box next to the name to add the contact or user to the caller group.
  - Step 8** Select **Add Users** or **Add Contacts**, as applicable. Connection adds the contact to the caller group and returns to the Caller Group page.
  - Step 9** Repeat Step 4 through Step 8 to add any additional users or contacts.
  - Step 10** On the Caller Group page, select **Save**.
- 

**Related Topics**

[About Caller Groups, on page 3](#)

# Adding Callers to Caller Groups

You can add members to a caller group at any time.

**Procedure**

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, select **View Caller Groups**.
- Step 2** On the Caller Groups page, select the caller group name.
- Step 3** On the Caller Group page, select **Add Members**.
- Step 4** On the Find Contacts page, select the applicable tab, depending on whether you want to search the list of users in the Connection directory or your contacts list.  
You may be able to search for both users and administrator-defined contacts in the Connection directory. Administrator-defined contacts are indicated by an asterisk (\*) next to the name in the search results list.



- Step 5** Fill in the fields, as applicable to your search, and select **Find**.
  - Step 6** Check the check box next to the name to add the contact or user to the caller group.
  - Step 7** Select **Add Users** or **Add Contacts**, as applicable. Connection adds the contact or user to the caller group and returns to the Caller Group page.
  - Step 8** On the Caller Group page, select **Save**.
- 

## Deleting Callers from Caller Groups

You can remove members of a caller group at any time.

### Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, select **View Caller Groups**.
  - Step 2** On the Caller Groups page, select the caller group name.
  - Step 3** On the Caller Group page, check the check box next to the name of the caller you want to delete. You can check multiple check boxes to delete more than one caller at a time.
  - Step 4** Select **Delete Selected**.
- 

### Related Topics

[Deleting Caller Groups, on page 5](#)

## Changing the Names of Caller Groups

### Procedure

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- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, select **View Caller Groups**.
  - Step 2** On the Caller Groups page, select the caller group name.
  - Step 3** On the Caller Group page, change the name of the group in the Name field.
  - Step 4** Select **Save**.
- 

## Deleting Caller Groups

You cannot delete a caller group if it is used by a rule. Delete the caller group from the rule first, then delete the caller group.

## Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Caller Groups menu, select **View Caller Groups**.
- Step 2** On the Caller Groups page, check the check box next to the group that you want to delete. You can check multiple check boxes to delete more than one group at a time.
- Step 3** Select the **Delete Selected Rows** icon below the menu bar.
- 

## Related Topics

- [Deleting Callers from Caller Groups, on page 5](#)
- [Changing Rules, on page 20](#)



## CHAPTER 3

# Managing Destinations and Destination Groups

- [About Destinations, page 7](#)
- [Creating Personal Destinations, page 8](#)
- [Changing Personal Destinations, page 9](#)
- [Deleting Personal Destinations, page 9](#)
- [Changing the Rings-to-Wait Setting for Phone Destinations, page 9](#)
- [Changing the Loop-Detection Setting for Destinations, page 10](#)
- [About Destination Groups, page 10](#)
- [Creating Destination Groups, page 11](#)
- [Changing Destination Groups, page 12](#)
- [Deleting Destinations from Destination Groups, page 12](#)
- [Deleting Destination Groups, page 12](#)

## About Destinations

Destinations are phone numbers or email addresses to which Cisco Unity Connection can transfer your incoming calls or send text messages as a part of personal call transfer rules. There are three types of destinations:

