Cisco Unified Attendant Console Advanced - User Guide

Version 14.0.1
October 22, 2021

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www.cisco.com

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Text Part Number: OL-29382-01

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Preface

This guide describes the Cisco Unified Attendant Console: a Windows application that works exclusively with Cisco Unified Communications Manager to provide telephone switchboard functionality on your computer.

Cisco Unified Attendant Console Advanced enables you to answer calls from multiple queues and transfer them to extensions. It also enables you to park and retrieve calls, and create conference calls.

Purpose of this Guide

This guide provides an understanding of the Cisco Unified Attendant Console:

- Interface (definition and customization options)
- Directory management and user presence status
- Call control functions

Who Should Read this Guide

The document is intended for Cisco Unified Attendant Console users, and the staff who train them.

Organization

This guide includes the following chapters:

Chapter	Title	Description
1	Getting Started	This chapter explains the Cisco Unified Attendant Console Advanced interface, and how to start and log in to the application.
2	Customizing Cisco Unified Attendant Console Advanced	This chapter explains how to configure and customize the application.
3	Managing Directories and Speed Dials	This chapter explains how to manage and configure Personal Directory Groups and Speed Dials.

Chapter	Title	Description
4	Managing Directory Contacts	This chapter explains how to add, delete and modify directory contacts.
5	Using the Directories	This chapter explains how to search directories and view additional information associated with contacts.
6	Call Controls	This chapter explains how to make, answer and clear calls, take notes, hold, and transfer calls.
7	Log Collection	This chapter explains how to collect logs.
A	Console User Client with JAWS Quick Reference	This appendix can be used as a quick reference guide to JAWS.

Conventions

This document uses the following conventions:

Convention	Indication
bold font	Commands, keywords, GUI labels and user-entered text appear in **bold** font.
italic font	Document titles, new or emphasized terms, and arguments for which you supply values are in *italic* font.
<argument>	Arguments for which you supply values are in angle brackets
Option1 > Option2	The relationship between menu/sub-menu items is shown using **>**. For example, “In the menu, click **Option1**, and then in the sub-menu click **Option2**”, is written “Choose **Option1 > Option2**”.

Note Means *reader take note*.

Tip Means *the following information will help you solve a problem*.

Caution Means *reader be careful*. In this situation, you might perform an action that could result in equipment damage or loss of data.

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, submitting a service request, and gathering additional information, see the monthly *What’s New in Cisco Product Documentation*, which also lists all new and revised Cisco technical documentation:

http://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html.

Subscribe to the *What’s New in Cisco Product Documentation* as an RSS feed and set content to be delivered directly to your desktop using a reader application. The RSS feeds are a free service. Cisco currently supports RSS Version 2.0.

Getting Started

This chapter describes how to start using Cisco Unified Attendant Console; it includes the layout of its interface, and its most frequently used functions. It also describes how to collect data from the Console log file.

Note Cisco Unified Attendant Console Advanced will only work once the relevant telephony software and hardware has been installed and configured, as described in the *Cisco Unified Attendant Console Advanced Administration and Installation Guide*. Contact your system administrator to configure your system.

Accessibility for Users with Disabilities

Cisco Unified Attendant Console Advanced provides accessibility features that make it easier for blind people and people with low vision to use the application. Features include:

- Adjustable font size: to modify select **Options > Font Size** from the menu bar. For more information see Customizing Cisco Unified Attendant Console Advanced.
- Mouse or keyboard controls: users have the flexibility of using the keyboard and/or mouse for all console related activities.
- Tool tips: console control icons display tool tips when you hover the mouse pointer over them.
- JAWS screen reader plug in supportability (see Console User Client with JAWS Quick Reference): JAWS provides information about the status of your attendant console as well as reading the text in your attendant console interface. Contact your system administrator if you require use of this feature.
  - JAWS screen reader script installation and console user profile configuration instructions can be found in the *Administration and Installation Guide*.
- Context-sensitive help menus: for help with a specific window or pane, press **F1**.

For more information on Cisco's Accessibility Program, contact us through the following link: http://www.cisco.com/web/about/responsibility/accessibility/contact.html.

Using the Keyboard

Most call control operations can be performed using either the mouse or the keyboard. Table 1-1 shows the keyboard shortcuts within Cisco Unified Attendant Console.

Table 1-1 Keyboard Shortcuts

Key Name	**Description**
Up Arrow	Move towards the start of a list.
Down Arrow	Move towards the end of a list.
Left Arrow	Scroll a list left or select the item to the left.
Right Arrow	Scroll a list right or select the item to the right.
Tab	Move Left-to-Right and Top-to-Bottom through the parts of the Console.
Shift+Tab	Move Right-to-Left and Bottom-to-Top through the parts of the Console.
F1	Display Help.
F2	Presence Status Details – including phone Busy Lamp Field (BLF), WebEx Messenger, Cisco IM&P, and Skype for Business/Lync presence.
F3	Will bring the cursor to the first Search field in the Directories pane.
Shift+F3	Clear any search results that are displayed in the active directory. **Note:** You can also clear the search results by clicking 🔍.
F4	Create a Personal Directory Group.
Shift+F4	Edit an existing Personal Directory Group.
F5	Calls In Progress Pane.
F6	Speed Dial Pane
F7	Active Calls Pane.
F8	Queued Incoming Calls Pane (All Queues).
F9	Call History Pane.
F10	Toggles availability.
F12	Contact Details.
Insert	Camp on. Used to stack a call against a busy extension.
Delete	Re-establish. Retry a call.
Page Down	Hold/Retrieve. Any call that returns to the Calls In Progress pane; for example, no reply or a parked call is retrieved in the same way.
Enter	Connect/Clear. Either connects the call or clears the call down depending on the operating transaction in process.
Shift+Enter	Blind transfer active call to dialed number or selected directory contact.
+ (plus)	Answer Next/Toggle. Answers the next highest priority call or when offering a call will toggle between calling and called parties. If a queue has Forced Delivery set then the call will move to the Active Calls pane without pressing + (plus).
- (minus)	Cancel Consult. Having offered a call, if the called party refuses, the key will drop the called party and the calling party is in circuit.
Home	Call Park. Press to park a call on a park extension number.

Table 1-1 Keyboard Shortcuts (continued)

Key Name	Description
End	Conference. Used to start the conference procedure and then add parties.
Menu key	Display the context menu for the selected section of the Cisco Unified Attendant Console Advanced interface. Use **Up Arrow** or **Down Arrow** to highlight item and press **Enter** to select.
Space Bar	Delete the number whilst in the process of dialing out.
Alt+<number>	Display directory <number>. Where <number> is a whole number in the range 0 to 9, which selects the corresponding tab.
Alt+Backspace	Reset interface to default layout.

You can perform additional functions using the **Ctrl** key in combination with other keys. These are explained in Table 1-2.

Table 1-2 Ctrl Key Functions

Key Combination	Function
Ctrl+F2	Perform a Lateral Search based on the select directory contact. This only works if enabled using **Options > Preferences > Filter Search**.
Ctrl+F4	Delete a Personal Directory Group.
Ctrl+F5	Display My Camped on Calls.
Ctrl+E	Force the queues into Emergency Mode.
Ctrl+I	Display the Login dialog box.
Ctrl+M	Send an email.
Ctrl+O	Log out of the Attendant Console.
Ctrl+Q	Mute a call when certain actions are taken, as described in Mute.
Ctrl+R	Reclaim a call.
Ctrl+T	Add a contact.
Ctrl+V or Ctrl+Insert	Use anywhere within the console, except for directory search fields, to paste a number in the Active Calls pane for outbound dialing.
Ctrl+Tab	Move from one directory tab to the next from left to right.
Ctrl+Shift+Tab	Move from one directory tab to the next from right to left.
Ctrl+(0-9, #)	Send dual-tone multi-frequency (DTMF) signals on across active calls.

The rest of this section describes:

- Logging In
- Log in using Single Sign On (SSO)
- Log in using a local account (not using Single Sign On)
- Security Policy Enforcement
- Login History
- Go Unavailable

- Interface

Logging In

After launching the application, a **Login** window will appear. If this will be the first time you log in to the console, you may need to change the user authentication method to successfully sign in.

Cisco Unified Attendant Console has two authentication methods for users, Single Sign On (SSO) and Local Accounts. The method you will use to login is determined by your system administrator.

If your system administrator has provided you with a unique login name and passphrase (later referenced as a local account), you can proceed to **Log in using a local account (not using Single Sign On)**.

If your system administrator has instructed you to sign in to the application using Single Sign On (typically the same credentials you specify to log in to your PC), you may need to change the user authentication method before proceeding to **Log in using Single Sign On (SSO)**.

To view or change the **User Authentication** method, do the following:

Step 1 Launch Cisco Unified Attendant Console Advanced.

Step 2 Select **Options > Preferences**.

Step 3 Select or clear the **Use Single Sign On** check box.

Step 4 Click **OK**.

Log in using Single Sign On (SSO)

If you are configured to use SSO, to log in:

Step 1 Press **Ctrl+I** or choose **File > Login**.

The **Login** dialog box appears.

Step 2 Type the **Login Name**, formatted as: *user_name@domain_name* (for example, test.user@company.com).

Step 3 Select **Remember my login name** if you want the login name to auto-populate the next time you log in. This setting can be changed either at the login screen or from the **Options > Preferences > Security** menu once logged in.

