



Get Started with the Assistant Console

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Get Started with Assistant Console

As assistants, you can access the Manager Assistant features on your computer using the Assistant Console application to handle calls for managers. The Manager Assistant handles calls for yourself and for as many as 33 managers.

On the Assistant Console, you can perform these call functions:

- Place, answer, divert, transfer, end, or hold a call.
- Add conference participants to a call.
- Perform speed dialing.
- Do directory searches.
- Open an intercom line to your manager. (If the intercom feature is not available on your phone, contact your system administrator.)
- Monitor manager call activity and change manager features and settings.
- Customize your call-handling tools.
- Enter numbers on a virtual keypad in response to interactive voice systems.

Log In and Out of the Assistant Console

Use these steps to log in and out of the Assistant Console. When you log in, you are online and ready to handle calls. In the **My Managers** panel, two green arrows next to a manager's name indicate that the manager is logged in and therefore expecting assistance. A manager whose name is dimmed is not expecting assistance.

If you click the **Settings** button in the **Log In** dialog box, you can monitor administrative settings, which your system administrator may ask you to do in case of a problem. Do not modify these settings unless your system administrator instructs you to do so.

Before You Begin

Obtain your username and password from your system administrator.

Procedure

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- Step 1** To log in to the Assistant Console, enter your username and password in the **Manager Assistant Log In** dialog box. (You can specify for your login information to be remembered.) The Assistant Console opens on your desktop. You are logged in until you log off or until your online, connected, or call-control status changes for some reason.
- Step 2** To log out, click **File > Exit** from the menu bar at the top. If you check the **Remember user ID and Password** option, you will be logged in automatically the next time that the Assistant Console is started on your computer. If you are using a shared computer, you may want to log out of the Assistant Console by clicking **File > Log Out** from the menu bar. When you log in the next time, the Assistant Console will display the **Log In** dialog box instead of logging you in automatically with your username and password.
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Explore the Console Without Assisting Managers

If you are using the Manager Assistant in proxy-line mode, you can go offline to familiarize with the Assistant Console without making yourself available to managers. In that case, the Manager Assistant moves managers to another assistant.

When you go offline, you cannot receive phone calls for managers, and the **My Managers** panel on your console is inactive.



Note

You cannot go offline to explore in the shared-line mode.

Go Offline and Back Online

Use these steps to go offline and back online.

When you are back online, you are available again, and the Manager Assistant may move managers back to you.

Your online status is visible from the status bar in the lower right corner of the console.

Procedure

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- Step 1** To go offline, log in as usual and click the **Go Offline** call-control button, which is the first icon button in the row of icons along the top or side of your screen. (You can also choose **File > Go Offline** from the menu bar.)
- Step 2** To go back online, click the **Go Online** call-control button based on your status. You can also choose **File > Go Online**.
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Use Menu Bar

You can use the menu bar, which is located at the top of the Assistant Console, as follows (context-sensitive menu commands):

- **File**—Go online and offline, log in and out, and exit the console.
- **Edit**—Create and edit speed dials, personalize keyboard shortcuts, change the divert target, set preferences, and access administrator settings.
- **View**—Specify text size and color schemes and refresh the default layout.
- **Call**—Dial, answer, hang up, place on hold, transfer, divert, or add conference participants to a call.
- **Manager**—Place an intercom call to a manager, access the Manager Configuration window, and enable or disable features for a manager. (If the intercom feature is not available on your phone, contact your system administrator.)
- **Help**—Access online help.

Use Call-Control Buttons

You can perform tasks from the Assistant Console by clicking call-control buttons (the row of icons located along the top or side of the console). Position your mouse over a call-control button to see a description of its function.











Call-control buttons are context-sensitive. A button's availability depends on the state of the selected call.





Before you click a button, make sure that the call is selected (highlighted).

You can right-click on the blank space (not on the buttons themselves) in the call-control panel to change its position on the console.

See the following table for a list of call-control buttons.