<b>Phone</b>	<p>Phone destinations are phone numbers to which Connection can transfer incoming calls.</p> <p>Phone numbers associated with you in the Connection directory can be used as phone destinations. These might include your primary extension, voicemail access number, and company mobile phone number. Phone numbers in the directory are maintained by your Connection administrator.</p> <p>You can also create personal phone destinations, such as your personal mobile phone number, your home phone number (if it is not listed in the Connection directory), and phone numbers at which you can be reached during a business trip. You manage these destinations in the Personal Call Transfer Rules web tool.</p>
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<b>SMS</b>	<p>SMS destinations are phone numbers for SMS devices to which Connection can send a text message. The message uses the standard format “You have a call from &lt;number or extension&gt; at &lt;time&gt; on &lt;date&gt;.” (For example, “You have a call from 3233 at 15:16 on 04 October 2010.”)</p> <p>Note that for an SMS destination to be used in a rule, it must be added to a destination group that contains at least one phone destination. (SMS destinations do not appear in the Destination list on the Rule page when you are creating a rule.)</p> <p>SMS devices may be added for you by your Connection administrator, and you may be able to modify them in the Messaging Assistant web tool. SMS devices do not need to be enabled in the Messaging Assistant to be available as a destination in the Personal Call Transfer Rules web tool.</p>
<b>SMTP</b>	<p>SMTP destinations are email addresses to which Connection can send a text message. The message uses the standard format “You have a call from &lt;number or extension&gt; at &lt;time&gt; on &lt;date&gt;.” (For example, “You have a call from 3233 at 15:16 on 04 October 2010.”)</p> <p>Note that for an SMTP destination to be used in a rule, it must be added to a destination group that contains at least one phone destination. (SMTP destinations do not appear in the Destination list on the Rule page when you are creating a rule.)</p> <p>SMTP devices may be created for you by your Connection administrator, and you may be able to modify them in the Messaging Assistant web tool. SMTP devices do not need to be enabled in the Messaging Assistant to be available as a destination in the Personal Call Transfer Rules web tool.</p>

**Related Topics**

[Creating Personal Destinations, on page 8](#)

## Creating Personal Destinations

**Procedure**

- 
- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destinations**.
- Step 2** On the Destinations page, select the **New Destination** icon below the menu bar.
- Step 3** On the Create Destination page, in the Name field, enter a name for the destination.
- Step 4** In the Phone Number field, enter a phone number for the destination.  
Use digits 0 through 9. Do not use spaces or parentheses between digits. For long-distance numbers, also include 1 and the area code.
- You may not be able to enter certain phone numbers, or your phone system may require additional characters (for example, you may be required to enter an access code to dial outgoing numbers). If you are experiencing difficulties with this setting, contact your Connection administrator.
- Step 5** In the Rings to Wait field, enter the number of rings you want Connection to wait before transferring the call to voicemail or to the next destination in a destination group, depending on your other call transfer settings. The default value is four rings.
- Step 6** If you have set this destination to forward calls to Connection, check the **Loop Detection Enabled** check box.  
If you create a rule that transfers calls from Connection to a phone destination, you may inadvertently create a call-looping situation in which Connection forwards calls to your phone, and your phone consequently

forwards the call back to Connection, and callers may never be able to reach you. Selecting this setting when you configure this type of destination to forward calls to Connection can help eliminate call-looping problems.

**Step 7** Select **Save**.

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#### Related Topics

[About Destinations, on page 7](#)

## Changing Personal Destinations

### Procedure

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- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destinations**.
  - Step 2** On the Destinations page, select the name of the personal destination.
  - Step 3** On the Change Destination page, make the applicable changes and select **Save**.
- 

## Deleting Personal Destinations

You cannot delete a personal destination while it is being used in a destination group or in a rule. Delete the destination from the destination group or rule first, then delete the destination.

### Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destinations**.
  - Step 2** On the Destinations page, check the check box for the personal destination you want to delete. You can check multiple check boxes to delete more than one personal destination at a time.
  - Step 3** Select the **Delete Selected Rows** icon below the menu bar.
- 

#### Related Topics

[Deleting Destinations from Destination Groups, on page 12](#)

[Changing Rules, on page 20](#)

## Changing the Rings-to-Wait Setting for Phone Destinations

For phone destinations, you can change the Rings-to-Wait setting on the Destinations page.

### Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destinations**.
  - Step 2** On the Destinations page, in the Rings to Wait column, enter the new value for the number of rings you want Connection to wait before transferring the call to voicemail or to the next destination in a destination group.
  - Step 3** Select **Update**.
- 

## Changing the Loop-Detection Setting for Destinations

For phone destinations other than your primary extension, you can use the Loop Detection Enabled setting to indicate when you have configured a phone to forward calls to Cisco Unity Connection. For example, you may configure your mobile phone to forward all calls to Connection to store all your voice messages in Connection. If you then create a rule that transfers calls from Connection to your mobile phone, you may inadvertently create a call-looping situation in which Connection forwards calls to your mobile phone, and your mobile phone consequently forwards calls back to Connection, and callers may never be able to reach you.

Selecting this setting can help to eliminate the call-looping problem. If calls seem to be transferring from the phone destination to Connection and then back to the phone, Connection will either transfer the call to the next assigned device (if you have created a destination group) or transfer the call to voicemail if there are no additional destinations defined.