Step 4 Type the **Extension** number to use.

Step 5 Select **Use existing device details** if you want the extension to auto-populate the next time you log in. This setting can be changed either at the login screen or from the **Options > Preferences > Security** menu once logged in. If a new extension is required, you need to clear **Use existing device details** and enter the new extension

Step 6 Click **Login**.

Note

- If the extension number is assigned to multiple devices, after clicking Login, you are prompted to select the MAC address (a unique device identifier) belonging to the device you intend to login with. If there is any doubt regarding which device to select, contact your system administrator.
- If Cisco Unified Attendant Console Client is the first application in the current Windows login session to perform an SSO login with the provided Login Name, the SSO login screen is displayed (requiring your credentials). Otherwise, the application will automatically log in.
- If you used **Options > Preferences > Security** to remember your login name, you do not need to click **Login**; instead the log in process starts automatically when you select **File > Login.**

Log in using a local account (not using Single Sign On)

If you are not configured to use SSO, to log in to the Console:

Step 1 Press **Ctrl+I** or choose **File > Login**.

The **Login** dialog box appears.

Step 2 Type the **Login Name** and **Passphrase**.

Step 3 Select **Remember my login name** if you want the login name to auto-populate the next time you log in. This setting can be changed either at the login screen or from the **Options > Preferences > Security** menu once logged in.

Step 4 Type the **Extension** number to use.

Step 5 Select **Use existing device details** if you want the extension to auto-populate the next time you log in. This setting can be changed either at the login screen or from the **Options > Preferences > Security** menu once logged in.

If a new extension is required, you need to clear **Use existing device details** and enter the new extension.

Step 6 Click **Login**.

Note

- If the extension number is assigned to multiple devices, after clicking Login, you are prompted to select the MAC address (a unique device identifier) belonging to the device you intend to login with. If there is any doubt regarding which device to select, contact your system administrator.

Security Policy Enforcement

To provide system security, your system administrator may configure passphrase life-cycles and an idle user automatic logout timer.

Idle User - Automatic Logout

If you are logged in but do not use the console for longer than the duration set by your system administrator, the Cisco Unified Attendant Console Advanced server will log you out of the console.

Passphrase Security

Passphrase Change Requests

Your system administrator may force you to change your passphrase at timed intervals or at their discretion. The requirement to change the passphrase will be presented at login.

To change your passphrase, do the following:

Step 1 Use any of the following options to open the Passphrase Change window:

  - Opt to change the passphrase when prompted at login.
  - Press **Ctrl+P**.
  - Click **File**, and then select **Change Passphrase**. Proceed from the change request window.

Step 2 Type the **Old Passphrase**.

Step 3 Type the **New Passphrase**.

Step 4 Retype the **New Passphrase** in the **Confirm Passphrase** field.

Note There is a password strength meter in the window. Requirements for passphrases are defined by your system administrator. Requirements can be defined as length, character type, character case, existence within a dictionary, and prior use.

Step 5 Click **Change Passphrase**.

If your account is locked out you will need to contact your system administrator for assistance.

Actions that may result in your account being locked out include:

- *Ignoring Passphrase change requests*

  You may be required to change your passphrase at set intervals. Prior to the passphrase expiry, you will receive a notification about the required change and the allotted time for the change.

  If you do not change your passphrase after the first notification, the system will prompt you at each subsequent log in. If you fail to change your password within the defined period of time, the account will be locked out.

- *Exceeding the configured number of failed login attempts*

  Multiple unsuccessful login attempts within a set period of time will lock your account.

- *Not using your account for more than a specific number of days*

  If your account is inactive for longer than a predefined number of days, it will be locked out.

Login History

After successfully logging in to the console, you can obtain the following login details from the last successful and unsuccessful login:

  - Date and time
  - Extension
  - Machine IP Address
  - Failed attempts since last login

To view the Login History, click **File > Login History**.

To close the Login History, click **OK**.

Go Unavailable

You can take a break by *going unavailable*. Calls will still appear on the Console but you will not be able to answer them unless they ring on your device. If you go unavailable, any call you have extended that times-out will appear on another Attendant Console in the Calls In Progress pane. If a queue is set to *Forced Delivery* (for more information see **Forced Delivery, page 1-12**) the calls on it are not delivered directly to the user handset, but wait in the system to be routed or overflowed. If configured by your system administration, the system will route calls to an alternate destination if no user is available.

To go unavailable press **F10**, and then, in the **Go Unavailable** confirmation message box, click **Yes**.

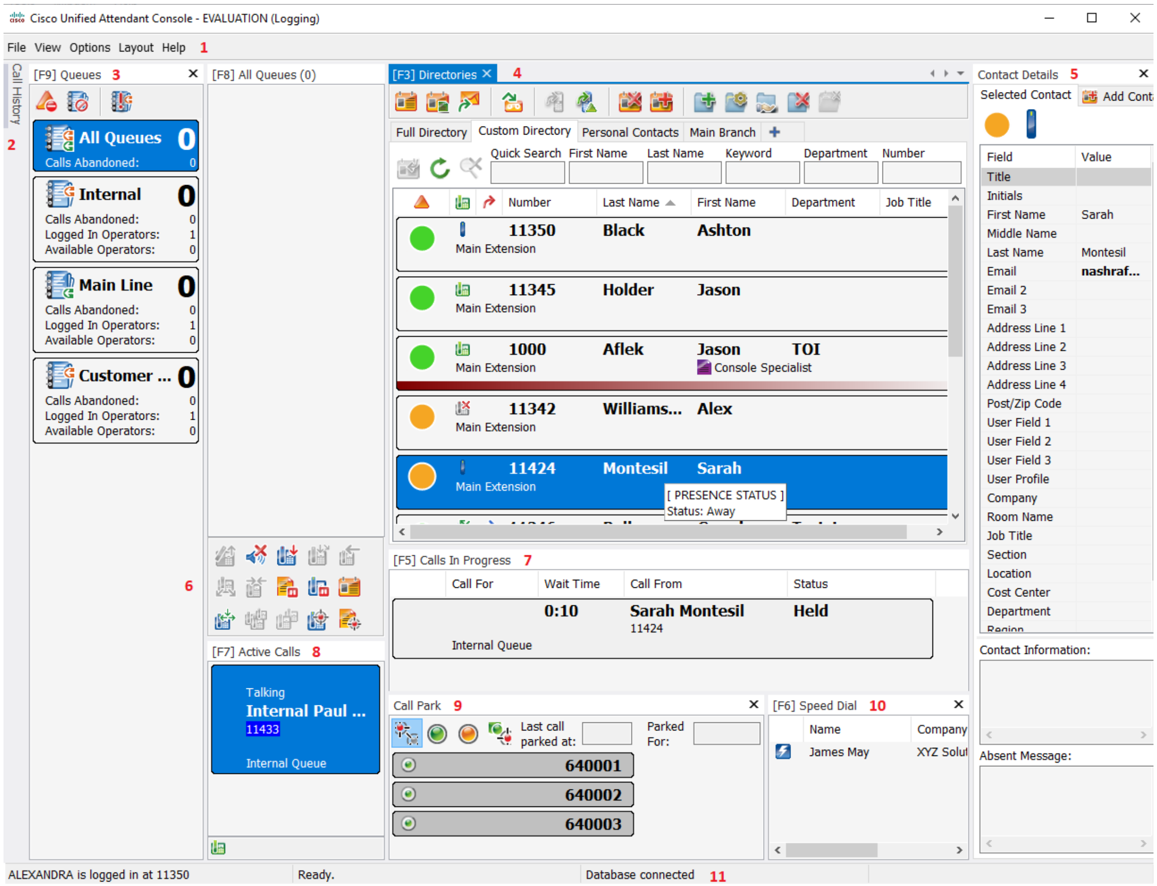
To become available again, press **F10**.

You can also configure Cisco Unified Attendant Console Advanced so that you go unavailable automatically when your computer has been idle for a certain amount of time. For details of how to do this, see **Auto Unavailable, page 2-5**.

Note If your system administrator configures an automatic logout due to idle time, it will take precedence over the Auto Unavailable duration if the automatic logout duration is shorter that the auto unavailable duration.

Interface

The Cisco Unified Attendant Console Advanced client interface consists of several parts.


Cisco Unified Attendant Console - EVALUATION (Logging)
File View Options Layout Help 1
Call History
2
[F9] Queues 3
All Queues 0
Internal 0
Main Line 0
Customer ... 0
Calls Abandoned:
Logged In Operators:
Available Operators:
[F8] All Queues (0)
[F3] Directories 4
Full Directory
Custom Directory
Personal Contacts
Main Branch
Quick Search
First Name
Last Name
Keyword
Department
Number
Job Title
11350 Black Ashton
11345 Holder Jason
1000 Aflek Jason TOI
Console Specialist
11342 Williams... Alex
11424 Montesil Sarah
Main Extension
[PRESENCE STATUS]
Status: Away
Contact Details 5
Selected Contact
Add Cont
Field
Value
Title
Initials
First Name Sarah
Middle Name
Last Name Montesil
Email nashraf...
Email 2
Email 3
Address Line 1
Address Line 2
Address Line 3
Address Line 4
Post/Zip Code
User Field 1
User Field 2
User Field 3
User Profile
Company
Room Name
Job Title
Section
Location
Cost Center
Department
Region
Contact Information:
Absent Message:
6
[F5] Calls In Progress 7
Call For
Wait Time
Call From
Status
0:10 Sarah Montesil Held
11424
Internal Queue
[F7] Active Calls 8
Talking
Internal Paul ...
11433
Internal Queue
Call Park 9
Last call parked at:
Parked For:
640001
640002
640003
[F6] Speed Dial 10
Name
Company
James May
XYZ Solut
ALEXANDRA is logged in at 11350
Ready.
Database connected 11

Key to Figure:

1. Menu Bar
2. Call History Pane
3. Queued Incoming Calls Pane
4. Directories Pane
5. Contact Details Pane
6. Call Control Toolbar
7. Calls In Progress Pane
8. Active Calls Pane
9. Parked Calls Pane
10. Speed Dial Pane
11. Status Bar

Menu Bar

Note Depending on the role assigned to your login, the following **View** menu options may not be visible: Directories, Contact Details pane, Speed Dial, Call Park. For more information, see the *Cisco Unified Attendant Console Advanced Administration and Installation Guide*.

