



## For Assistants—Using the Manager Assistant on Your Phone

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- [For Assistants—Using the Manager Assistant on Your Phone, page 1](#)
- [Log In to the Manager Assistant on Your Phone, page 2](#)
- [Check the Status of Your Managers, page 4](#)
- [Handle Calls and Perform Other Actions, page 5](#)
- [Answer a Call Using Manager Assistant on the Phone, page 7](#)
- [Configure Manager Settings, page 7](#)
- [Configure Assistant Settings, page 10](#)
- [Customize the Distinctive Ringing feature, page 13](#)

## For Assistants—Using the Manager Assistant on Your Phone

This chapter describes how you can access Manager Assistant features directly on your Cisco Unified IP Phone (sometimes called the “Assistant Phone”).

You can use the buttons and softkeys on your phone to perform most tasks that you can perform using the Assistant Console. You can also use your phone to perform some tasks while you use the Assistant Console at the same time to perform other tasks. Also, features available on your phone are also available on the Assistant Console, with the exception of Distinctive Ringing.

To use the Manager Assistant on your phone, we recommend strongly that assistants support no more than five managers.

Also, several tasks cannot be performed on the phone, such as assigning the preferred assistants. The manager assigns these tasks using a website that your system administrator sets up, and you assign these tasks using the Assistant Console.

The Manager Assistant feature on your phone is supported on these Cisco Unified IP Phones:

- Cisco Unified IP Phones 7945G, 7942G, 7941G-GE, 7941G, and 7940G
- Cisco Unified IP Phones 7965G, 7962G, 7961G-GE, 7961G, and 7960G
- Cisco Unified IP Phone 7975G, 7971G-GE, and 7970G

**Note**

Before you begin, you must identify which mode your system administrator chose: shared-line or proxy-line. For more information about the modes and for which mode you are using, see [Shared-Line and Proxy-Line Modes Overview](#).

## Log In to the Manager Assistant on Your Phone

Use these steps to log in to the Manager Assistant on your phone.

### Procedure

- Step 1** Press the **Services** button on the phone.
- Step 2** Select **Primary IPMA Phone Service**.
- Step 3** Enter your user ID and PIN and then press **Submit**.

The Manager Status screen appears.

**Figure 1: Manager Status Screen**



### What to Do Next

If the Primary IP Manager Assistant(IPMA) service goes down, your IP Phone screen will not receive notification about this condition. However, you will receive a **Host not found Exception** message when you try to use a softkey. In this case, you must select **Secondary IPMA Phone Service** manually from the IP Services menu and log in again.