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**Note** When this setting is enabled, you can expect to hear a slight delay as Connection transfers the call to the next destination in the destination group, or to voicemail.

---

### Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destinations**.
  - Step 2** If you have set this destination to forward calls to Cisco Unity Connection, check the **Loop Detection Enabled** check box.
  - Step 3** Select **Update**.
- 

## About Destination Groups

Destination groups contain multiple destinations arranged in a sequence and stored under a single group name.

For example, to ensure that you receive calls from a specific contact, you might create a destination group with your primary extension, mobile, and home phone numbers, then create a rule that tells Cisco Unity Connection to transfer calls from the contact to the destination group. To be used in a rule, a destination group must contain at least one phone destination.

When a call is transferred to a destination group, Connection tries the destinations in the order listed until a phone is answered, until the caller leaves a voice message or hangs up, or until the last destination in the group is reached. If the group contains an SMS or SMTP destination, Connection sends the device a text message about the call.

If a destination is not answered, Connection prompts the caller to press 1 to continue waiting while it tries the next destination or to press 2 to leave a voice message. Connection waits for a phone to be answered based on the specified number of rings, which is set in the Rings to Wait field when you create a destination. If you do not specify a number of rings, Connection uses the default value of four rings. You can change the Rings to Wait setting anytime after you create a destination.

When Connection runs out of destinations, the call is forwarded to your default phone number or to the primary extension in the destination group, which is typically your primary extension.

### Related Topics

[Creating Destination Groups, on page 11](#)

## Creating Destination Groups

You can add any of your destinations to a destination group. You can also add a destination to more than one destination group. A destination group must contain at least one phone number.

The order of destinations within a group is important because Cisco Unity Connection dials the destinations from top to bottom as they appear in the list. After you add destinations to a group, you may need to reorder them to suit your needs.

### Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destination Groups**.
  - Step 2** On the Destinations Groups page, select the **New Destination Group** icon below the menu bar.
  - Step 3** On the Destination Group page, enter the name of the group.
  - Step 4** Select **Save**.
  - Step 5** On the Destination Group page, select **Add Destinations**.
  - Step 6** On the Add Destinations page, check the check box next to the destination that you want to add to the group. You can check multiple check boxes to add more than one destination at a time.
  - Step 7** Select **Add Destinations**.
  - Step 8** On the Destination Group page, enter numbers in the Priority column to specify the order in which you want Connection to try the destinations in the group. (For example, to call your mobile phone first and your home phone second, enter 1 for your mobile phone and 2 for your home phone.)
  - Step 9** Select **Save**.
- 

### Related Topics

[About Destination Groups, on page 10](#)

## Changing Destination Groups

You can change the group name, add or delete destinations from the group, and change the priority order of the destinations in the group.

### Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destination Groups**.
  - Step 2** On the Destination Groups page, select the name of the group.
  - Step 3** On the Destination Group page, change the group name or change the priority order of the destinations in the group.
  - Step 4** Select **Add Destinations** to add another destination to the group. To remove a destination from the group, check the check box next to the destination name and select **Delete Selected**.
  - Step 5** Select **Save**.
- 

## Deleting Destinations from Destination Groups

The last phone destination cannot be deleted from a destination group if that will result in the group having only SMS or SMTP destinations.

### Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destination Groups**.
  - Step 2** On the Destination Groups page, select the name of the group.
  - Step 3** On the Destination Group page, check the check box for the destination you want to delete from the group. You can check multiple check boxes to delete more than one destination at a time.
  - Step 4** Select **Delete Selected**.
- 

## Deleting Destination Groups

You cannot delete a destination group while it is used in a rule. Remove the destination group from the rule first, and then delete the destination group.



### Procedure

---

- Step 1** In the Personal Call Transfer Rules web tool, from the Destinations menu, select **View Destination Groups**.
  - Step 2** On the Destination Groups page, check the check box for the group you want to delete. You can check multiple check boxes to delete more than one destination group at a time.
  - Step 3** Select the **Delete Selected Rows** icon below the menu bar.
- 

### Related Topics

[Changing Rules, on page 20](#)