Table 1-3 describes the Menu Bar.

Table 1-3 Menu Options

Control Name	Description
File	
Login	Log in to Cisco Unified Attendant Console Advanced.
Logout	Log out from Cisco Unified Attendant Console Advanced.
Change Passphrase	Change your passphrase.
Login History	View details of the last successful and unsuccessful attempts at logging in using the current login name.
Exit	Close the application.
View	
Toolbars	Show/hide the following toolbars: • **Queues**. Queues. For more information, see Queues Pane. • **Call Control**. For more information, see Call Control Toolbar. • **Directories**. For more information, see Directories Pane.
Queues	Choose **View All Queues** or **View Individual Queues** or both. For queue statistics, choose **View Queue Statistics**.
Directories	Show/Hide the Directory pane (if available to role).
Contact Sidebar	Show/Hide the Contact Sidebar pane.
Speed Dial	Show/hide the Speed Dial pane.
Call Park	Show/hide the Parked Calls pane.
Call History	Show/hide the Call History pane.
Display Salutation	Show/hide the Salutation Window.
Display My Camped on Calls	Show/hide the display of camped on calls. The shortcut for this function is (**Ctrl+F5**).
Options	
Preferences	Open the preferences window to customize Cisco Unified Attendant Console Advanced.
Emergency	Set all queues to Emergency Mode. All calls will be forwarded to a preconfigured destination (set by your system administrator).
Filter Searching	Activate AND searching.
Font Size	Change the font size displayed in the interface.

Table 1-3 Menu Options

Control Name	Description
Layout	
Single Window	Select this to disable the undocking, moving and docking of interface components (if available to role).
Reset Current Layout	Reset interface to default layout.
Help	
Contents	Display help.
Keyword Search	Use keywords to search the help file.
Collect Logs	Collect your activity logs into an archive ZIP file, and use it to check and troubleshoot the application.
About Attendant Console	Display Cisco Unified Attendant Console Advanced version and copyright.

Call History Pane

The Call History pane lists all the calls made or received by the operator, thereby enabling them to spot any they may have missed or forgotten and then respond accordingly. By default, up to 100 calls are logged, with the most recent at the top of the list.

Administrators can configure the pane to display any maximum number of logged calls in the range 3 to 500. The records logged in the Call History pane are saved to the database when you log out, and are available when you log back in

The following calls are not logged in the Call History:

- Held, parked or retrieved call stages
- Conference call stages

If the system crashes during a call, the record will contain no information about whether or how the call completed.

The Call History pane appears when you move the pointer to the **Call History** control near the top of the left edge of the Console interface. While the pointer is over the pane it stays visible, but it is automatically hidden when you move the pointer away. If your login has the VIOC role, the Call History pane is always displayed, and you cannot hide it.

Users with any of the other roles can also display or close the Call History pane by selecting or clearing the **View > Call History** checkbox as appropriate. You can pin the Call History pane anywhere in the interface, in the same way as the other panes; and users with roles that enable them to use the multi-window layout feature can also place it on the desktop.

When you are connected to the Subscriber after a failover, the call history will not be saved until you resume using the Publisher. However, supervisors can set up a file on the your computer where the call history is stored locally and at all times when CUACA is using the Subscriber server.

Display format

Table 1-4 describes the display format.

Table 1-4 Display format

Legend	
Icon	The call type/connection status. Arrow colour: green = connected, red = not connected, amber = unknown state. Arrow direction: down = inbound, up = outbound, diagonal = transferred. ↓ Incoming connected ↑ Outgoing connected ↗ Blind transferred connected ↑ Incoming not connected ↓ Outgoing not connected ↗ Blind transferred not connected ↓ Incoming unknown state ↑ Outgoing unknown state ↗ Blind transferred unknown state **Notes** • Only transfers that use a service queue are listed. Define which transfers these are using **Options > Preferences > Advanced**. • Consult transfers are shown as outbound calls. • If the system crashes during a call, there will be no record of whether or how the call completed; so the call history shows the call in the unknown state.
Time_(Count) Date	The time the call started. If the call did not occur today, its date is also shown. If a number is shown in parentheses after the time, this is how many times you have subsequently tried to do the same thing to the call using the same number with the same result on the same day.
First_Name Last_Name	The name of the other person involved in the call.
Number	The call origin or destination, depending on the call direction. The colour of the background against which the number is displayed shows the type of call: blue = internal outbound, red = external inbound, green = external outbound. The same colour scheme is shown in the F7 and F8 panes. Mouse over the number to display the call routing tag from the queue.
Company_Name	Displayed if available.

Using the Call History pane

If you right-click a call in call history, a menu appears, listing what you can do with it:

- Call
- Consult Transfer
- Blind Transfer
- Start Conference
- Contact Details
- Clear History - removes entire history from the screen and database.

Which actions are possible depends on the type of call recorded and what you are currently doing: unusable actions are dimmed.

Calling numbers in logged calls

For you to be able to dial a number in a logged call, it must consist of numeric digits. If it reads Unknown Number (or equivalent) you will not be able to call it.

To call a number in the call history pane, do one of the following:

- Right-click the call record, and then select **Call**.
- Use the keyboard to move to the call record (for example, use the **Ctrl+A** shortcut), and then press **Enter**; when you move to the Call History pane, the most recent call is automatically selected.
- Double-click the call record.

Transferring to numbers in logged calls

If a call is in progress, you can transfer it to the number in a logged call by one of the following:

- Click the call record. The transfer type (blind or consult) will be whatever is currently configured.
- Use the keyboard to select the call record, and then press **Enter**.
- Right-click the call record, and then select the required transfer type from the menu.

Queues Pane

The Queues pane (press **F9** to view) displays the queues associated with the login name. An icon (see Table 1-5) is displayed for each queue.

You can show/hide the toolbar at the top of the Queues pane by clicking **View > Toolbars > Queues**. Options include **View All Queues**, **View Individual Queues**, or no selection, which hides the Queues pane. To display queue statistics (numbers of Calls Abandoned, Logged In Users and Available Users), choose **View > Queues > View Queue Statistics**. Queue statistics are reset at midnight.

When an incoming call is delivered to the queue, the number of calls waiting to be answered is displayed.

Queues are configured by your system administrator to be either one of the following:

- **Forced Delivery**

  Queue calls are automatically distributed to logged-in and available users in a round-robin fashion. Users do not need to request the call using the mouse or keyboard short cut.

- **Broadcast Delivery**

  Queue calls remain in queue and are displayed to all logged-in users. Users must use the Answer Next keyboard shortcut or mouse to retrieve a call from queue. See Answering Calls for further details.

Table 1-5 describes the icons that are displayed in the Queues pane.

Table 1-5 Queues Pane Icons

Icons	Description
⛔	Go unavailable (F10)
🚫	Go queue unavailable (Ctrl+F10)
❗	Emergency calls (Ctrl+E)
	Forced Delivery queue. See **Forced Delivery, page 1-12** for details.
	Broadcast Delivery queue. See **Broadcast Delivery, page 1-13** for details.
	All queues (the total number of waiting calls in all available queues)
❌	Forced delivery queue in Emergency mode
❌	Broadcast delivery queue in Emergency mode
❌	All queues in Emergency mode
🕒	Queue in night service

Right-click the Queues pane to either:

- Select emergency queues (pressing **Ctrl+E** also displays the **Emergency** dialog box). See Forwarding Queues to Emergency Mode Destination for further details.
- **View Queue Statistics** (or choose **View > Queues > View Queue Statistics**). This is a toggle: clicking alternately turns it on and off.

Queued Incoming Calls Pane

The Queued Incoming Calls pane (press **F8** to view) displays calls waiting in queues, plus the following information:

- Name of the caller
- Number (CLI) of the caller
- Elapsed time the call has been waiting in queue
- Name of the queue (optional)
- Color bar (if Queue Call Colors have been configured for the queue, as described in Queued Calls)

Directories Pane

There are two types of directories in Cisco Unified Attendant Console Advanced:

- **Full Directory**: displayed by default. It contains all corporate contacts (if configured by your system administrator) and any manually-created contacts.
- **Personal Directory Groups**: directories created and managed by users. These directories can be kept private or shared with selected users. Each user may create up to 100 Personal Directory Groups. To learn how to create, manage, populate, share, and delete Personal Directory Groups, see Personal Directory Groups.