Table 1: “Call Control Buttons”

| Call-control button | What it does |
|---|---|
| Go Online  | <p>The Go Online and Go Offline buttons enable you to toggle your connection status on the Assistant Console.</p> <p>The Go Online button enables you to resume your online connection on Assistant Console to handle calls for your manager.</p> |
| Go Offline  | <p>The Go Online and Go Offline buttons enable you to toggle your connection status on the Assistant Console.</p> <p>The Go Offline button enables you to go offline and explore the console. You are unavailable to handle manager calls during this time.</p> |
| Dial  | <p>Opens a keypad that you can use to place outgoing calls.</p> |
| Answer  | <p>Connects you to an incoming call.</p> |
| Hang Up  | <p>Ends an active call.</p> |
| Hold  | <p>The Hold and Resume buttons allows you to toggle the hold status of a call.</p> <p>The Hold button places a call on hold.</p> |
| Resume  | <p>The Hold and Resume buttons allows you to toggle the hold status of a call.</p> <p>The Resume button takes a call off hold.</p> |
| Transfer  | <p>Transfers a connected call directly to the target number that you enter in a popup window.</p> |
| Consult Transfer  | <p>Works like the Transfer button but enables you to speak to the person to whom you want to transfer a call.</p> |
| Direct Transfer  | <p>Transfers one existing call to another existing call.</p> |

| Call-control button | What it does |
|---|---|
| Conference  | Enables you to add conference participants to a call. |
| Join  | Conferences multiple existing calls. You can join up to 15 simultaneous calls. |
| Redirect  | Immediately diverts a ringing, connected, or held call to the manager for whom the call was originally intended or to another target number. To specify your divert target, choose Edit > Redirect from the menu bar. |
| Transfer to VM  | Redirects a ringing or connected call to the manager's voice messaging system. |

Use My Calls Panel

The Assistant Console displays calls for you and for your managers in the **My Calls** panel. You can act on these calls using the Assistant Console tools.

Each call is displayed beneath its associated phone line.

Each phone line is displayed beneath one of these headings:

- My lines—Displays any currently active call that you have placed or received using your own phone line.
- Manager lines—Displays active calls that you are handling or can handle for your manager.
- Intercom—Displays the status of your intercom lines, if applicable.

Depending on the number of managers that are assigned to you, you will see 1 to 33 lines in the **Manager lines** section of the **My Calls** panel.

Each manager line contains the following:

- Either your manager's shared-line number or your manager's proxy extension number.
- The manager's name.
- Active call information—Active calls are represented with the following:
 - An animated icon indicating the status of the call (ringing, connected, or on hold)
 - The caller ID
 - A timer indicating the duration of the call

When transferring a call to a manager, you must enter the actual extension, rather than a proxy extension. You can see a manager's actual phone extension in the **My Managers** panel on the Assistant Console.

You cannot apply **Transfer to Voice Messaging** or **Redirect** to calls that you place or receive on your own phone line. These features apply only to calls you receive on a manager's line.

When you are using Manager Assistant in the shared-line mode, you can identify that your manager or another assistant has answered a call when you see a double red arrow next to your manager's line.

Use the My Managers Panel

You can use the **My Managers** panel in the Assistant Console to monitor call activity and feature status for each of your managers. You can also enable and disable a manager's features from this panel.

You can monitor, but cannot handle, calls that appear here. These calls have already been redirected to your manager, or your manager has placed or received these calls directly.



Note

Alert Tone, Do Not Disturb, Divert All, Assistant Watch, Filter Calls, and Filter Mode features are available only in proxy-line mode. My Managers Panel Display table describes the information that is displayed under each column heading in the **My Managers** panel.