## CHAPTER 4

# Managing Rule Sets and Rules

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- [About Rule Sets and Rules, page 15](#)
- [Task List for Setting Up a Rule Set, page 16](#)
- [Creating Rule Sets, page 17](#)
- [Adding Rules to Rule Sets, page 17](#)
- [Changing Rules, page 20](#)
- [Reordering Rules in Rule Sets, page 20](#)
- [Testing Rule Sets, page 21](#)
- [Deleting Rule Sets, page 22](#)
- [Enabling and Disabling Rule Sets, page 22](#)
- [Setting Basic Transfer Rules to Apply Personal Call Transfer Rules, page 23](#)

## About Rule Sets and Rules

Personal call transfer rules allow you to consolidate how and where you want to receive calls. Using the Personal Call Transfer Rules web tool, you can create rules to transfer and screen calls based on caller identification, time of day, and meeting schedules. You can also set Cisco Unity Connection to transfer selected calls to a destination or destination group.

You can change the characteristics of your rules as frequently as you need. For example, you might create a rule that sends all calls from a co-worker to your mobile phone and later change the rule to send all calls except those from the co-worker to your mobile phone.

Rules can be general, such as “Send all my calls to voicemail.” Or they can be specific, such as “Send calls from Jane Smith to my mobile phone if she calls between 9:00 am and 10:00 am, and screen the call.”

A rule set is a group of one or more rules that you can enable on certain days and for a range of dates, according to your schedule. When the date or day specified for a rule set becomes current, Connection turns on the rule set and begins processing calls against it. Connection gives precedence to a rule set enabled for a range of dates over one enabled for day(s) of the week.

Connection uses the first rule in the set that matches the condition of an incoming call and applies it. Therefore, the way in which you order your rules within a set is important. In general, order rules from most specific to least specific.

To set up a rule set successfully, see [Task List for Setting Up a Rule Set](#), on page 16.

## Task List for Setting Up a Rule Set

To set up a rule set successfully, do the following tasks in the order listed.

- 1 Set up any personal contacts, caller groups, personal destinations, and destination groups that you plan to use in your rules. See the applicable topics:
  - "Managing Your Contacts" in the *User Guide for the Cisco Unity Connection Messaging Assistant Web Tool* at [http://www.cisco.com/en/US/docs/voice\\_ip\\_comm/connection/8x/user/guide/assistant\\_b\\_8xcucugasst.html](http://www.cisco.com/en/US/docs/voice_ip_comm/connection/8x/user/guide/assistant_b_8xcucugasst.html).
  - [Creating Caller Groups](#), on page 4
  - [Creating Personal Destinations](#), on page 8
  - [Creating Destination Groups](#), on page 11
- 2 Create a rule set. See [Creating Rule Sets](#), on page 17.
- 3 Add rules to the rule set. See [Adding Rules to Rule Sets](#), on page 17.
- 4 Order the rules correctly. See [Reordering Rules in Rule Sets](#), on page 20.
- 5 If you want Connection to ring your extension before applying your transfer rules, check the check box on the Preferences > Rule Settings page in the Personal Call Transfer Rules web tool. See [Changing Your Rule-Processing Preferences](#), on page 25.
- 6 Test the rule set, if applicable. See [Testing Rule Sets](#), on page 21.
- 7 Change rules as necessary. See [Changing Rules](#), on page 20.
- 8 Enable the rule set. See [Enabling and Disabling Rule Sets](#), on page 22.
- 9 Configure the basic transfer rules to apply personal call transfer rules. See [Setting Basic Transfer Rules to Apply Personal Call Transfer Rules](#), on page 23.

### Related Topics

[About Rule Sets and Rules](#), on page 15

## Creating Rule Sets

### Procedure

- 
- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, select **View Call Transfer Rule Sets**.
  - Step 2** On the Call Transfer Rule Sets page, select the **New Rule Set** icon below the menu bar.
  - Step 3** On the Rule Set page, enter a name for the new rule set. Choose a name that applies to the situation and is easy to remember. (For example, a rule set named “Workweek” might be active Monday through Friday, while a rule set called “Africa Trip” might be active during the calendar dates of that trip.)
  - Step 4** On the Media Master, select **Record** and record the name of the rule set.  
Cisco Unity Connection plays this name to identify the rule set when you access rule settings by phone.
  - Step 5** When you finish recording, select **Stop**.
  - Step 6** Select **Save**.
- 

### Related Topics

[Adding Rules to Rule Sets, on page 17](#)

## Adding Rules to Rule Sets

Once you have created a rule set, add one or more rules to it.



### Caution

Any contacts, caller groups, personal destinations, or destination groups that you plan to use in your rules must be created before you add rules. If they do not exist, you will not be able to set up your rules correctly.