Configure the Directories pane using **Options > Preferences** (for more information, see Directory).

You can show/hide the toolbar above the directory tabs using **View > Toolbars > Directories**.

Table 1-6 describes the controls that are available in the Directories toolbar.

Table 1-6 Directories Toolbar Icons

Icons	Description
	Contact Details
	Contact Notes
	Send Email
	Transfer to Voicemail
	View Alternate Numbers
	View Alternate Numbers with Presence
	Delete Contact (Ctrl+D)
	Add Contact (Ctrl+T)
	New Personal Directory Group

Table 1-6 Directories Toolbar Icons

Icons	Description
⚙	Personal Directory Group Details
📁	Personal Directory Group Sharing (Ctrl+H)
✗	Delete Personal Directory Group
✗	Remove Contact from Personal Directory Group

Default Directories View

The following columns are displayed in the Directories pane by default:

- Presence status ▲. See Table 1-7.
- Main extension status ☎. See Table 1-7.
- Notes 📝. See Table 1-7.
- Assistant, alternate contacts or additional contact numbers ↷. See Table 1-7.
- Number
- Last Name
- First Name
- Department
- Job Title

You can resize the directories by dragging their header borders.

Table 1-7 describes the Directories pane columns headed by icons.

Table 1-7 Icons in Directories

Column Heading	Description
▲	Contact presence status. For details of the icons in this column, see Table 5-2.
☎	Contact Main Extension status. For details of the icons in this column, see Table 5-1. If the number presented in the directory is not a Main Extension number, the type of contact number is represented in this column using the following icons: • 📱 (mobile) • ☎ (business) • ☎ (home) • 📠 (fax) • 📟 (pager)

Table 1-7 Icons in Directories

Column Heading	Description
📝	The contact has notes attached. If you hover the mouse over a contact note, the note's content will be displayed in a tool tip.
↪	Assistant, Alternate Contacts or additional Contact Numbers. • ↪ = The contact has an Assistant added to their Alternate Numbers. This icon takes precedence over the Alternate Contacts ↪ and additional Contact Numbers ↪ icons. For more information, see Detailed Contact Phone Status, Presence Status and Alternate Contacts. • ↪ = The contact has one or more Alternate Contacts (but no Assistant) added to their Alternate Numbers. This icon takes precedence over the additional Contact Numbers ↪ icon. • ↪ = The contact has two or more of the following additional Contact Numbers: – Mobile – Business 1 – Business 2 – Home – Pager – Fax This icon does not display if the contact has an Assistant or any Alternate Contacts.

Table 1-8 describes the keyboard shortcuts you can use within the Directories pane.

Table 1-8 Keyboard Shortcuts Used in Directories

Key	Function
Up Arrow	Move towards the top of the list.
Down Arrow	Move towards the bottom of the list.
Left Arrow	Scroll the list left or select the item to the left.
Right Arrow	Scroll the list right or select the item to the right.
Page Down	Hold/retrieve the selected call.
Enter	Call selected number/End active call/Retrieve selected held call.
Tab	Move Left-to-Right and Top-to-Bottom through the parts of the Console.
Shift+Tab	Move Right-to-Left and Bottom-to-Top through the parts of the Console.
F2	Displays Presence Status and Alternative Contact details.
F4	Create a Personal Directory Group.
F12	Open Contact Details.
Shift+F3	Clear any search results that are displayed in the active directory. **Note:** You can also clear the search results by clicking .
Shift+F4	Edit an existing Personal Directory Group.
Ctrl+F2	Perform a *lateral search* - automatically filter the contact list to display only those contacts that match the selected one in a specific field. For more information, see Lateral Searching.
Ctrl+F4	Delete a Personal Directory Group.
Ctrl+Tab and Ctrl+Shift+Tab	Either select the next or previous directory tab and display the contact details.
Alt+<number>, where <number> is an integer in the range 0 to 9	Display a specific directory. You can use this method to view the first 10 directory tabs only. For example, If you have five directories and you press **Alt+2** the second directory tab is displayed.

Contact Details Pane

When a contact is selected, the Contact Details pane shows additional information about them.

This information includes:

- Presence icons
- Contact Information and Absent Messages panes. These can be vertically expanded or reduced as required. They are read-only. Entering information in these panes is described in Adding, Modifying and Removing Absent Message and Contact Information.

You can configure the pane using **Options > Preference > Contact Sidebar**. You can hide the pane by deselecting **Display Contact Sidebar**.

Although the contents of the pane and notes are read-only, certain fields can be used to initiate an action. For example, if any of the following phone number fields are bold, you can start a call by double-clicking any of them:

- Main Extension
- Home
- Business1
- Business2
- Pager
- Fax
- Mobile

If you press **Enter** or double-click with the pane selected, one of the following happens:

- If there is no current call, pressing Enter dials the number.
- If there is a connected call, pressing Enter starts a consult transfer.
- Double-clicking either consults the call or blind transfers the call based on the settings under **Options > Preferences > Call Transfers > When dragging and dropping or double-clicking**.

Details can appear in bold in the following fields (emails):

- Email
- Email2
- Email3
- UserField1
- UserField2
- UserField3
- UserProfile

Bold signifies that you can initiate an email by double-clicking the required field. You can also click **Enter** if the pane is selected. This opens the configured email client (for example, Outlook) to compose a new email message.

Note The Console does not verify the email address. It assumes that if an @ character appears within the field, then the data is an email address and the field appears as bold.

You can create new contacts in the Contact Details pane using the **Add Contact** tab, as described in Adding Contacts to Directories.

Call Control Toolbar

Depending on your assigned role, you can show/hide the Call Control toolbar using **View > Toolbars > Call Control**.

The Call Control toolbar contains call controls. Which ones are active and usable depends on the call control operation currently being performed, for example:

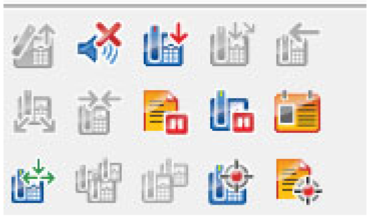


Table 1-9 describes the controls.

Table 1-9 Call Control toolbar

Control Name	Icon	Description
Answer Call		Answer a ringing call in the Active Calls pane (not a queued call).
Mute Call		Mute a call. This will put the call on hold locally (on the handset) and the caller will hear your music on hold.
Clear Call		Clear an active call.
Transfer Call		Complete a pending consultation transfer.
Retrieve Call		Retrieve a held call.
Toggle Call		Switch between Active and Held calls.
Re-establish		Redo an action previously performed on a call.
Hold with Notes		Attach notes to the current call before placing the call on hold. The notes are for your use, and do not get sent on with the call.
Hold		Place a specific call on hold.
Contact Properties		View the caller's contact details.
Start Conference		Consult and start conference with another user.
Conference		Bring the parties together in a conference.

Table 1-9 Call Control toolbar (continued)

Control Name	Icon	Description
Camp on	☎	Transfer a call to a busy extension.
Park Call	☎	Park the call.

You can right-click a call in the Active Calls pane and then choose a menu option to perform these controls, or you can use keyboard shortcuts (see Using the Keyboard).

Calls In Progress Pane

The Calls In Progress pane (press **F5** to view) displays:

- Calls that have been placed on hold, which will return on time out
- Calls that have returned on no reply time out from being either:
  - Parked
  - Transferred to an extension

The timers for returns are set up by your system administrator.

You can retrieve or re-establish a call from the Calls In Progress pane in the following ways:

- Select a contact in the directory and then click one of the tools described in Contact Details Pane.
- Right-click a call and choose a menu option.
- Use the keyboard shortcuts described in Using the Keyboard.

The Calls In Progress pane contains the following information.

- **Call For** - The intended recipient of the call.
- **Wait Time** - The caller's approximate waiting time.
- **Call From** - The number from which the call was transferred.
- **Status** - Whether the call has been placed on hold, parked on a busy extension or if the call has been returned on time-out displayed as Hold Timeout, Park Timeout, No Reply.
- 📝 - You (or another user) have attached notes to the call. Hover over the call to view them.
- A colored bar matching that of the queue assignment (if Queue Call Colors have been configured for the queue, as described in Queued Calls)

Active Calls Pane

The Active Calls pane (press **F7** to view) displays calls that are being processed. The call information displayed includes:

- Name of the queue
- Current status of the call: Held, Calling, Talking or Busy
- A colored bar matching that of the queue assignment (if Queue Call Colors have been configured for the queue, as described in Queued Calls)

Table 1-10 describes the keys that you can use in the Active Calls pane.

Table 1-10 Keys in the Active Calls Pane

Key	**Function**
Up Arrow	Move up through the list of calls.
Down Arrow	Move down through the list of calls.
Enter	Answer incoming ringing call/Clear connected call/Complete Consult Transfer.
Page down	Hold/Retrieve the held call.
Insert	Camp on call.
Ctrl+F5	Display My Camped on Calls.
Plus (+)	Answer call with the next highest priority. This is not required if a queue has been configured as Forced Delivery. The caller will be immediately connected.
Minus (-)	Cancel Consult Transfer.
End	Start and join all parties in Conference.
Delete	Re-establish a call.
F2	Display Presence Status and Alternative Contact details.
Ctrl+F2	Display the Lateral Search (Cross tab) within the directories. This requires enabling in Preferences.
F12	Contact Details/Add a contact.
Home	Park the answered call on a device.
Ctrl+M	Send an email to an extension user not responding to a call.
Ctrl+Q	Mute a call when certain actions are taken, as described in Mute.
Ctrl+V or Ctrl+Insert	Paste a number in the Active Calls pane for outbound dialing.

