For Managers—How to Use Cisco IPMA on Your Phone

Cisco IP Manager Assistant (Cisco IPMA) provides the following features for managers:

- Call-routing—Selectively redirects incoming calls to your phone or to your assistant's phone based on your custom filter list.

- Additional call-handling and monitoring features on your Cisco IP Phone—Provides new softkeys and a status window on your phone's LCD screen; provides access to a Cisco IPMA menu from the Services button on your phone.

- Intercom capabilities—Allows you to place intercom calls to your assistant and receive intercom calls from your assistant.

- Web-based feature configuration—Allows you to customize some manager features, such the Divert All (DivAll) target, using the Manager Configuration window. Alternately, your assistant can configure these features on your behalf from the Assistant Console.

See the following topics for more information:

Getting Started—for Managers

These topics can help you get started with Cisco IPMA:

Understanding Assistant Selection

As a manager, you are always logged in to the Cisco IPMA feature.

To handle your calls, your assistant must log in to the Cisco IPMA Assistant Console application and must remain online. If your active assistant logs out or goes offline, Cisco IPMA will attempt to assign another assistant to you.

Identifying your active assistant

Your *active* assistant is the person who is currently handling calls on your behalf.

If you have multiple assistants, you might want to identify which assistant is currently active. To do so, press the **Services** button on your phone and select the Cisco IPMA service. Item 3 identifies your active assistant.

Assigning your default assistant

Whenever possible, Cisco IPMA assigns your *default* assistant to serve as your active assistant. If your default assistant is unavailable (offline or logged out), Cisco IPMA assigns another assistant until your default assistant logs in or restores online availability.

You (or your assistant) can choose your default assistant from the Manager Configuration window. For details, see the "How to Assign a Default Assistant to a Manager" section on page 5-3.

Changing assistants

If you have multiple assistants and more than one of them is logged in and online, you can override automatic selection by manually choosing your active assistant.

Select item **3** from the Cisco IPMA menu on your phone to see a list of available assistants. If multiple assistants are available, select another assistant to serve as your active assistant. Exit from the menu when you are done.

When your assistants are not available

If all of your assistants are unavailable, the Assistant icon (left-most icon) in the Cisco IPMA status window on your phone appears crossed out. Your call-handling support will resume as soon as one of your assistants logs in.

Related Topics

- Getting Started—for Managers, page 4-2
- How to Intercept, Divert, and Transfer Calls, page 4-6
- How Call Filtering Redirects Your Calls, page 4-10
- How to Use the Intercom Feature to Speak to an Assistant, page 4-12
- How to Mute the Ringer on Your Phone, page 4-13

Using the Status Window

For Managers

The Cisco IPMA status window appears on the LCD screen of your Cisco IP Phone.

There are two areas within the Cisco IPMA status window:

- Assistant Watch area—The top portion of the status window displays the caller ID and the elapsed time for a call that is being handled on your behalf by an assistant. See Table 4-1 for details.
- Assistant and Features area—The largest portion of the status window displays icons to indicate the presence of an active assistant and the on/off status of your features. See Table 4-2 for details.

Table 4-1   Assistant Watch messages in the Cisco IPMA status window

Message	Meaning
"Assistant Watch - ON"	Assistant Watch is on but there are no connected or incoming calls being redirected to your assistant at the moment.
"Call from" followed by caller ID	An incoming call was redirected to your assistant and is currently ringing on your assistant's phone. You can intercept the call now.
Caller ID and a timer	The incoming call has been answered by the assistant. The timer begins once the assistant answers (or otherwise handles) the call.
"Assistant Watch - OFF"	Assistant Watch is off. To set it to on, press the **SetWtch** softkey.

Table 4-2   Assistant and Feature icons in the Cisco IPMA status window

Feature	Associated icon	Notes
Assistant Availability	The assistant icon resembles a person and is located on the left side of your status window. The icon indicates whether or not an assistant is ready to handle calls on your behalf. If the icon has a line across it, all of your assistants are unavailable. If the icon does not have a line across it, an active assistant is ready to take your calls.	To identify your active assistant, press the **Services** button on your Cisco IP Phone, then select the Cisco IPMA service.
Call Filtering	A mesh-filled circle indicates that filtering is *on*; a hollow circle indicates that filtering is *off*.	To toggle the filter off and on, select **Filter** from the Cisco IPMA menu. You or your assistant can configure call filtering.
Do Not Disturb	A bell indicates that the feature is *off* (ringer is enabled); a crossed-out bell indicates that the feature is *on* (ringer is disabled).	To toggle the Do Not Disturb feature on and off, press the **DND** softkey.