### Procedure

- 
- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, select **View Call Transfer Rule Sets**.
  - Step 2** On the Call Transfer Rule Sets page, select the name of the rule set to which you want to add a rule.
  - Step 3** On the Rule Set page, in the Transfer Rules section, select **Add Rule**.
  - Step 4** On the Rule page, in the If the Call Is section, enter the applicable information that you want Connection to use when identifying calls or callers. At a minimum, you must choose a destination, destination group, or voicemail to which to transfer the incoming call. Use the following table to determine values for the fields.

Field	Considerations
From	Use with the Caller(s), Caller Group, Phone Number, and/or Call Source fields to set conditions for the caller identity in the rule.  Check the <b>From</b> check box, and select <b>From</b> or <b>Not From</b> in the list, as applicable.

Field	Considerations
Caller(s)	<p>Use to add callers to a rule.</p> <ol style="list-style-type: none"> <li>Check the <b>Caller(s)</b> check box, then select <b>Add Callers</b>.</li> <li>On the Find Contacts page, select the applicable tab, depending on whether you want to search the list of users in the Connection directory or your contacts list. You may be able to search for both users and administrator-defined contacts in the Connection directory. Administrator-defined contacts are indicated by an asterisk (*) next to the name in the search results list.</li> <li>Enter a name or partial name, and select <b>Find</b>.</li> <li>Check the check box next to the caller you want to add to the rule. You can check multiple check boxes to add more than one caller at a time.</li> <li>Select <b>Add Users</b> or <b>Add Contacts</b>, as applicable.</li> <li>To remove a caller from the rule, select the name, then select <b>Delete Selected</b>.</li> </ol>
Caller Group	<p>Use to add a caller group to a rule.</p> <p>Check the <b>Caller Group</b> check box, and select a caller group in the list. (Note that before you can use a caller group in a rule, you need to create the caller group.)</p>
Phone Number	<p>Use to add a phone number to a rule.</p> <p>Check the <b>Phone Number</b> check box, and enter the number that Connection will associate with the incoming call. Connection processes the rule only if the phone number of an incoming call matches exactly what you enter in the field. You can use the wildcard characters X and * to match more than one phone number:</p> <ul style="list-style-type: none"> <li>The X character matches any single digit in the range 0 through 9. For example, the pattern 9XXX matches the range of phone numbers from 9000 through 9999.</li> <li>The asterisk (*) character matches any sequence of digits. For example, the pattern 5556304* matches the phone numbers 5556304, 55563040, 55563041, 5556304100, and so forth.</li> </ul>
Call Source	<p>Use to include or exclude callers based on whether the caller can be identified by Connection as a known number (a Connection user, a contact, or a Connection administrator-defined contact) or as an unknown phone number (an external caller), if applicable.</p> <p>Check the <b>Call Source</b> check box, and select <b>Known Number</b> or <b>Unknown Number</b> in the list, as applicable.</p>
Received Between	<p>Use to set the time period during which Connection applies the rule to your incoming calls.</p> <p>Check the <b>Received Between</b> check box, and select <b>Received Between</b> or <b>Not Received Between</b> in the list, as applicable. Choose an hourly range from the hour and minute lists.</p>

Field	Considerations
I Am in a Meeting	<p>Use to have Connection use your Microsoft Outlook calendar to determine whether you are in a meeting when it applies the rule to an incoming call. Connection considers you to be in a meeting when your Outlook meeting time is scheduled as Busy. Any meetings set as Tentative, Free, or Out of the Office are not considered by Connection.</p> <p>Check the <b>I Am in a Meeting</b> check box, and select <b>I Am In a Meeting</b> or <b>I Am Not in a Meeting</b> in the list, as applicable.</p> <p><b>Note</b> This feature is not available on all systems. Ask your Connection administrator whether it is available to you.</p>

**Step 5** In the Then Transfer the Call To section, enter the applicable information that you want Connection to use when transferring calls. For a rule to be valid, you must specify either a destination, destination group, or voicemail. Use the following table to determine values for the fields.

