



Cisco Unified Communications Manager Assistant

This chapter provides information about setting up manager and assistant phones with either shared lines or proxy lines for the Cisco Unified Communications Manager Assistant. Information is also provided for adding and updating manager-assistant associations using a BAT spreadsheet, and for creating default and custom CSV data files for manager-assistants.

You can use the Cisco Unified Communications Manager Bulk Administration (BAT) to manage the Cisco Unified Communications Manager Assistant feature in Cisco Unified Communications Manager. You can add, update, and delete managers or assistants with their associations in bulk transactions. For more information that is related to Cisco Unified CM Assistant, see the *Cisco Unified Communications Manager Features and Services Guide* and the *Cisco Unified Communications Manager Assistant User Guide*.

- [Phones and Lines for Cisco Unified Communications Manager Assistant, page 1](#)
- [CSV Data File for manager-assistant associations, page 11](#)
- [Topics related to CVS data files for manager-assistant, page 14](#)

Phones and Lines for Cisco Unified Communications Manager Assistant

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

- Proxy mode—The primary manager line associates with a proxy line that has a different directory number on the assistant phone.
- Shared line mode—The manager and assistant have a shared line on their phones that uses the same directory number and partition.



Note

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

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

Related Topics

- [Set up phones in proxy line mode for Cisco Unified Communications Manager Assistant, on page 2](#)
- [Set up phones in shared line mode for Cisco Unified Communications Manager Assistant, on page 8](#)
- [Insert manager-assistant associations to Cisco Unified Communications Manager](#)

Set up phones in proxy line mode for Cisco Unified Communications Manager Assistant

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

Procedure

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- Step 1** Set up and configure Unified CM Assistant requirements for your system. Cisco recommends that you use the Cisco Unified CM Assistant Configuration Wizard. The wizard automatically creates the phone templates for Unified CM Assistant manager and assistant, route points, partitions, translation patterns, and calling search space for the Cisco Unified CM Assistant service. To run the Cisco Unified CM Assistant Configuration Wizard, ensure BAT and the wizard are on the same server. Refer to the Cisco Unified Communications Manager Features and Services Guide for information about running the Cisco Unified CM Assistant Configuration Wizard.
- Note** You can use the Cisco Unified CM Assistant Configuration Wizard only one time to set up the Unified CM Assistant configuration requirements for your system. After running the configuration wizard, you can only view, but not change, your configuration with the wizard.
- Step 2** To add new phones and users for managers and assistants, use the Unified CM Assistant manager and Unified CM Assistant assistant phone templates that the Cisco Unified CM Assistant Configuration Wizard produced on the BAT server. Use the BAT templates to configure phones for proxy mode only.
- Step 3** For existing manager and assistant phones, you can change the manager and assistant phones to correspond to the Unified CM Assistant phone templates by using either of these methods:
- You can use the Add Lines feature in BAT to modify existing phones to resemble the Unified CM Assistant phone templates.
 - You can delete the original phones and add new phones by using the Unified CM Assistant phone templates for managers and assistants.
- Step 4** After you configure the phones and lines for managers and assistants, you associate the manager and assistant lines for Unified CM Assistant control.
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Related Topics

- [Cisco Unified Communications Manager Assistant Manager phone template default settings, on page 3](#)
- [Add phone lines to existing phones and UDPs](#)
- [Add phones to database](#)

[Manager and assistant proxy line configurations, on page 4](#)

Cisco Unified Communications Manager Assistant Manager phone template default settings

The following table lists the default settings for the Unified CM Assistant manager phone template.

Table 1: Default settings for manager phone templates for proxy lines

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

The following table lists the default settings for the Unified CM Assistant assistant phone template.

Table 2: Default settings for assistant phone template for proxy lines

Field	Default Value
Softkey Template	Softkey Assistant
Phone Button Template	Standard Cisco Unified IP Phone 7960 Assistant
Expansion Module 1	14-button expansion module
One line on base phone and five lines on expansion module	For proxy lines, one line on base phone and five lines on expansion module have the following default configuration: <ul style="list-style-type: none"> • CSS = Generated_CSS_M_E • Partition = Generated_Everyone

Field	Default Value
Line 7 (On Expansion Module)	Intercom line <ul style="list-style-type: none"> • CSS = Generated_CSS_I_E • Partition = Generated_Everyone • Also configure auto answer with headset option.