Table 4-2   Assistant and Feature icons in the Cisco IPMA status window (continued)

Feature	Associated icon	Notes
Divert All	An arrow deflected by a barrier indicates that the feature is *on* (calls are being redirected away from your phone); a straight arrow indicates that the feature is *off* (calls are being directed to your phone).	To toggle the Divert All feature on and off, press the **DivAll** softkey. The initial default target for this feature is your selected assistant. You can change the target from the Manager Configuration web page.

Tips

- The status window is not visible when you are using your phone to place or receive calls.
- Press the **SetWtch** softkey to toggle Assistant Watch off and on.

Related Topics

Using the Cisco IPMA Menu on Your Phone

For Managers

To open the Cisco IPMA menu on your phone, press the **Services** button and choose the Cisco IPMA service. Table 4-3 describes Cisco IPMA menu items and associated tasks.

Table 4-3   Cisco IPMA menu items and associated tasks

Cisco IPMA menu item		What it does
1	Filter	Toggles call filtering off and on.
2	Filter Mode	Toggles between Inclusive or Exclusive filters.
3	Assistant	Displays your active assistant and other available assistants.

Related Topics

- Getting Started—for Managers, page 4-2
- How to Intercept, Divert, and Transfer Calls, page 4-6
- How Call Filtering Redirects Your Calls, page 4-10
- How to Use the Intercom Feature to Speak to an Assistant, page 4-12
- How to Mute the Ringer on Your Phone, page 4-13

How to Intercept, Divert, and Transfer Calls

For Managers

You can use Cisco IPMA softkeys on your phone to intercept, divert, transfer, and otherwise handle an active call.

This section covers the following topics:

- How to Intercept a Call that is Ringing on the Assistant's Phone, page 4-7
- How to Immediately Divert an Incoming Call to Another Number, page 4-7
- How to Divert All Calls to Another Number, page 4-8
- How to Transfer a Call to Voice Mail, page 4-9

How to Intercept a Call that is Ringing on the Assistant's Phone

For Managers

Press the **Intrcpt** softkey on your Cisco IP Phone to intercept a call that is ringing on your assistant's phone and to redirect the call to your own phone.

To successfully intercept the call, you must press the Intrcpt softkey before your assistant answers the call; you cannot intercept calls that have already connected.

Tip   When a call for you is ringing on your assistant's phone, you can see the text "Call from" and the caller ID in the Assistant Watch portion of the status window on your phone.

Related Topics

How to Immediately Divert an Incoming Call to Another Number

For Managers

Press the **ImmDiv** softkey to divert a call that is ringing, connected, or on hold from your phone to another phone.

By default, the Immediate Divert (ImmDiv) feature redirects calls to your selected assistant. However, you or your assistant can substitute any phone number as the Divert target.

Tips

- If the assistant is the designated ImmDiv target and if you have Assistant Watch on, you can verify that the call has been diverted to your assistant by looking at the status window on your LCD screen.

- The ImmDiv feature and the Divert All (DivAll) feature share the same Divert target. You or your assistant can change this target from the Manager Configuration window.

Related Topics

How to Divert All Calls to Another Number

For Managers

Press the **DivAll** softkey to toggle the Divert All (DivAll) feature on or off. When this feature is on, DivAll redirects your incoming calls to another phone.

Unlike ImmDiv, which you invoke on a call-by-call basis, DivAll allows you to redirect all future incoming calls until you set the feature to off.

By default, the DivAll target is your selected assistant. However, you or your assistant can substitute any phone number as the Divert target.

Tips

- An icon in the Cisco IPMA status window indicates whether the DivAll feature is on or off. A deflected arrow indicates that the feature is on; a straight arrow indicates that the feature is off.

- DivAll applies to your primary line; it cannot redirect the incoming calls that you receive on a secondary line or on an intercom line.

- The DivAll feature and the Immediate Divert (ImmDiv) feature share the same Divert target. You or your assistant can change this target from the Manager Configuration window.

- If you have both call filtering and DivAll enabled, Cisco IPMA first applies *call filtering* to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, Cisco IPMA applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.

Related Topics

- Getting Started—for Managers, page 4-2
- How to Intercept, Divert, and Transfer Calls, page 4-6
- How Call Filtering Redirects Your Calls, page 4-10
- How to Use the Intercom Feature to Speak to an Assistant, page 4-12
- How to Configure the Divert Target for a Manager, page 5-4

How to Transfer a Call to Voice Mail

For Managers

Press the **TrnsfVM** softkey to immediately send a call that is ringing or connected from your phone to your voice mail.