Field	Considerations
Destination	<p>Use to have Connection transfer calls to the destination you specify.</p> <p>Select <b>Destination</b>, then select the destination name in the list.</p> <p><b>Note</b> SMS and SMTP destinations do not appear in the Destination list. To be used in a rule, the devices must be in a destination group with at least one phone number.</p>
Destination Group	<p>Use to have Connection transfer calls to the destination group you specify.</p> <p>Select <b>Destination Group</b>, then select the destination group name in the list.</p>
Voicemail	<p>Use to have Connection transfer calls directly to voicemail.</p> <p>Select <b>Voicemail</b>.</p>
Screen the Call	<p>Use to have Connection screen the incoming calls to which it applies the rule.</p> <p>Check the <b>Screen the Call</b> check box.</p> <p><b>Note</b> This option is available only if your Connection administrator has enabled screening options for you and there are screening options set on the Call Holding and Screening Options page in the Messaging Assistant web tool.</p> <p>If an incoming call does not match any of your defined rules, the call will be transferred to your primary extension using any call-screening options that are enabled. If you do not want these calls to be screened, create a rule by using wildcard characters that will match all calls, order it as the last rule in the rule set, and uncheck the <b>Screen the Call</b> check box.</p>

**Step 6** In the Preview section, select **Update Preview** to display a text version of the rule so you can confirm that it is correct before you add it to the rule set.

**Step 7** Select **Save** to add the rule to the rule set.

**Step 8** Repeat Step 1 through Step 7 for any additional rules you are adding to the set.

# Changing Rules

## Procedure

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- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, select **View Call Transfer Rule Sets**.
  - Step 2** On the Call Transfer Rule Sets page, select the name of the rule set that contains the rule you want to change.
  - Step 3** On the Rule Set page, in the Transfer Rules list, select the rule name.
  - Step 4** On the Rule page, make your changes.  
Use the tables in [Adding Rules to Rule Sets, on page 17](#) to determine values for the fields.
  - Step 5** In the Preview section, select **Update Preview** to display a text version of the rule so you can confirm that your changed version is correct.
  - Step 6** Select **Save**.
- 

## Related Topics

[Changing Your Rule-Processing Preferences, on page 25](#)

# Reordering Rules in Rule Sets

The order of rules in a rule set is important because Cisco Unity Connection processes the rules from the top of the list to the bottom, then applies only the first rule whose conditions are met by the incoming call.

If a rule set has more than one rule, arrange the rules from most specific to least specific to ensure that Connection applies the most specific rule to a call, rather than applying a more general rule to it.



**Tip** To change the priority of only one rule in a set, make your change to that rule in the Transfer Rules list on the Rule Set page, and click Update Priority. All other rules in the rule set will be reprioritized accordingly.

---

## Procedure

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- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, select **View Call Transfer Rule Sets**.
  - Step 2** On the Call Transfer Rule Sets page, select the name of the rule set.
  - Step 3** On the Rule Set page, enter a number in the Priority column to specify the order in which you want Connection to process the rules in the set. (For example, to process the “Send all my calls to voicemail” rule first, enter 1; to process the “Send calls from Jane Smith to my mobile phone” rule second, enter 2.)
  - Step 4** Select **Update Priority**. The rules are reorganized according to their priority and saved.
-



# Testing Rule Sets

Use the Call Transfer Rule Tester tool to see how Cisco Unity Connection would transfer an incoming call based on the rule(s) in a set. You might choose to test a rule set after building it to see if the rule applies to a specific caller or to an incoming call that reaches you at a specific time of day.

The Call Transfer Rule Tester tool is also a good way to diagnose a call-forwarding problem. For example, if a call was not forwarded in a way that you expected, enter the name of the actual caller and the time of day and date when the call was placed, and the Rule Tester can help you figure out the part of the rule set that Connection would apply to the incoming call.

To get results with the Call Transfer Rule Tester, the rule set that contains the rule you are testing must be enabled or active.

**Note**

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Contact your Connection administrator if you are unable to diagnose call-forwarding problems with the Call Transfer Rule Tester tool.

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**Procedure**

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- Step 1** In the Personal Call Transfer Rules web tool, from the Tools menu, select **Call Transfer Rule Tester**.
- Step 2** On the Call Transfer Rule Tester page, enter or choose the incoming-call conditions that you want to use for the test:
- Name or phone number of the caller. If you are testing for a known user (a user in the Connection directory or a contact), select **Select Caller** to add the user to the Rule Tester.
  - Time of day.
  - Calendar date.
  - Year.
  - Whether or not you are in a meeting.

To get accurate results with the Rule Tester tool, specify a date. If you do not specify a date, the rule is evaluated with the current date, which is the default.