## Log In to the Manager Assistant on Cisco Desktop Collaboration Experience Phones

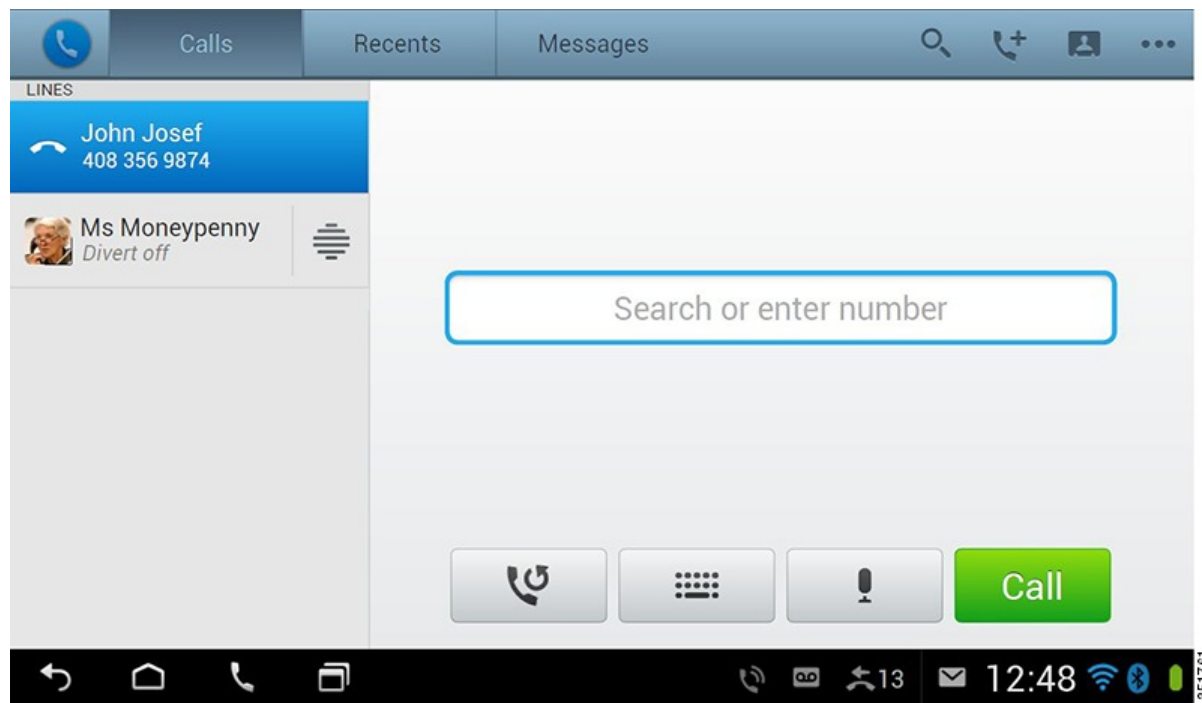
Use these steps to log in to the Manager Assistant on your phone.

### Before You Begin

Make sure that your phone is active

### Procedure

- Step 1** On the left pane, select **Turn Assistant On**.  
The **Assistant Sign In** screen appears
- Step 2** Enter your user ID and Password and then press **Sign in**.  
The Manager Status screen appears.



## Check the Status of Your Managers







You can see a list of managers that an assistant supports on the Manager Status screen. This topic describes the screen and the softkeys on it.

For each manager that an assistant supports, this information is displayed:

- Manager's Assistant Status line—Indicates if the assistant is online or offline.

- Number of managers in the list—Enables you to determine the number of managers quickly.
- Name of manager—The names are sorted based on new call indication, change of manager status from on hook or phone on hook.
- Call-status icon—The **Call Status** icons on the Manager Status Screen table describes the status icons that can appear to the left of the manager's name
- Proxy line of the manager

**Table 1: “Call Status Icons on the Manager Status Screen”**

Manager call status icon	What it does
Busy 	Appears if the manager's phone is busy (phone line is in use).
Hold 	Appears if the manager places a call on hold.
Idle/on hook 	Appears if the manager's phone is on hook.
Off hook 	Appears if the manager's phone is off hook (the handset is lifted or another audio device is in use).
Ring 	Appears next when the manager's phone is ringing.
Unknown 	Appears when Manager Assistant cannot determine the state, such as in the case of a CTI failure or when the manager is logged in.
MWI	MWI (which means message waiting indicator) appears if the manager has a voice message waiting.

## Handle Calls and Perform Other Actions

The table describes the softkeys that appear on the **Manager Status** screen. The softkeys enable you to perform a different call-handling tasks.

**Table 2: “Softkeys on the Assistant’s Phone”**

Softkey	What it does
Select	Selects the highlighted manager from the list of managers and takes you to the <b>Manager Settings</b> screen, where you can configure settings for the selected manager.
Answer	Answers an incoming call for the corresponding manager.
Exit	Exits the <b>Manager Status</b> screen and takes you to the <b>Services</b> menu page.
Redirect	<p>Immediately diverts a ringing, connected or on-hold call to the corresponding manager (by default) or to another preset number.</p> <p>To set the divert target to a directory number, press <b>AsstSett</b>, then press <b>Set Divert Target</b>, then enter the number.</p>
More	Shows the remaining available softkeys for the <b>Manager Status</b> screen.
TrnsfVM	Sends a ringing, connected, or on-hold call to that manager’s voice mailbox.
InterCom	Enables you to speak to a manager on an intercom line.
GoOffLine	<p>Takes you offline. If there is another assistant configured for the manager and if that assistant is online, that assistant becomes the active assistant for the manager.</p> <p>If no other assistants are available, calls for the manager are not filtered or diverted, and all ring at the manager’s phone.</p> <p><b>Note</b> When the primary assistant goes offline or logs out, the manager's phone and call status are shown on the phone of the next available assistant, which becomes the primary assistant.</p>
AsstSett	Takes you to the <b>Assistant Settings</b> screen, where you configure various settings. See <a href="#">Table 5: Assistant Settings Fields</a> , on page 11 for the fields you can configure.