Table 2: "My Managers Panel Display"

| Column Heading | What It Means |
|----------------|---|
| Manager | <p>Manager name. If the entire row of information for a manager is dimmed, the manager is not expecting you to handle calls. In addition, you may see these two different icons next to the manager icon:</p> <ul style="list-style-type: none"> • If you see two green arrows next to the manager icon, that manager is expecting you to handle calls. • If you see an envelope icon next to the manager icon, that manager has a voice message. |
| Intercom | <p>Click this column to place an intercom call to a manager.</p> <p>Note If the intercom feature is not available on your phone, contact your system administrator.</p> |
| DND | <p>If this box is checked, the Do Not Disturb (DND) feature is enabled. To toggle DND on and off, click the DND cell. The DND feature disables the ringer on the manager's phone; it does not redirect calls.</p> <p>Note If the DND feature is not available on your phone, contact your system administrator.</p> |

| Column Heading | What It Means |
|-----------------|--|
| DivAll | (Proxy-Line Mode Only) If this box is checked, the Divert All (DivAll) feature is enabled. To toggle Divert All on and off, click the DivAll cell. Divert All automatically redirects all incoming calls to the manager's divert target. |
| Assistant Watch | (Proxy-Line Mode Only) A check mark indicates that the manager has enabled Assistant Watch to view the caller ID and duration of calls that you are handling for that manager. |
| Alert Tone | (Proxy-Line Mode Only) A check mark indicates that calls to the manager generate an audio alert on the manager's phone. |
| Filter Enabled | (Proxy-Line Mode Only) If this box is checked, a call filter is active. To toggle the filter on and off, click the filter cell. Filters can route calls to you or to the corresponding manager, based on caller ID and filter mode. |
| Filter Mode | <p>(Proxy-Line Mode Only) There are two filter modes:</p> <ul style="list-style-type: none"> • Inclusive—Calls that match the numbers in the Inclusive filter are sent to the manager. The rest are redirected to you. • Exclusive—Calls that match the numbers in the Exclusive filter are redirected to you. The rest are sent to the manager. <p>To configure filters for a manager, use the Manager Configuration window. Right-click anywhere in a manager's row in the My Managers panel and choose Configure to open this window.</p> <p>Note In the initial default filter settings, the Inclusive filter is enabled and all manager calls are directed to you.</p> |

| Column Heading | What It Means |
|----------------|--|
| Call Details | <p>Call details consist of the manager's line number, the call duration, and the caller ID:</p> <ul style="list-style-type: none"> • Line—The actual extension number for the manager's primary phone line; a phone icon indicates the line state. • Call duration—The real-time duration of an active call that the manager placed or received. The timer starts as soon as a call is initiated (outgoing) or received (incoming). The timer stops when the call is dropped or transferred. • Caller ID—The name (if available) and number of the person to whom the manager placed a call or from whom the manager received a call. The Assistant Console displays forwarded call information when the information is available. |

Use Speed Dial Feature

The speed dial feature enables you to set up a personal phone book on the Assistant Console. You can place calls and perform other call-handling tasks using speed dial numbers.

To open the speed dial menu and view a list of available commands, right-click on the **Speed Dials** panel or choose **Edit > Speed Dials** from the menu bar.

If some speed dial commands are dimmed, try selecting a speed dial listing before opening the menu.

Use the speed dial menu to create and modify speed dial groups, place a call, specify a transfer target, and add conference participants to a call.

To access speed dial numbers quickly, consider organizing entries into speed dial groups. For example, you can create a personal group for yourself and a group for each of your managers.

When you add new speed dial listings, the listings appear in the order that you created them. To sort all the items in a speed dial list, click on a column header (Name, Telephone Number, or Notes). Lists are sorted alphabetically or numerically, depending on the header you choose. Click the header again to toggle between ascending and descending order.

You can make calls using your speed dial listings in one of these ways:

- Drag the speed dial entry to either your line or your manager's line.
- Make a call on your line or your manager's line by highlighting the line and double-clicking on the speed dial entry.
- Drag the speed dial entry to the dial button on your call-control panel and click **OK**.