You can combine the conditions in any way to test your rules. For example, you can specify the caller, time, date, and year. Or you can specify only the time of day and date.

- Step 3** Select **Test**.
- If an enabled or active rule applies to the call conditions that you specified, Connection displays the rule.
- If no enabled or active rule applies to the call conditions that you specified, Connection displays a message explaining that no matching rules were found.
- Tip** When using the Call Transfer Rule Tester to diagnose why a call was not forwarded in a particular way, start by defining broad call conditions. For example, provide a name and date. If the rule applies to the broad conditions, begin to narrow the conditions to single out the reason why your rule did not apply to the incoming phone call.
-

**Related Topics**

[Enabling and Disabling Rule Sets, on page 22](#)

## Deleting Rule Sets

**Procedure**

- 
- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, select **View Call Transfer Rule Sets**.
- Step 2** On the Call Transfer Rule Sets page, check the check box next to the rule set you want to delete.
- Step 3** Select the **Delete Selected Rows** icon below the menu bar.  
If the rule set is active, you will receive an error message that the rule set cannot be deleted.
- Step 4** Select **OK** to delete the rule set.
- 

## Enabling and Disabling Rule Sets

Enabling a rule set means to set the days or date range that it will be active. Cisco Unity Connection uses the schedule to apply rules to your incoming phone calls. You can schedule the active period in advance in the Personal Call Transfer Rules web tool.

Disabling a rule set means making it ineligible to be active.

Connection allows more than one rule set to be enabled within the same time period. When more than one rule set is enabled, a set enabled within a range of dates takes precedence over a set enabled by days of the week. When the range of dates is no longer applicable, the set enabled by days of the week is restored. Multiple rule sets cannot be enabled on overlapping dates.

**Procedure**

- 
- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, select **Enable Rule Sets**.
- Step 2** To enable a rule set for a range of dates:
- On the Enable Rule Sets page, in the Date Range section, select the rule set in the Rule Set column list that you want to enable. The check box in the Enabled column is checked automatically.
  - Set the applicable dates in the Start Date and End Date column lists.
  - To add another row, select **Add Date Range**, then repeat Step a and Step b to specify the date range for any additional rule sets.  
You can schedule several date ranges in advance. For example:
    - Vacation rule set, enabled March 1 to March 8
    - Work Travel rule set, enabled March 9 to March 11
    - Workweek rule set, enabled March 12 to March 31

Only the rule set enabled during the date range that includes the current date is active.

d) Select **Save**.

**Step 3** To enable a rule set for days of the week:

a) On the Enable Rule Sets page, in the Days of Week section, select the rule set in the Rule Set column list that you want to enable for the applicable days of the week. The check box in the Enabled column is checked automatically.

You can specify a rule set for one or more days of the week (for example, every Tuesday, every weekday, or every weekend), or you can choose Daily to apply the rule set to every day of the week.

b) Select **Save**.

**Step 4** To disable a rule set:

a) On the Enable Rule Sets page, uncheck the check box in the Enabled column. Alternatively, you can select **None** in the Rule Set column list.

b) Select **Save**.

---

### Related Topics

[Setting Basic Transfer Rules to Apply Personal Call Transfer Rules](#), on page 23

## Setting Basic Transfer Rules to Apply Personal Call Transfer Rules

Personal call transfer rules are used only if the active basic rule—the standard, alternate or closed transfer rule—is set to apply personal call transfer rules instead of the basic settings. Once you have created and enabled personal call transfer rule sets, you must set the basic transfer rules to apply personal call transfer rules.



**Note** You use the Messaging Assistant web tool to do the following procedure (not the Personal Call Transfer Rules web tool).

---

### Procedure

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**Step 1** In the Messaging Assistant web tool, from the Preferences menu, select **Transfer and Screening**.

**Step 2** In the Transfer Rule table, choose the basic transfer rule that you want to set to use personal call transfer rules.

**Step 3** In the When This Basic Rule Is Active field, select **Apply Personal Call Transfer Rules**.

**Step 4** Select **Save**.

**Step 5** Repeat Step 1 through Step 4 for each additional basic transfer rule that you want to set to use personal call transfer rules.