Manager and assistant proxy line configurations

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

Manager 1 Phone:

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

Manager 2 Phone:

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

Assistant Phone:

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

Assistant Phone:

Lines 4 through 6 remain available for other manager associations.

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

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

Cisco Unified Communications Manager Assistant Manager phone line configurations

The following table lists all possible line configurations for a manager phone that BAT can set up when you are using manager-assistant associations.

Table 3: Manager phone line configuration

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

Unified CM Assistant phone line configurations

The following table lists the default line configurations for the assistant phones that BAT sets up during manager-assistant associations.

Table 4: Assistant phone line configurations

Number of Available Lines	Configuration
One line	Line 1—Proxy line Intercom line (none)
Two lines	Line 1—Primary line Line 2—Proxy line Intercom line (none)
Three lines	Line 1—Primary line Line 2—Proxy line Line 3—Intercom line

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

Proxy line example for Cisco Unified Communications Manager Assistant manager and assistant phones

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

Manager 1 Phone:

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

Manager 2 Phone:

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

Assistant Phone:

- Line 1—Assistant primary line (DN is 3333)
- Line 2—Proxy line 1 for Manager 1 (DN is 3455)
- Line 3—Proxy line 1 for Manager 2 (DN is 3656)
- Line 4—Proxy line 2 for Manager 1 (DN is 3366)
- Line 5—Proxy line 2 for Manager 2 (DN is 3666)
- Line 6—Available
- Line 7—Assistant intercom line

Assistant Phone:

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

Set up proxy lines on new manager and assistant phones for Cisco Unified Communications Manager Assistant

You can set up new Unified CM Assistant manager and assistant phones to use proxy lines.

Before You Begin

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

Procedure

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- Step 1** Choose **BAT Administration > Phones > Phones Template**.
The **Phone Template Configuration** window displays.

Note Because BAT Unified CM Assistant templates are write protected, if you want to make changes to these templates, you must make a copy of the template and then edit the template with your changes. See [Table 1: Default settings for manager phone templates for proxy lines, on page 3](#) for default manager phone template field descriptions. See [Table 2: Default settings for assistant phone template for proxy lines, on page 3](#) for default assistant phone template field descriptions.

- Step 2** Create the CSV data file for manager phones and another file for assistant phones using these options:
- a) Use the BAT spreadsheet and choose the Phones tab.
 - b) Use a text editor and refer to the manager or assistant template fields as a guide.
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What to Do Next

Follow the procedures in [Add phones to database](#) to insert new phones.

Set up proxy lines on existing manager and assistant phones for Cisco Unified Communications Manager Assistant

You can set up existing Unified CM Assistant manager and assistant phones to use proxy lines.

Procedure

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- Step 1** Choose **BAT Administration > Phones > Add Lines**.

The **Phone Add Lines** window displays.

- Step 2** You may need to copy and modify the Unified CM Assistant templates for BAT. See [Table 1: Default settings for manager phone templates for proxy lines, on page 3](#) for default manager phone template field descriptions, and see [Table 2: Default settings for assistant phone template for proxy lines, on page 3](#) for default assistant phone template field descriptions.
- Note** If you changed any configuration information (for example, partition names) when you ran the Cisco Unified CM Assistant Configuration Wizard, you must use the same configuration information for the fields when you edit the template.
- Step 3** Create the CSV data file for manager phones and another file for assistant phones using one of these options:
- Use the BAT spreadsheet and choose the Add Lines tab.
 - Use a text editor and use the manager or assistant template fields as a guide.

What to Do Next

You can set up manager and assistant lines on existing phones.

Related Topics

[Add phone lines to existing phones and UDPs](#)

[Topics related to CVS data files for manager-assistant, on page 14](#)

Set up phones in shared line mode for Cisco Unified Communications Manager Assistant

You can set up manager and assistant phones to use shared lines when you create a BAT template to add new phones in the Cisco Unified Communications Manager database. Use the procedures for setting up new phones using BAT.

Before You Begin

Before you can configure manager and assistant phones with shared line support, you must set up the Unified CM Assistant service parameters for shared line support in Cisco Unified Communications Manager. Refer to the Cisco Unified Communications Manager Features and Services Guide for information.



Note

If you have a Cisco Unified IP Phone model 7960, you need a phone button template with five or more lines.

Procedure

Create a BAT template to add new or update existing manager and assistant phones using the following guidelines:

- For manager phones, see [Manager phone settings for shared line mode, on page 9](#).
- For assistant phones, see [Assistant phone settings for shared line mode, on page 9](#).