Related Topics

- Getting Started—for Managers, page 4-2
- How to Intercept, Divert, and Transfer Calls, page 4-6
- How Call Filtering Redirects Your Calls, page 4-10
- How to Use the Intercom Feature to Speak to an Assistant, page 4-12
- How to Mute the Ringer on Your Phone, page 4-13

How Call Filtering Redirects Your Calls

For Managers

Call filtering selectively redirects some of your incoming calls to your assistant, based on the caller ID and the following configurations and settings:

- Filter Mode

- Filter Lists

- Filter on/off status

Table 4-4 provides details about each of these filter settings.

Note The initial default settings are such that Inclusive call filtering is on and filter lists are empty; therefore all of your incoming calls are redirected to your assistant. To customize filtering, see the "How to Create Filter Lists for a Manager" section on page 5-5.

Table 4-4   Call Filtering settings

Setting	Purpose	Where to find it	Notes
Filter Mode	Use the filter mode setting to toggle between *Inclusive* and *Exclusive* filter lists. Inclusive filtering—In this mode, Cisco IPMA sends incoming calls that match numbers in your Inclusive filter list to *you*; the remainder are redirected to your assistant. Exclusive filtering—In this mode, Cisco IPMA redirects incoming calls that match numbers in your Exclusive filter list to your *assistant*; the remainder are sent to you.	Toggle between Inclusive and Exclusive filter lists from the Cisco IPMA menu on your phone's LCD screen.	By initial default, the Inclusive filter is active. Assistants can control the filter mode on your behalf from the Assistant Console.

Table 4-4   Call Filtering settings (continued)

Setting	Purpose	Where to find it	Notes
Filter Lists	Filter lists consist of one or more phone numbers (partial or entire). When you get a new call and filtering is on, Cisco IPMA compares the caller ID to the numbers in your active list. Depending on whether the numbers match and which filter list is active (Inclusive or Exclusive), Cisco IPMA then routes the call to you or to your assistant.	Create filter lists from the Manager Configuration window. Choose the Inclusive or Exclusive Filter tab.	Your assistant can set up filter lists for you. By initial default, filter lists are empty.
Filter on/off status	The filter on/off setting toggles call filtering on or off. When the feature is on, all of your incoming calls are intercepted and redirected according to filter settings.	Toggle filtering on and off from the Cisco IPMA menu on your phone's LCD screen. Press the **Services** button and choose the Cisco IPMA service, then select **Filter**.	The initial default setting for the filter is on.

Tips

- If you have both call filtering and Divert All (DivAll) enabled, Cisco IPMA first applies *call filtering* to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, Cisco IPMA applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.

- A circle icon in the Cisco IPMA status window indicates whether the call filtering feature is on or off. A mesh-filled circle icon indicates on; a hollow circle indicates off.

Related Topics

How to Use the Intercom Feature to Speak to an Assistant

For Managers

The Intercom feature allows you to speak to your assistant over an intercom line.

To place an intercom call on your Cisco IP Phone, press the **intercom** speed dial button that corresponds to your assistant.

If your assistant is not on another call when you initiate an intercom call, your speakerphone and your assistant's speakerphone will open simultaneously. You can then converse using your phone's speakerphone, headset, or handset. This is the case when your assistant places an intercom call to you, as well.

If your assistant is busy on another call when you initiate an intercom call, the intercom call will ring on the assistant's phone and must be answered manually. This is also the case when your assistant places an intercom call to you at a time when you are on another call.

To end the intercom call, hang up the phone (or push the speaker or headset button).

Related Topics

- Getting Started—for Managers, page 4-2
- How to Intercept, Divert, and Transfer Calls, page 4-6
- How Call Filtering Redirects Your Calls, page 4-10
- How to Mute the Ringer on Your Phone, page 4-13

How to Mute the Ringer on Your Phone

For Managers

Press the **DND** softkey to toggle the Do Not Disturb feature on or off. When this feature is on, the ringer is disabled on your Cisco IP Phone. DND disables the ringer for all lines on the phone, including intercom lines.

The initial default setting is off.

Tips

- This feature does not affect call filtering.
- An icon in the Cisco IPMA Status Window indicates whether the Do Not Disturb feature is on or off. A bell icon indicates that DND is off and your ringer is functioning as usual. A crossed-out bell indicates that the feature is on and your ringer is muted.

Related Topics

■ **How to Mute the Ringer on Your Phone**