# Answer a Call Using Manager Assistant on the Phone

You can answer a call to a manager displayed on the **Manager Status** page:

## Procedure

Select one of these options:

- Press the **Answer** softkey on the **Manager Status** page.
- Select the **Line** button of the ringing call or the speaker button.
- Exit the **Manager Assistant** application screen. The **Call Processing** screen appears. On the **Call Processing** screen, select the **Answer** button.

The **Call Processing** screen shows the originating number of the call and contains the **Answer**, **Redirect** and **TrnsfVM** softkeys.

# Configure Manager Settings

The **Manager Settings** screen, which appears when you select a manager from the list shown in the **Manager Status** screen.

This table describes how to set the fields in this screen.



### Note

If you press menu items too rapidly when change the manager settings from the Assistant Console, that manager is logged out as a security measure and the **Assistant Watch** window disappears. For the manager to be logged back in, a **Save** operation must be executed on that particular **Manager Configuration** web page.

**Table 3: "Manager Settings Fields"**

Softkey	What it does
Filter	<p>Toggles between <b>On</b> and <b>Off</b>. Change the setting of this field by highlighting the field and pressing <b>Select</b>. If this field is set to <b>On</b>, then the filter rules configured in the <b>Filter Mode</b> field apply.</p> <p><b>Note</b> To configure filters for a manager, you must use the Assistant Console. For more information, see <a href="#">Create Filter Lists for a Manager</a>.</p>