What to Do Next

After you configure the phones and lines for managers and assistants, you must associate the manager and assistant lines for Unified CM Assistant control. Follow the procedures in the [CSV Data File for manager-assistant associations](#), on page 11.

Related Topics

[Add phones to database](#)

[Add phone lines to existing phones and UDPs](#)

Manager phone settings for shared line mode

When you create the BAT template to add new or update existing manager phones with shared lines, use the following phone settings:

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

Related Topics

[Add phones to database](#)

[Set up phones in shared line mode for Cisco Unified Communications Manager Assistant](#), on page 8

Assistant phone settings for shared line mode

When you create the BAT template to add new or update existing assistant phones with shared lines, use the following phone settings:

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



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

- Add a personal primary line.
- Add shared lines for each associated manager. Use the same directory number and partition as the primary line on the manager phone.
- Add an incoming intercom line (optional)
- Add speed dials to the managers intercom lines (optional)

- Set the user locale

Related Topics

[Add phones to database](#)

[Set up phones in shared line mode for Cisco Unified Communications Manager Assistant, on page 8](#)

Manager and assistant shared line configurations

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

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

Manager 1 Phone:

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

Manager 2 Phone:

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

Assistant Phone:

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

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

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

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

Related Topics

[Topics related to CVS data files for manager-assistant, on page 14](#)

CSV Data File for manager-assistant associations

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

You have two options for creating a CSV data file to add or update manager-assistant associations: using the BAT spreadsheet or using a text editor to create a text file in CSV format.

When you create an association for a new manager, you need to enter a device name. When you update a manager with an existing Unified CM Assistant record, consider these fields optional. BAT does not allow you to assign the intercom line of a manager to a proxy line for an assistant if the number of manager lines is greater than or equal to three.

Related Topics

[Add or update manager-assistant associations using BAT spreadsheet, on page 11](#)

[Managers and assistants file formats](#)

[Manager and assistant proxy line configurations, on page 4](#)

Add or update manager-assistant associations using BAT spreadsheet

Use the BAT spreadsheet to add new or update existing Unified CM Assistant associations. The BAT spreadsheet includes data file templates with macros to make it easy to add, update, or delete manager-assistant associations.

Procedure

Add new Unified CM Assistant associations using the BAT spreadsheet.

- a) To create manager-assistant associations with the default line configuration, see [Create default manager-assistant CSV data files, on page 12](#).
See [Table 3: Manager phone line configuration, on page 5](#) and [Table 4: Assistant phone line configurations, on page 5](#) for the default line configurations for the manager and assistant phones.
- b) To assign proxy lines that do not follow the default line configuration, see [Create custom manager-assistant CSV data files, on page 13](#).

Related Topics

[BAT spreadsheet data collection for CSV data file creation](#)

Manager-assistant association additions and updates using BAT spreadsheet

The BAT spreadsheet includes data file templates with macros to make it easy to add, update, or delete manager-assistant associations.

When you use the BAT spreadsheet to add new Unified CM Assistant associations, you can set up the manager-assistant configurations in two ways:

- Create manager-assistant associations with the default line configuration. For the default line configurations for the manager and assistant phones, see [Table 3: Manager phone line configuration, on page 5](#) and [Table 4: Assistant phone line configurations, on page 5](#).
- Assign proxy lines that do not follow the default line configuration using a custom CSV data file.

Related Topics

- [BAT spreadsheet data collection for CSV data file creation](#)
- [Create custom manager-assistant CSV data files, on page 13](#)
- [Create default manager-assistant CSV data files, on page 12](#)

Create default manager-assistant CSV data files

Use the BAT spreadsheet to create a CSV data file for inserting, updating, or deleting default manager-assistant associations for both proxy and shared mode.

After you have finished editing all the fields in the BAT spreadsheet, you can export the content to a CSV formatted data file. The file is saved to C:\XLSDataFiles or to your choice of another existing folder on your local workstation and is assigned a default filename:

```
<type of operation>ManagerAssistants-timestamp.txt
```

where `<type of operation>` can be either insert or delete, and “timestamp” represents the precise date and time that the file was created.