Here are some quick ways to use your speed dial listings (without opening the speed dial menu):

- To perform a blind transfer to a person in your speed dial list, drag an active call to the person's speed dial listing.
- To add a new speed dial listing, drag and drop a listing from the **Directory** panel to the **Speed Dial** panel.

**Note**

Th sample speed dial group and example speed dial listing are inactive. They are included to demonstrate how speed dial information appears on the console. You can delete the samples at your convenience.

Use the Directory

Use the directory to search for a coworker and to place and handle calls using the search results.

To search for a coworker, enter any part of the person's first or last name or both in the search fields and click **Search**. Search results are sorted by first name, last name, phone number, and department. To clear search results and search fields, click **Clear**.

Here are some ways to use the search results:

- Double-click on a person's name or number to place a call.
- Right-click a person's name to display a popup menu containing relevant commands.
- To perform a blind transfer to a person in your directory, drag and drop an active call to the appropriate name or number.
- To add a new speed dial listing, drag a listing from the **Directory** panel to the **Speed Dials** panel.

Use Status Bar

The status bar is located at the bottom of your Assistant Console screen and displays this system information:

- Connected/Not Connected—Indicates the status of your connection to the Manager Assistant server.
- Online/Offline—Indicates your availability to managers.
- Call-Control Up/Call-Control Down—Indicates the availability of call-handling features.
- Filtering Down/Filtering Up—Indicates the availability of the call-filtering features.

The status bar also displays an icon to indicate if your console is set to appear automatically on your desktop when you receive an incoming call. Click this icon to toggle the feature on and off. (It is disabled by default.) When the feature is enabled, the icon appears darker (depressed).

You can also enable and disable this option from the **Edit > Preferences** menu.

Adjust the Console Layout

You can customize the size and position of panels in the Assistant Console. Use the **View** menu to change the color scheme and font and to refresh initial default settings.

You can set the console to appear automatically on your desktop when you receive an incoming call.

- 1 Choose **Edit > Preferences** from the main menu and then check the **Activate console on new call** check box.

An icon is located in the status bar at the bottom of your console screen. The icon appears darker (depressed) when the feature is enabled.

View Administrative Settings

You can view your administrative settings from the Log In dialog box or you can choose **Edit > Settings** from the menu bar. You do not need to modify settings unless your system administrator instructs you to do so.

These are the two types of settings:

- Basic Settings
 - Manager Assistant Server Host Name or IP address
 - Manager Assistant Server Port
- Advanced Settings
 - Displays the location where your trace files are stored.
 - Traces are enabled or disabled.

Set Preferences

You can enable these two settings in the **Preferences** menu:

- You can set the console to appear automatically on your desktop when you receive an incoming call. See [Adjust the Console Layout, on page 10](#)
- You can set your computer to launch the Assistant Console automatically when you start up your computer—To enable the automatic startup feature, choose **Edit > Preferences** from the main menu and then check the **Autostart Console on computer startup** check box. The Assistant Console will launch automatically the next time that you start up your computer.

To disable each of the features, uncheck the corresponding check box.

Use the Console with Your Mouse and Keyboard

The Assistant Console provides you with several mouse and keyboard combinations to perform tasks:

- Click, right-click, and double-click console items. For example: Click the **Answer** call-control button.
- Drag and drop console items. For example, you can drag and drop a selected call from the My Calls panel onto the Speed Dials panel to add a speed dial listing.
- Use keyboard shortcuts.

For example, you can choose from these options to answer a call:

- Right-click the call in the **My Calls** panel and then choose **Answer** from the pop-up menu.
- Use a keyboard shortcut.

**Note**

You can find all of the options for performing a specific task, such as transferring a call, in [Use Assistant Console to Handle Calls](#).

Use the Intercom Feature From the Console

The optional Intercom feature allows you to speak to a manager on an intercom line.

It is configured by your system administrator, so if the feature is not available on your phone, contact your system administrator.

To place an intercom call, do one of the following:

Procedure

Step 1 Double-click that manager's name in the **My Calls** panel.