You can also access these options by right-clicking on a call in the Active Calls pane and using the menu.

Parked Calls Pane

The Parked Calls pane displays a list of call park devices (virtual devices where calls can be held temporarily and picked from any other call center extension) and their extension numbers. When a call is parked, the device display also includes:

- **Call for**—the name and extension number of the contact the call is for
- **Call from**—the name (if available) and number making the call
- **Parked by**—the name of the user who parked the call, if applicable
- **Routing tag**—information about the queue on which the call was received

You can hide or display the Parked Calls pane by choosing **View > Call Park**. By default, you view all devices.

Table 1-11 describes the controls in the Parked Calls pane.

Table 1-11 Controls in the Parked Calls Pane

Control	Function
	Show all Call Park devices.
🟢	Show all Call Park devices available to you. Unused devices are listed with this symbol.
🟠	Show only those Call Park devices where you have parked calls. Devices with calls parked by you are listed with this symbol.
	Show only those Call Park devices where other users have parked their calls. Devices with calls parked by others are listed with this symbol.

The following information is also displayed:

- **Last call parked at**—the number where you parked the last call
- **Parked For**—when a call is reverted from a busy extension and you park that call, this is the name of the contact the call returned from

A Call Park device with **Out of Service** icon indicates that it is out of service and cannot be used for parking calls. For more information, see Parking Calls and Retrieving Parked Calls.

Speed Dial Pane

The Speed Dial pane (press **F6** to view) contains a list of your frequently-dialed contacts, enabling you to dial them quickly. For each contact in the Speed Dial pane, the following information is displayed:

- Full **Name**
- **Company**
- Phone **Number**

You can perform call control operations on the contacts by:

- Selecting a contact and then clicking any tool in the Contact Details Pane.
- Using the keyboard shortcuts described in Using the Keyboard.

Status Bar

The status bar is an information pane at the bottom of the Cisco Unified Attendant Console window; it is divided into sections, each of which shows information about the current state of an aspect of the application. From left to right, the sections show:

- <Login Name> is logged in at <Extension>
- Application Status. For example, **Ready.**
- Database Connection

If you lose connection to the Publisher Cisco Unified Attendant Console Server, one of the following things will happen:

You will be logged out of the console.

- The following error message is displayed: *You are unable to login because a server cannot be located*. Click **OK** to close the prompt.
- You will be unable to log in to the console until your system administrator restores service to the Cisco Unified Attendant Console Server.

You will connect to the Subscriber Cisco Unified Attendant Console Server.

- An exclamation mark icon will appear to the left of the **Login Name** and **Database Connection**. The icon will remain there until you reconnect to the primary server. If you hover over the icon, a message will appear: *You are connected to server "subscriber server name" which is your subscriber server*. Click the **X** to close the alert.
- While connected to the subscriber server, you will be unable to store preference changes, create or modify Personal Directory Groups or Speed dials, create or modify contacts.
- When the Publisher Cisco Unified Attendant Console Server becomes available, you will receive a prompt: *Your Publisher server "publisher server name" has come back online. Do you want to reconnect*? Click **Yes** to reconnect or **No** to stay connected to the subscriber server.
- Optionally, at **Options > Preferences > Display> Resilience**, you can disable the prompt, so that you automatically reconnect to your publisher when it becomes available. This option is hidden if you don't have a Subscriber server.

CHAPTER 2

Customizing Cisco Unified Attendant Console Advanced

This section describes the following:

- Roles
- Controlling how panes are displayed
- Controlling application functionality

Depending on the role assigned to your login, you can customize both the appearance and functionality of the Cisco Unified Attendant Console so that you can work with it in the most comfortable and efficient way. Any custom settings you make are stored on the server. In doing so, your settings will follow your login name to any console you log in to. You can only change the settings if you:

- are connected to the Publisher server - you cannot change them when connected to the Subscriber,
- have a connection to the database.

Roles

Each Console user is assigned a role when their login is created by their system administrator. Roles define which of the following parts of the Console interface are available to a user and whether the user can hide or move them:

- Call History pane
- Queues pane
- Queued Incoming Calls pane
- Directories pane
- Contact Details pane
- Call Control toolbar
- Calls in Progress pane
- Active Calls pane
- Parked Calls pane
- Speed Dials pane
- Status bar

For descriptions of the positions and functions of these parts, see Interface.

Each user login is assigned one of these predefined roles:

- FULL
- VIOC

The roles control the following for each part of the interface listed above:

- Whether it is present in the interface.
- If present in the interface, whether users can hide it.

No role allows users to hide the Queues pane, Active Calls pane or Calls in Progress pane.

- Whether users can detach (undock) it from the interface, move it, and reattach (dock) it to the interface.

No role allows users to do these things to the Queues pane, the Active Calls pane, or the toolbars. The VIOC role does not allow users to do these things to any part of the interface.

For details of what the predefined roles allow and how they are assigned to users, see the *Cisco Unified Attendant Console Advanced Administration and Installation Guide*.

If the user has been assigned a role that allows them to undock at least one pane, the Layout menu contains the **Single Window Layout** option. When this option is selected, panes cannot be undocked; with it cleared panes can be undocked. When users close the application, the interface layouts (both single-window mode, and multi-window mode) are saved separately for reuse later.

Controlling how panes are displayed

Depending on whether your role allows it, you can hide or display the following panes, controls and information using **View** menu options:

- Queues pane
- Directories pane
- Contact Details pane
- Speed Dial pane
- Call Park pane
- Queues toolbar
- Directories toolbar
- Call Control toolbar (if displayed)
- Queues statistics

You can also hide any of the panes by clicking the **x** in the title bar.

You can resize and move all the panes within and attached to the interface (docked) or outside the interface (undocked), except for the following:

- Queued Calls - you can resize this pane by dragging the top edge of the Active Calls pane.
- Call Control Toolbar
- Active Calls - you can resize this pane by dragging its top edge

Information about the panes on display, their positions and relative sizes is stored by the application between sessions so that when you next start it, the interface looks the same as when you last exited it.

Note The Console runs either in or out of **Single Window** mode. In Single Window mode, all the panes are in fixed locations within the interface, and cannot be moved. When not in Single Window mode, the panes within the interface can be moved to anywhere within the interface (docked) or on the desktop (undocked).

Resizing panes

To resize a pane, simply click any edge or corner (you can grab a corner only if the pane is undocked), drag to stretch the pane, and then release the mouse button to fix the pane at that size. You cannot shrink a pane to show less than one row of information.

Moving panes

To move a pane:

Step 1 Deselect **Layout > Single Window**. With this menu option selected, the panes are confined within the application interface.

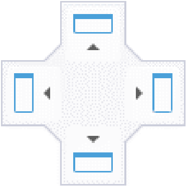
Step 2 Move the cursor over the title bar of the pane to move.

Step 3 Click and hold. The pane title bar is highlighted.

Step 4 While holding the mouse button, drag the pane to where you want it.

While you are dragging the pane, a set of controls are displayed within the interface:

- An arrow control is displayed next to each edge of the interface (for example, ▯◂ is displayed by the left edge). Use this to position the pane along that edge.
- When the cursor is dragged over another pane, a set of controls is also displayed in the middle of that pane:



Use these to place the dragged pane relative to the one it is over.

Step 5 Still holding the mouse button (and dragging the pane), point to the relevant control.

The position in which the pane will be placed within the interface is highlighted; the other panes will be automatically adjusted to make room for it.

If you do not point to a control, there is no highlight, and the pane is left undocked on the desktop. If you minimize the interface, undocked panes disappear until you maximize the interface again.

Step 6 Release the mouse button. The pane is placed where specified.

Note Any pane undocked from the main window always floats on top of the main window.

Be careful when moving panes because you may hide parts of the interface that show when a call is incoming. We recommend that you do not overlay panes on top of each other.

Resetting the interface layout

Whether or not you are working in Single Window mode, you can reset the interface back to its default layout - with all panes docked - by clicking **Layout > Reset Current Layout**. If you have multiple monitors, resetting the layout also moves the interface back to your main monitor. Alternatively, press **Alt+Backspace**. This can be very useful if you have undocked panes on a multi-monitor system.

Resetting the application does not change the window mode.

Controlling application functionality

To access the Console settings, select **Options > Preferences** in the main menu. This opens the **Preferences** window.

Note Some options may be unavailable to certain users, as they depend on permissions being individually assigned by the Administrator or Supervisor.

The following options are available:

- General
- Display
- Presence
- Dialing
- Call Transfers
- Call Park
- Mute
- Tones
- Queued Calls
- Directory
- Personal Directory Groups
- Contact Sidebar
- Alternate Numbers
- Field Headers
- Secondary Sort
- Filter Search
- Security
- Logging
- Advanced

General

The following settings are available in this tab:

- **Popup Application When**

  Cisco Unified Attendant Console Advanced provides you the options to pop-up the application when:

  - **Queued calls are waiting to be answered**
  - **My local device rings** (if this is the device you are logged in with)
  - **Minimize when not in use**

  If either or both of the first two options are checked, the application will pop-up on your desktop if it is minimized. The third option will minimize the application when there are no calls active or queuing.