Procedure

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- Step 1** Download and open the BAT.xlt file to open the BAT spreadsheet.
- Step 2** When prompted, click **Enable Macros** to use the spreadsheet capabilities.
- Step 3** To display the manager-assistant association options, click the **Default Managers-Assistants** tab at the bottom of the spreadsheet.
- Step 4** Scroll to the right side of the template until you see the radio buttons and choose the type of associations for this transaction:
- One manager, multiple assistants
 - One assistant, multiple managers
- Step 5** Complete all mandatory fields and any relevant, optional fields.
- a) If you choose the **One manager, multiple assistants** radio button, enter the following information in each row:
- Manager ID—Enter the user ID, up to 30 characters, of the manager.
 - Assistant ID#—Enter the user IDs, up to 30 characters, for the assistants to whom the manager will be associated, where the # symbol represents the number of assistants assigned to a manager.
- Tip** To add more assistants, click **Add more Assistants**.

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

- Assistant ID—Enter the user ID, up to 30 characters, of the assistant.
- Manager ID#—Enter the user IDs, up to 30 characters, for the managers to whom the assistant will be associated. where the # symbol represents the number of managers assigned to an assistant.

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

Step 6 Choose the operation that you want to perform:

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

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

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

The system saves the file using the default filename `<type of operation>ManagerAssistants-timestamp.txt` to `C:\XLSDataFiles` or to your choice of another existing folder on your local workstation.

What to Do Next

You must upload the CSV data file to the Cisco Unified Communications Manager first node database server so BAT can access the CSV data file.

Related Topics

[Download file off server](#)

[Topics related to CVS data files for manager-assistant, on page 14](#)

[Upload file to server](#)

Create custom manager-assistant CSV data files

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

After you have finished editing all the fields in the BAT spreadsheet, you can export the content to a CSV formatted data file. The system saves the file using the default filename `Custom Manager-Assistants-timestamp.txt` to `C:\XLSDataFiles` or to your choice of another existing folder on your local workstation.

Procedure

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- Step 1** Download the BAT.xlt file from Cisco Unified Communications Manager server.
- Step 2** Open the BAT.xlt file. When prompted, click **Enable Macros** to use the spreadsheet capabilities.
- Step 3** To display the manager-assistant association options, click the **Custom Managers-Assistants** tab at the bottom of the spreadsheet.
- Step 4** Scroll to the right side of the template until you see **Number of Proxy Lines** box. In that box, enter the number of proxy lines that you are assigning to an assistant. The spreadsheet adds Proxy Line DN and Manager Line DN Columns based on the number that you enter. Complete all mandatory fields and any relevant, optional fields.
- Manager ID—Enter the user ID of the manager.
 - Device Name—Enter the device name that are assigned to the manager phone.
 - Intercom DN—Enter the directory number for the manager intercom line. (Optional)
 - Assistant ID—Enter the user IDs for the assistants to whom the manager will be associated.
 - Device Name—Enter the device name that are assigned to the assistant's phone.
 - Intercom DN—Enter the directory number for the assistant intercom line. (Optional)
 - Proxy Line DN#—Enter the directory number for the assistant proxy line.
 - Manager Line DN#—Enter the directory number for the manager primary line.

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

- Step 5** To transfer the data from the BAT spreadsheet into a CSV data file, click `Export to BAT Format` button.
- Tip** For information on how to read the exported CSV data file, click the link to **View Sample File** in the **Insert Managers/Assistants** window in BAT.
- The system saves the file using the default filename `Custom Manager-Assistants-timestamp.txt` to `C:\XLSDataFiles` or to your choice of another existing folder on your local workstation.
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What to Do Next

You must upload the CSV data file to the Cisco Unified Communications Manager first node database server so BAT can access the CSV data file.

Related Topics

- [Topics related to CVS data files for manager-assistant, on page 14](#)
- [Upload file to server](#)

Topics related to CVS data files for manager-assistant

- [Phones and Lines for Cisco Unified Communications Manager Assistant, on page 1](#)
- [CSV Data File for manager-assistant associations, on page 11](#)

- [Insert manager-assistant associations to Cisco Unified Communications Manager](#)
- [Set up phones in proxy line mode for Cisco Unified Communications Manager Assistant, on page 2](#)
- [Set up phones in shared line mode for Cisco Unified Communications Manager Assistant, on page 8](#)
- [Delete specific manager-assistant associations from Cisco Unified Communications Manager](#)

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

- [Cisco Unified Communications Manager Features and Services Guide](#)
- [Cisco Unified Communications Manager Assistant User Guide](#)