---





## CHAPTER 5

# Changing Your Preferences

- [Changing Your Rule-Processing Preferences, page 25](#)
- [Changing Your Call Holding and Call Screening Preferences, page 26](#)

## Changing Your Rule-Processing Preferences

You can enable and disable the processing of personal call transfer rules, and you can choose whether to have Cisco Unity Connection always ring the dialed extension first, before processing any active personal rules.

If you choose not to have Connection ring the dialed extension first, direct- and indirect-call behavior is different:

<b>Direct calls</b>	These calls ring the extension. If there is no answer, the call is routed to Connection, where personal call transfer rules are applied.
<b>Indirect calls</b>	These calls are routed through Connection, and personal call transfer rules are applied without ringing the extension.

Direct calls are those that dial your phone directly—for example when another Connection user dials your extension or when an outside caller dials your direct line, if you have one. Indirect calls are those that are routed to you from the Connection system, for example, from callers using the directory to reach you.

### Procedure

- Step 1** In the Personal Call Transfer Rules web tool, from the Preferences menu, select **Rules Settings**.
- Step 2** Check one of the following check boxes, as applicable:

Option	Description
<b>Disable All Processing of Personal Call Transfer Rules</b>	When checked, all personal call transfer rule sets are disabled and are not considered by Connection when processing incoming calls. Incoming calls are routed to the dialed extension. <b>Note</b> Existing rule sets are not deleted when the sets are disabled.

Option	Description
<b>Always Ring Primary Extension Before Applying Personal Call Transfer Rules</b>	<p>When checked, Connection rings the primary extension first before applying any rule sets, regardless of whether the incoming call is a direct or indirect call.</p> <p><b>Tip</b> If your phone is set to Call Forward Answer, check this check box to achieve consistent behavior when callers dial you directly and when callers dial your number through Connection. Your primary extension will always ring before Connection tries to locate you at other destinations.</p> <p>If you do not want your primary extension to ring at all, uncheck this check box and set the Call Forward Answer setting on your phone to Cisco Unity Connection.</p>

**Step 3** Select **Save**.

#### Related Topics

[Changing Rules, on page 20](#)

## Changing Your Call Holding and Call Screening Preferences

When a transfer rule is configured to transfer calls to your primary extension, you can indicate how you want Cisco Unity Connection to handle the calls when your phone is busy.

In addition, if your Connection administrator has enabled screening options for you, you can choose to have Cisco Unity Connection screen calls. Connection can ask for the name of the caller and play the name for you before connecting the call. It can also tell you when it connects the call, or give you the option of taking a call or transferring it to voicemail for the caller to leave a message. Each personal call transfer rule can be configured whether or not to screen calls that meet the rules criteria.



#### Tip

If an incoming call does not match any of your defined rules, the call will be transferred to your primary extension using any call screening options that are enabled. If you do not want such calls to be screened, use wildcard characters to create a rule that will match all calls and order it as the last rule in the rule set.

#### Procedure

**Step 1** In the Personal Call Transfer Rules web tool, from the Preferences menu, select **Call Holding and Screening**.

**Step 2** To change your call holding preferences, in the If My Extension Is Busy list, select how you want Connection to handle calls when your extension is busy:

Option	Description
<b>Send Callers to Voicemail</b>	Connection plays your greeting, then prompts the caller to leave a message.

Option	Description
<b>Put Callers on Hold Without Asking</b>	Connection puts the caller on hold and does not offer the option of leaving a message.
<b>Ask Callers to Hold</b>	Connection gives the caller the option of holding or leaving a message.

**Step 3** To change your call screening preferences, in the Screen Calls section, check one or more check boxes, as applicable:

Option	Description
<b>Tell Me When the Call Is Connected</b>	Connection tells you when it connects the call.
<b>Tell Me Who The Call Is For</b>	Connection plays the name associated with the dialed extension. Use this setting when two or more people share a phone.
<b>Ask Me If I Want to Take the Call</b>	Connection asks if you want to take the call or have the caller leave a message.
<b>Ask for Caller's Name</b>	Connection records the name of the caller and plays it for you before connecting the call.

Note the following considerations:

- For the option of declining a call for someone with whom you share a phone, check both the **Tell Me Who the Call Is For** and the **Ask Me If I Want to Take the Call** check boxes.
- For the option of accepting or declining a call based on the identity of the caller, check both the **Ask Me If I Want to Take the Call** and the **Ask For Caller's Name** check boxes.

When you accept, Connection connects the call. When you decline, Connection forwards the call to voicemail.

**Step 4** Select **Save**.

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