- **Auto Unavailable**

  Define how many minutes your computer must be idle before Cisco Unified Attendant Console Advanced automatically sets your mode to *user unavailable*. Select **Make me "unavailable" when my computer has been idle for this time period**, and then choose from **5**, **10**, **15** or **30 minutes**, or **1 hour**.

Note If your system administrator has set an auto-timeout value for idle sessions that is shorter than your Auto Unavailable duration, it will take precedence.

- **Internal Contacts Number Priority**

  This list shows the order in which an internal contact's number type is chosen to populate the Number field. If the contact does not have a number of the type at the top of the list, the next number type is used, and so-on.

  You can re-order the list by selecting the number type and then moving it with the up arrow and down arrow controls.

- **External Contacts Number Priority**

  This list shows the order in which an external contact's number type is chosen to populate the Number field. If the contact does not have a number of the type at the top of the list, the next number type is used, and so-on.

  You can re-order the list by selecting the number type and then moving it with the up arrow and down arrow controls.

Display

The **Display** tab enables you to set the following:

- **Queues Order** – if you do not want the queues sorted in the order they were created, check **Sort queues alphabetically**.
- **When a section becomes selected** – select **Change font Colour** to change the font colors of the labels in Cisco Unified Attendant Console Advanced for the selected pane **To this colour**. This makes it easy to see which pane you have selected when operating the Console. Click **Colour** to access the color palette, where you choose the color you want to use. The default is red.

- **Display Call Information**
  - **Show Routing Tag** enables you to display the name of the queue for each call as well as the standard details. This is set by default.
  - **Show Time-out Conditions** enables you to display details of why a call has returned to the Console.
- **When a call is selected** – controls whether to display call park devices related to the user via directory groups.

  Checking the option **Display Park Devices Relating To Call** will cause the following behavior:
  - When no calls are selected. all park devices will be displayed.
  - When a call is selected, only the park devices relating to the queue that the call arrived on will be displayed.
  - No park devices will be displayed if there are no related park devices.

  If the **Display Park Devices Relating To Call** option is unchecked, all park devices will be displayed regardless of whether or not a call is selected.
- **When making calls** – controls whether the Presence prompt is displayed. If the Busy Lamp Field (BLF) or default Presence source status reflects anything other than on-hook and Available, the prompt will be displayed. By default, **Prompt if Presence Status is set** is not selected.
- **When dragging and dropping** – the **Display a drag image** option enables you to see a complete image on screen of the call you are dragging across the screen.
- **Font Size** – use to change the size of the font in the Cisco Unified Attendant Console Advanced interface to help make it easier to use. Select from **Default**, **Medium**, **Large** or **Extra Large**. You can also set this parameter from the main application menu by choosing **Options > Font Size**.
- **Enhanced Coloured Notes**. Selecting **Highlight entire row with notes colour** changes the characteristics of the Directory pane, so that if a note is applied to a contact, the selected colour of that note is reflected in a ribbon across the bottom of that contact's entry in the directory and in the background colour of the Contact Details pane if notes are displayed.
- **Resilience** – *Only displayed on resilient installations.* Check **Prompt when switching servers** (the default) to be prompted when servers switch during server failure or recovery (see Status Bar for more information).

Presence

This tab enables you to configure what Presence and BLF information is displayed.

- **Phone** – select **Enable Busy Lamp Field Status** (the default) to show Busy Lamp Field (BLF) phone status symbols in the Directories and Call In Progress panes. Clear **Enable Busy Lamp Status** to disable Cisco Unified Attendant Console Advanced BLF-dependent features.
- **Contact** – select **Enable Status** to display the Presence Status icon (Cisco IM&P, WebEx Messenger, or Skype for Business Presence), if configured by your system administrator.

Dialing

The following options are available in this tab:

- **Voicemail** – in **Voicemail prefix** enter a prefix that will send the call directly to an extension's voicemail when you right-click a contact and choose **Transfer to Voicemail**.
- **Auto Dial** – Select this to automatically dial an internal or external number after a delay (from 0 to 10 seconds) you define using the **Auto Dial Delay** control.

Call Transfers

The following options are available in this tab:

- **When Dragging and Dropping or Double Clicking**

  Choose the type of transfer to perform when dragging and dropping or double-clicking a call:

  - **Perform consultation transfer**
  - **Perform blind transfer** (this is selected by default)
- **When Blind Transferring**

  When Blind Transferring a call, you can select **Automatically Campon if busy**. Campon is a feature that enables a user to "camp" a call on an internal contact's extension if it responds with the busy tone (will not work with extensions that have voicemail). While camped on, the server repeatedly sends inquiry calls to the line until it becomes available. Once the line becomes available the transfer is completed.

  Campon is a feature that must be enabled by your system administrator.
- **When Re-establishing a Call**

  When re-establishing a call, you can select **Automatically Campon if busy**. Campon is described under When Blind Transferring.

Call Park

Under **After a call has been parked**, select **Show all park devices** to display all the park devices in the Parked Calls pane.

Mute

This tab enables you to **Automatically Mute Calls When**:

- **Performing a search** – select this to mute when you click in any of the search fields.
- **Pressing numeric keys to dial numbers** – select this to mute when you dial a number.
- **Changing or selecting Directory screens** – select this to mute when you select a directory.

With any of these selected the call is held locally (on the handset) and the caller hears music on hold.

Tones

This tab enables you to switch tones on or off depending on specific events:

- **When I have made myself unavailable** – Select **Do not play any tones** to prevent tones playing while you are away from the Console.
- **When a queued call is waiting to be answered** – Select **Play a Ring Tone** to play a ring tone while a call is waiting in a queue.
- **When a call has timed out** – Select **Play a Ring Tone** to play a ring tone when a call reverts from the Calls In Progress or Parked Calls panes.

Queued Calls

This tab enables you to color-code calls to show which queue they arrived on (for example, in the Active Calls pane), and to automatically connect queued and forced delivery calls to your phone.

To enable you to distinguish between calls in different queues, you can set a different colored indicator for each queue. Under **Queue Call Colours**, select **Show Indicator** for each queue that you want to color-code, and then, under **Colour**, browse to the **Colour** dialog box and select the color to use. You can restore the original queue colors by clicking **Restore Defaults**.

Under **Auto Connect**, choose which types of calls you want automatically connected *when your phone rings*:

- **Queued calls** – only broadcast delivery queued calls from standard queues are automatically connected to your phone. All other calls will ring your phone until you answer the call.
- **Forced delivery calls** – only forced delivery queued calls are automatically connected to your phone. All other calls will ring your phone until you answer the call.

If you select both options, all queued calls are automatically connected to your phone.

When you enable either option, you can also specify a **Delay** – the length of time (from 0.5 to 9 seconds in half-second increments) that your phone rings before the call automatically connects. If you do not specify a delay, that type of call is connected immediately.

Directory

The Directory tab enables you to configure and influence the way that contact information is displayed within the Directories pane of the Cisco Unified Attendant Console. It has the following sections:

- **Directory Groups** - Use this to control how each directory will be displayed. Select **All directory groups use the same settings**, and then select the directory from which all others adopt their parameters. If several directories are visible, changing the position or width of a column in one immediately changes the others in the same way.

  Alternatively, if **All directory groups use the same settings** is not ticked, you can select a directory from the table and then configure the selected directory independently of the others.

  The order of directories in the **Directory Groups** list (top to bottom) is the order they are displayed in the Directories pane (left to right). You can change the directory order by selecting a directory in the list and then either:

  - Using the **Up Arrow** and **Down Arrow** controls

  - Dragging it up or down the list
- **Default Display Order** – The data in this contact record field is used to sort the contacts when they are displayed in the directory. Select from **Department**, **First Name**, **Job Title**, **Last Name** (the default), **Location**, **Number** and **User Field 1**.

Note If you change the **Default Display Order** the changes will not appear on your screen until you log out of Cisco Unified Attendant Console and then log back in.

- **Show the following information** – Select the check box for a contact data field to display that field in the directory. The order the fields are listed in is the order in which they are displayed. To change the display order, select a field, and then either drag it or use the Up Arrow and Down Arrow keys to move it a new position in the list.

  If you require fields to appear on the second line, select the field and use the Right Arrow to move the field to the second line. To enable the Right Arrow and to add items to the second line, a minimum of two items, excluding icons, must be selected for the first line.
- **Search Based On** – Select how many and which search fields to use to search for a record in the Directory pane. You can choose up to six **Search** fields. You can control how many search fields to display using **Display this many search fields on the screen**. The default fields are:
  - Last Name
  - First Name
  - Department
  - Keyword
  - Number
  - Quick Search - unified search field which pulls results from the following fields:
    - Department (including Alternate Department)
    - First Name (including Alternate First Name)
    - Last Name (including Alternate Last Name)
    - Location
    - User Field 1
    - User Field 2
    - User Field 3
    - Number (Main Extension, Business 1, Business 2, Home, Fax, Mobile, Pager)

Personal Directory Groups

The Personal Directory Groups tab enables you to share Personal Directory Groups with other users. For more information about Personal Directory Groups, see Personal Directory Groups.

The Personal Directory Groups tab is available only when the following are true:

- You have created at least one Personal Directory Group.
- If you have a resilient Cisco Unified Attendant Console Advanced installation, you must be logged in on the Publisher server. The tab is not visible when logged in on the Subscriber server.