Step 2 Click the **Intercom** button in the **My Managers** panel.

Step 3 Initiate the intercom call without specifying a manager.

Note This is available for all Cisco Unified IP phones except for the Cisco Unified IP Phones 7961G-GE, 7961G, 7960G, 7941G-GE, 7941G, and 7940G

Step 4 Click the **Intercom** button on the IP phone to speak to the assistant.

When you initiate this call, the manager's speakerphone answers automatically. You can begin talking using the speakerphone, headset, or handset. The manager at the top of the managers' list is the target for your intercom call. (And the manager you connect to through an intercom call becomes the target of your **Intercom** button.)

Note Only for the Cisco Unified IP Phones 7961G-GE, 7961G, 7960G, 7941G-GE, 7941G, and 7940G, if your manager is on another call when you initiate an intercom call, the call rings on the manager's phone and the manager answers the call manually to hear the intercom. (This is also the case when a manager places an intercom call to you at a time when you are on another call.) For other phones, the manager does not need to answer the call to hear the intercom.

Step 5 To end the intercom call, click the **Intercom** button again.

Use Keyboard Shortcuts

You can use keyboard shortcuts, rather than your mouse, to use most of the tools and features on the Assistant Console. Keyboard shortcuts can help you handle calls more efficiently.

You can use initial default shortcuts or you can customize shortcuts to suit your needs. The Manager Assistant remembers a customized shortcut the next time you log in.

View Shortcuts

Procedure

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- Step 1** Click an item in the menu bar to display commands and shortcuts.
A keyboard shortcut is associated with most menu commands.
- Step 2** Choose **Edit > Keyboard Shortcuts** to open the window and then select a menu command from the list to see the associated shortcut.

Example:

For example, if you select **Call > Answer** in the **Edit Shortcut Key** window, you can see that the initial default shortcut uses a combination of the Control key (Ctrl) and the A key (Ctrl-A).

Customize Keyboard Shortcuts

To customize a keyboard shortcut.

Procedure

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- Step 1** Choose **Edit > Keyboard Shortcuts** from the menu bar
- Step 2** Select a menu command from the list and press Ctrl, Shift, or Alt to assign the first part of the shortcut.
- Step 3** Enter a letter or number in the **Key** field to assign the last part of the shortcut.
- Step 4** Click **Save** to assign the new keyboard shortcut to the selected command.
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Use Shortcuts

To use a shortcut, hold down the first key in the shortcut combination and press the second key. For example, if you want to use the Ctrl-L shortcut to put a call on hold, hold down **Ctrl** and press **L**.

For keyboard shortcuts to work, the Assistant Console page must be the active window on your desktop.

How You and Your Manager Use the Manager Assistant

You will use the Manager Assistant features from your phone and the Assistant Console to handle calls for your manager. For example, when you answer a call for your manager, you may want to consult your manager by double-clicking the intercom line on your Assistant Console. If your manager chooses to pick up the call, you can forward the call by selecting the **Redirect** call button on the Assistant Console or by choosing the **Redirect** softkey on your phone. If your manager wants the caller to leave a voice message, you can forward the call to your manager's voice-messaging system by selecting the **Transfer to Voice Mail** call button or by choosing the **TrnsfVM** softkey.

Your manager uses the Manager Assistant features primarily from the Cisco Unified IP Phone, as in these examples:

- Your manager expects a call from a real-estate broker. Your manager would enable **Assistant Watch** to monitor the incoming calls. When the realtor's number appears, your manager can intercept the call with the **Intrcpt** softkey.
- Your manager can also press the **Redirect** softkey on the phone to divert a ringing call to you. Your manager can confirm that you have answered the diverted call and monitor the duration of the call by looking at the **Manager Assistant status** window on the phone's LCD screen.

You or your manager can customize manager features from the **Manager Configuration** window. To open this window, choose **Manager > Configuration** from the menu bar, or right-click anywhere in a manager's row in the **My Managers** panel and choose **Configuration**.