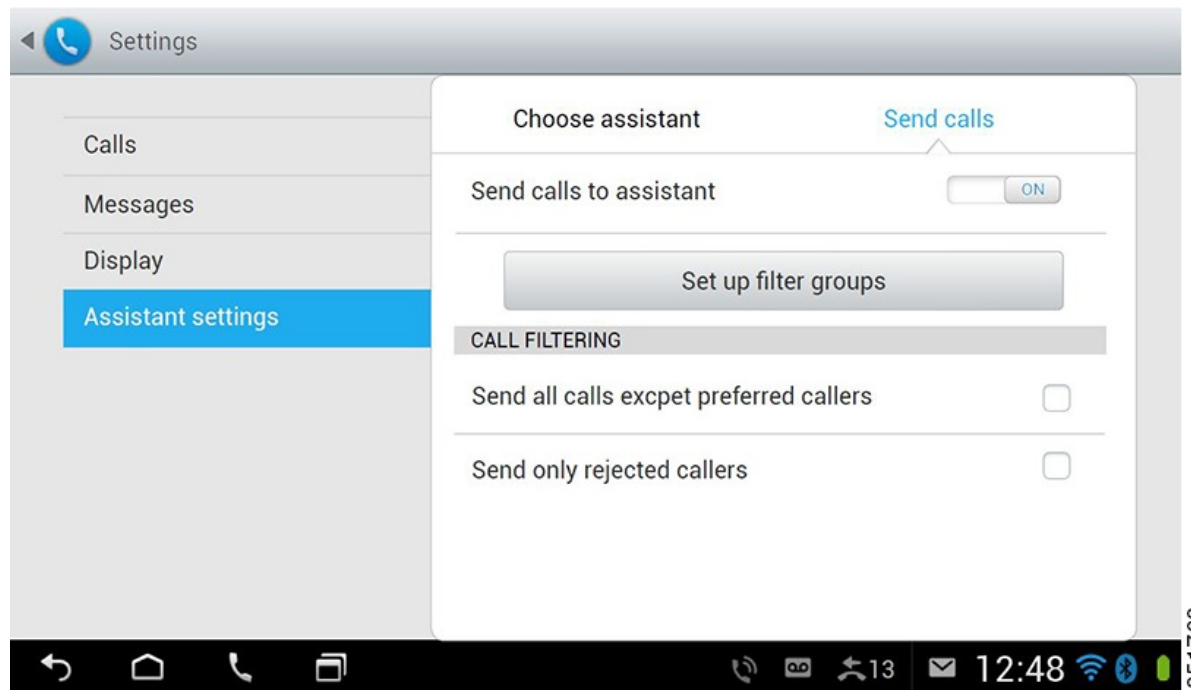
Softkey	What it does
Filter Mode	<p>Toggles between <b>Exclusive</b> and <b>Inclusive</b>. Change the setting of this field by highlighting the field and pressing <b>Select</b>.</p> <ul style="list-style-type: none"> <li>• <b>Exclusive</b>—Calls matching the phone numbers in the filter list are sent to the assistant; the remaining calls are sent to the manager.</li> <li>• <b>Inclusive</b>—Calls matching the phone numbers in the filter list are sent to the manager; the remaining calls are sent to the assistant.</li> </ul> <p>Permitted wildcard characters are X for a single digit and * for a string of digits at the beginning or end of a number only.</p>
Do Not Disturb	Turns off the ringer on the manager's phone. This task can be performed on a per-manager basis.
Divert Calls	<p>Toggles between <b>On</b> and <b>Off</b>. Change the setting of this field by highlighting the field and pressing <b>Select</b>. If this field is set to <b>On</b> then ringing, connected, or held call is sent to the manager or to another preset number (a number you specify by selecting the <b>Set Divert Target</b> field).</p>
Set Divert Target	<p>The number to which calls are diverted, if the <b>Divert Calls</b> field is <b>On</b>.</p> <p>Default: Calls are diverted to the corresponding manager's phone unless another Directory Number is configured here.</p>
Alert Tone	<p>Toggles between <b>On</b> and <b>Off</b>. Change the setting of this field by highlighting the field and pressing <b>Select</b>. If this field is set to <b>On</b> in a proxy-line environment, calls to the manager generate an audio alert on the manager's phone.</p>



## Display Manager Settings Screen on Cisco Desktop Collaboration Experience Phones

### Procedure

- Step 1** Press ... button
- Step 2** Select the **Phone Settings** from the drop-down menu.
- Step 3** On the **Manager Status** screen, select a manager from the list.  
The **Manager Settings** screen appears.



## Configure Manager Settings for Cisco Desktop Collaboration Experience Phones

This table describes how to set the fields on the **Manager Settings** screen.



### Note

If you press menu items too rapidly when you change the manager settings from the Assistant Console, that manager is logged out as a security measure and the **Assistant Watch** window disappears. For the manager to be logged back in, click **Save** on that particular **Manager Configuration** web page.

**Table 4: “Manager Settings Fields”**

Softkey	What it does
Choose Assistant	Press to select an assistant to apply the settings. <b>Note</b> To configure filters for a manager, you must use the Assistant Console. For more information, see <a href="#">Create Filter Lists for a Manager</a> .
Send calls to assistant	Toggles between <b>On</b> and <b>Off</b> .
Set up filter groups	Press to set up the filter groups. <b>Note</b> To configure filters for a manager, you must use the Assistant Console. For more information, see <a href="#">Create Filter Lists for a Manager</a> .
Send all calls except preferred calls to assistant	Toggles between <b>On</b> and <b>Off</b> .
Send only rejected callers	Toggles between <b>On</b> and <b>Off</b> .

## Configure Assistant Settings

The following figure shows the **Assistant Settings** screen, which displays when you press the **AsstSett** softkey on the **Manager Status** screen. The **Assistant Settings** screen lets you configure such items as divert targets and sorting for the **Manager Status** screen.

The Assistant Settings Fields table describes how to set the fields on the screen, and Assistant Settings Softkeys table describes how to use the softkeys on the screen.