- There is at least one other user in your community to share the Personal Directory Group with.

The tab displays lists of:

- Personal Directory Groups that can be shared (upper list)
- Users with which Personal Directory Groups can be shared (lower list)

To share a Personal Directory Group, do the following:

Step 1 Select the group from the upper list **Select the Personal Directory Group you wish to share**.

Step 2 In the lower list, select the check boxes corresponding to the users you wish to share the Personal Directory Group with. To cease sharing a Personal Directory Group with a user, clear the check box next to their name. If required, use the controls to select or clear the check boxes of all users.

Step 3 Click **OK** or **Apply** (clicking **OK** closes the tab).

If the users selected or deselected as part of your change request are actively logged in to Cisco Unified Attendant Console, they will be presented with an alert advising them of the change.

Contact Sidebar

Use the Contact Sidebar tab to set up the Contact Details Pane.

- **Status Icons**. Select the relevant options to make the icons available in the Contact Sidebar. The list is influenced by the Console configuration and permissions. Unselected fields appear in alphabetical order after the checked fields. The order that the icons are displayed within the Contact Sidebar can be changed by selecting a field and using the Up Arrow/Down Arrow controls to change the presented order.
- **Contact Details**. Select to make the fields available in the Contact Sidebar.

  The selected items display the data field in the Contact Sidebar in the order they appear within this configuration list. The order can be changed by selecting a field and using the Up/Down controls to change the order presented. You can also drag and drop a field into the desired position.

  Fields that are not selected appear in alphabetical order after the checked fields.
- **Contact Notes**. You can choose to display the Contact Information or Absent Notes by selecting the box next to the relevant type of note.

  If a color has been specified for a particular category of note, then this is displayed in the Contact Sidebar. The color is set when adding Absent Message and Contact Information.

After completing the configuration, click **Apply** or **OK** to make the changes.

Alternate Numbers

Use the Alternate Numbers tab to define how to display any alternative number information that a contact may have.

The **Show the following information** setting enables you to specify what information is displayed for a contact. Click the check boxes to select the information. Select an information type and then use the up/down arrows to change the order in which the information is displayed.

Use **Alternate Numbers Display Order** to select an alternate number and then use the up/down arrows to specify the order in which the information is displayed. Set this to the same order used in the Directories pane.

Field Headers

You can change the text of **Field Headers** that appear in the application by replacing the existing **Display Text** of any **Default Text** entry with your preferred text. These changes will only affect your user account.

To change the **Display Text** for **Field Headers**, do the following:

Step 1 Select the text in the **Display Text** column. Initially, this is the same as the **Default Text**.

Step 2 Type new **Display Text**.

Step 3 Click **OK**.

To restore the default text for all field headers, click **Restore Defaults**.

Secondary Sort

When you search a directory, matching contacts are first sorted according to the column you are searching, and then they are sorted according to a *secondary sort column*. For example, if you are searching for a *Last Name* beginning "Sm", and the Last Name column has *First Name* defined as its secondary sort column, you might see something like this:

Smart John - Sales

Smith Anne - Sales

Smith Michael - Marketing

Smith Theresa - Administration

Smythe Adam - Marketing

The Smiths are sorted according to first name.

If you now change the Last Name secondary sort column to *Department*, the same search would return:

Smart John - Sales

Smith Theresa - Administration

Smith Michael - Marketing

Smith Anne - Sales

Smythe Adam - Marketing

Every column in your directory has a default secondary sort column You can change this default to any column you want.

To change a secondary sort column, do the following:

Step 1 In the **Secondary Sort** pane, for your chosen **Sort Column**, click the corresponding value in the **Secondary Sort Column**.

Step 2 From the menu, choose a new secondary sort column. You can change the secondary sort column for as many Sort Columns as you require.

Step 3 Click **OK**.

If you change a secondary sort column, you can restore all default values by clicking **Restore Defaults**.

Filter Search

As you search in any of the search fields within the directories, you can specify how you want the search to perform on screen. This tab enables you to set those preferences by selecting the following options:

- **During call control**

  Select **Retain existing directory search** to retain the search results during call control events. If you do not select this, call control events (such as call answered, new call directly to user's extension, and call ended) clear the search results and re-display the full directory. When you select this you have to press **Shift+F3** to clear the search results.

- **AND Searching**

  This enables you to select two criteria at once and search for entries that meet both of them. For example, ***John*** in the **First Name** and ***Smith*** in the **Last Name**. The search returns only those records that meet the criteria entered in *both* fields.

  Select **I want to use AND Searching** to enable this function.

Note You can also activate this feature by choosing **Options** > **Filter Searching** and then **Use AND Searching**.

  With the function enabled, by default, typing in a search field clears the one to the right, forcing you to define the search from left to right. You can disable this behavior by clearing **Clear remaining search fields when typing**.

- **When Performing a Filter Search**
  - **Press Enter to perform search** – Once you have entered some information in any one of the search fields, selecting this option performs a search when you press **Enter**.
  - **Search after every key press** – This option refreshes the search results with every key you press to enter a search value in the field. This is the default setting. This option is disabled if you select **I want to use AND Searching**.
  - **Search after a delay** – If this option is selected and you enter information in the search field, the search result will be displayed with a delay in seconds specified using the **Search Delay** slider.

- **Lateral Search**

  The Lateral Search feature enables you to search for an alternative contact by pressing **Ctrl+F2**. Select from **None**, **First Name**, **Last Name**, **User Field 1**, **Job Title**, **Location**, **Department** or **Number**. Selecting **None** disables Lateral Searching.

Security

This tab enables you to change your user login type between single-sign on (SSO) or local (non-SSO), and to set whether the application remembers your login details. *You can access this tab even when not logged in.* For information about SSO, see Logging In.

To change your login type, under **Login**:

Step 1 Either:

- Select **Use Single Sign On** to log in next time using SSO.
- Clear **Use Single Sign On** to log in next time as a local user.

Step 2 Either:

- Select **Remember my login name** so that:
  - For local (non-SSO) logins, your login name is automatically inserted next time you log in.
  - For SSO logins, when you next open the **Login** dialog box you are automatically logged in.
- Clear **Remember my login name** so that:
  - For local (non-SSO) logins, you must type your login name next time you log in.
  - For SSO logins, you can change the user name next time you open the **Login** dialog box.

Step 3 Click **Apply**, for the changes to take effect next time you log in.

Logging

Leave these settings as is, unless instructed by your system administrator.

This tab enables you to turn logging on and off. Use the check boxes to control the following:

- **Database** – select to enable database activity logging.
- **Server Communication** – select to enable server communication logging.

The user log path and file name is displayed for reference.

Advanced

The Advanced tab controls:

- Which types of directly transferred calls (according to their destination) are reverted back to you if unanswered. Contact your system administrator before making changes to these settings as they may impact call flow and user experience.
- Which contact data fields offer previously entered values as you type, thus enabling you to add and edit data quickly and efficiently. All “Company” fields and “User fields” have this functionality.

When transferring calls

Under **When transferring calls**, select which types of unanswered directly transferred calls you want to revert back to you following timeout:

- **All calls** (the default): enables transfer recall functionality for all calls. Callers will hear music on hold (instead of ringing) while the call is waiting to be accepted. The originating CLI (Caller Line Identification – Caller ID) will not be presented to the end party device until the call is connected
- **Internal calls**
- **External calls**
- **No calls**: disables transfer recall functionality for all calls. This option displays the originating CLI when the call is ringing on the end party device. Callers will hear ringing (instead of music on hold) while being transferred.

Note This feature takes up to a minute to become active after you log in or enable it.

Pre-defined field content

You can set the following contact data fields - which appear in the **Contact Details** window and in the **Add Contact** tab of the Contacts Details pane - so that when you type into them you are offered a list of matching data that has already been entered into the database (for those directories you have access to):

- Company
- Cost Center
- Department *
- Job Title *
- Location *
- Room Name *
- Section *
- User Field 1
- User Field 2
- User Field 3

The closest match is highlighted in the list, and the text required to make the string you are typing match it is appended to the string. Fields in this list marked with an asterisk also automatically capitalize the words you type to match the rules set for them.

For example, if your database already contains the department Sales Europe, and want to enter the previously unsaved Sales Asia for a contact, then when you have typed Sales, you are offered Sales Europe - it is highlighted in the list and your string is automatically extended to Sales Europe, with Europe highlighted.

- To accept the extended string, simply press **Enter** or **Tab** (Tab also moves the cursor to the next field).
- To enter Sales Asia, simply keep typing and then press **Enter** or **Tab**.
- If you want to enter just Sales, press Delete to remove the highlighted part added to your string, and then press **Enter** or **Tab**.

CHAPTER 3

Managing Directories and Speed Dials

This section describes how to use Cisco Unified Attendant Console Advanced to manage Personal Directory Groups and Speed Dials:

- Full Directory
- Personal Directory Groups
  - Creating Personal Directory Groups
  - Viewing Personal Directory Group Details
  - Modifying Personal Directory Groups
  - Deleting Personal Directory Groups
- Managing Speed Dials
  - Adding Entries to the Speed Dial Pane
  - Deleting Entries from the Speed Dial Pane
  - Updating Entries in the Speed Dial Pane

Full Directory

The **Full Directory** tab is where corporate contacts (if configured by your system administrator) and manually generated contacts will appear. To create, modify, and delete contacts see Chapter 3, “Managing Directories and Speed Dials”.