**Table 5: “Assistant Settings Fields”**

Field	What it does
CallPlaneOverWrite	<p>Toggles between <b>Enabled</b> and <b>Disabled</b>. Change the setting of this field by highlighting the field and pressing <b>Select</b>. When you enable this field real-time updates while you are on a call is sent.</p> <p>It is useful to check if a manager’s status is busy or idle before diverting a call to that manager. With this field enabled, a change in the manager’s status displays while you are on a call.</p>

Field	What it does
SmartSorting	<p>Toggles between <b>Enabled</b> and <b>Disabled</b>. Change the setting of this field by highlighting the field and pressing <b>Select</b>. When you enable this field, the <b>Manager Status</b> screen is sorted based on new call events.</p> <p>For the hierarchy of how the managers list is sorted, see <a href="#">Check the Status of Your Managers</a>, on page 4.</p> <p>When this field is disabled, the <b>Manager Status</b> screen is static.</p>
SetDivertTarget	<p>When the <b>Divert All</b> field is set to <b>On</b> for a manager, incoming calls to that manager are diverted to the divert target, which is either the currently selected manager (by default) or a directory number.</p> <p>To divert calls to a Directory Number, enter the number in the <b>SetDivertTarget</b> field; to change a directory number, edit the <b>SetDivertTarget</b> field.</p>

Table 6: “Assistant Settings Softkeys”

Field	What it does
Select	<p>Press the button to change the settings for the two toggled fields on the screen—<b>CallPlaneOverWrite</b> and <b>SmartSorting</b>. If you highlight the <b>Set Divert Target</b> field and press <b>Select</b>, you are taken to the screen to configure the divert target number.</p>
StpUpdt/StrUpdt	<p>The <b>Manager Status</b> screen, by default, refreshes when a change in a manager’s status occurs or when there is a new call for a manager.</p> <p>The <b>StpUpdt</b> button prevents this automatic refresh.</p> <p>You might use this button, for example, if you have support 33 managers and would like to change the setting for the 20th manager.</p> <p>You would scroll down the manager list on the <b>Manager Status</b> screen, highlight the 20th name, and press <b>Select</b>.</p> <p>However, if your screen gets updated during this time, you would lose your place in the scroll list, as well as miss potentially important status updates.</p> <p>Therefore, to avoid refreshes from occurring in such a situation, press the <b>StpUpdt</b> button.</p> <p><b>Note</b> To re-invoke the automatic updates, press the <b>StrUpdt</b> button.</p>

Field	What it does
Exit	Exits out of the <b>Assistant Settings</b> screen and returns you to the <b>Manager Status</b> screen.
LogOut	Logs you out of the IPMA service. You must login to the service again after you log out.

## Customize the Distinctive Ringing feature

Distinctive Ringing enables you to associate a unique audible ring type with each of your phone lines. You can associate a unique ring type with your manager's proxy line to distinguish quickly between your incoming calls and your manager's incoming calls.

Use this procedure to customize the Distinctive Ringing feature directly on your phone.

### Procedure

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- Step 1** Press the **Settings** button on your Cisco Unified IP Phone.
  - Step 2** Use the **Navigation** pad to select **Ring Type** from the **Settings** menu (or press **2** on your phone keypad). Each of the lines on your phone, along with its selected ring type, is displayed on your phone LCD screen. Initially, all of these lines use the default ring type.
  - Step 3** To change the ring type for a line, use the **Navigation** pad to select the line, and press the **Select** softkey.  
**Note** To identify which manager proxy line on your phone is associated with a particular manager, look at the **My Calls** panel of the **Assistant Console**. This is the area where manager proxy lines and manager names are displayed. (A manager's proxy line is the line on which you receive incoming calls for that manager.)
  - Step 4** Use the **Navigation** button to scroll through the list of available ring types for the selected line. To hear a sample of any ring type, select the ring type, and then press the **Play** softkey.
  - Step 5** To associate a new ring type, press the **Select** and **OK** softkeys and then press **Exit**.
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