Personal Directory Groups

See Personal Directory Groups for a list of Personal Directory Group features.

Creating Personal Directory Groups

To create a Personal Directory Group:

Step 1 Select the Directories pane, and then do one of the following:

- Click the **Create a new Personal Directory Group** tab + or icon 📁.
- Press **F4.**
- Right-click and choose **Personal Directory Group > New**.

The **New Personal Directory Group** dialog box appears.

Step 2 Under **Details**, type a meaningful **Name** and **Description** for the group.

Step 3 Under **Filter**, select a **Field** on which to filter the contacts.

Step 4 Under **Filter**, select the comparison to make:

- **begins with**
- **contains**
- **ends with**
- **is equal to**
- **is greater than or equal to** (numeric Field data only)
- **is less than or equal to** (numeric Field data only)

Step 5 Under **Filter**, type a **Value** to compare the Field data against.

For example: Field: **Last Name**, comparison: **begins with**, and Value: **K**, creates a directory of contacts whose last name begins with K.

Step 6 You can click **New** to add more criteria, up to a maximum of three. Click **Remove** to remove criteria.

Step 7 Click **OK** to create the Personal Directory Group.

Note

- Once you have shared a Personal Directory Group, you cannot change the criteria used to create it.
- Personal directories using the **Number** field to filter by will compare the value to all indexed number fields (Main Extension, Business 1, Business 2 and Mobile).
- There is not an option to limit the scope to a specific number field. The directory likewise displays the Main Extension number or the prioritized substitute (**Options > Preferences > General > Internal Contacts Number Priority**). The on-screen results may appear inconsistent when compared to the filter.

  For example:

  - Contact A has the primary number **22222** and a Business 1 number of **1111**.
  - In the full directory, Contact A’s number shows **22222**.
  - You create a Personal Directory Group with a filter **Number is equal to 1111**.
  - When viewing the Personal Directory Group, Contact A will be displayed with the number **22222**.

Viewing Personal Directory Group Details

To view the details of a Personal Directory Group, such as the owner and the filter, do the following:

Step 1 Select the Personal Directory Group.

Step 2 Do one of the following:

- Press **Shift+F4**.
- Right-click and choose **Personal Directory Group > Details**

The **Personal Directory Group Details** dialog box appears.

Step 3 Click **Cancel** to close it.

Modifying Personal Directory Groups

Only the owner of a Personal Directory Group can modify the criteria used to create it. If you have shared a Personal Directory Group, you cannot modify it until you stop sharing it.

To modify a Personal Directory Group, do the following:

Step 1 View the Personal Directory Group details.

Step 2 In the **Personal Directory Group Details** dialog box, change the criteria as required.

Step 3 Click **OK**.

Deleting Personal Directory Groups

When deleting Personal Directory Groups, be mindful of the following:

- Only the owner of a Personal Directory Group can delete it.
- If you delete a Personal Directory Group, it no longer exists within the system.
- If you try to delete a Personal Directory Group to which you have manually added contacts, you are given the option of moving them to the full directory rather than deleting them.

To delete a Personal Directory Group, do the following:

Step 1 Select the Personal Directory Group.

Step 2 Do either of the following:

- Press **Ctrl+F4**.
- Right-click and choose **Personal Directory Group > Delete**.

The **Delete Personal Directory Group** dialog box appears. The contacts in the Personal Directory Group are listed; those with alternate numbers are shown at the top of the list.

The dialog box asks you to confirm that you want to delete the Personal Directory Group. If the group is shared, the dialog box also contains a warning that the group is shared with other users and that it will be removed from their screens if you continue.

Step 3 If your Personal Directory Group does not contain manually-added contacts, continue at Step 5.

If you have manually-added contacts to the Personal Directory Group *that do not exist in any other Personal Directory Group*, you are warned of this fact, and given the option to move them to the Full Directory before the Personal Directory Group is deleted.

Step 4 To delete the Personal Directory Group and all the contacts in it, select **Delete contacts**.

OR

To move contacts to the Full directory before deleting the Personal Directory Group:

a. Select **Move contacts to the full directory**.

The manually added contacts are listed. By default, they are all selected for moving to the Full directory.

b. Select each contact you want to move to the Full directory; deselect any that you do not want to move.

Note If you clear *all* the contacts, you must either select some contacts to move or select **Delete contacts** before continuing.

Step 5 Click **Yes**.

- If you *have not manually added* contacts to the Personal Directory Group, it is deleted.
- If you *have not chosen to move any manually-added contacts* to the Full Directory, the contacts and the Personal Directory Group are deleted.
- If you *have chosen to move any manually-added contacts* to the Full Directory, the contacts are moved and the Personal Directory Group is deleted.

Note Any user(s) that the Personal Directory Group was previously shared with will receive a pop-up advising that the group has been deleted. The tab will then disappear from their screens.

Managing Speed Dials

Adding Entries to the Speed Dial Pane

To add a number to the Speed Dial pane, do one of the following:

- Drag and drop a contact from a directory into the Speed Dial pane.
  - In the **Confirm Private Speed Dial** dialog box, click **Yes**.

  or

- Press **Alt+F6** or right-click the Speed Dial pane and choose **Add Speed Dial**.
  - Type the contact **Number**, **Name** and **Company** to be saved as a speed dial.
  - If you want the speed dial to be visible to all users, clear the **Private Speed Dial** check box.
  - Click **OK**.

Deleting Entries from the Speed Dial Pane

To delete an entry from the Speed Dial pane, do the following:

Step 1 Select the speed dial you want to delete.

Step 2 Press **Alt+D** or right-click and choose **Delete Speed Dial**.

Step 3 Click **Yes** on the confirmation message.

Updating Entries in the Speed Dial Pane

To update an entry in the speed dial pane, do the following:

Step 1 Select the speed dial you want to update.

Step 2 Press **Alt+S** or right-click and choose **Edit Speed Dial**.

Step 3 Change the **Name**, **Number** and **Company** as required.

Step 4 Change the **Private Speed Dial** setting, as required.

Step 5 Click **OK**.

CHAPTER 4

Managing Directory Contacts

This section describes how to use Cisco Unified Attendant Console Advanced to manage Directory Contacts in the following ways:

- Adding Contacts to Directories
  - Adding contacts from the Directory pane
  - Adding contacts when taking a call
  - Adding contacts from the Contact Details pane
- Deleting Contacts from Directories
- Modifying Contact Details
  - Defining and Modifying an Assistant and Alternate Contacts

Adding Contacts to Directories

You can create new contacts in any of the directories displayed: full or personal. Contacts added to the full directory are available to all users. Contacts added to a Personal Directory Group are available only to the owner (creator) of the group and any other user with which the group has been shared. The owner of a Personal Directory Group and any users sharing the group can add, delete and edit contacts in it; these changes are visible to all users sharing the Personal Directory Group.

You can select a contact in the Full Directory and drag it to a previously created Personal Directory Group tab, regardless of whether it matches the criteria set for that group. Contacts added to Personal Directory Groups cannot be dragged to the full directory.

Note If you have a resilient Cisco Unified Attendant Console Advanced installation, you must be logged into the Publisher server to be able to add, delete or change contacts.

Operators can create new internal or external contacts as long as their number is provided. All other information is optional.

You can add contacts in the following ways:

- From the Directory pane
- While taking a call
- From the Contact Details pane

Adding contacts from the Directory pane

To add a contact from the Directory pane:

Step 1 Select the required Directory pane by pressing **F3**, then press **Alt+<number>** for the required directory, or click the **Personal Directory Group** tab.

Step 2 Press **Ctrl+T** or right-click within the directory and select **Add Contact**. The **Contact Details** window appears.

Step 3 Add the Contact details as required. To help you do this, you can use the Pre-defined field content functionality.

Step 4 Press Enter, or click **OK**.

Note Within the Numbers tab, the following fields may require information. Contact your system administrator to confirm if these settings are required:

- **Limit BLF to Device Name** - the CUCM device name is used to retrieve a contact's BLF information. This device name is either:
  - Part of the contact's details, entered in the **Device Name** field below.
  - Automatically computed by Cisco Unified Attendant Console Advanced using the device-selection algorithm.

  If the contact has a single phone, select **Limit BLF to Device Name** and manually enter the contact's device name. If the contact has multiple phones or uses Extension Mobility, clear **Limit BLF to Device Name**.
- **Device Name** - Cisco Unified Communications Manager device name. Case-sensitive. This field is inactive if **Limit BLF to Device Name** is not selected.
- **Disable BLF** – unchecked by default, which means that the operator will fetch the BLF status. However, users have the option to disable BLF against any contact by checking this option. By checking **Disable BLF**, the options **Limit BLF to Device Name** and **Device Name** become unavailable.

Adding contacts when taking a call

To add a contact when taking a call:

Step 1 Press **F12** while there is an incoming call for the **Contact Details** window to open.

Step 2 The caller's number appears on the Contact Numbers tab. An internal number appears in the Main Extension field, an external number appears in the Business1 field.

Step 3 Add any additional information that you want to save about this Contact, and press Enter, or click **OK** to save.

Note The contact's details are saved in whichever directory or Personal Directory Group is open at the time. If the contact is saved to a Personal Directory Group, it is only available to operators with access to the Personal Directory Group.

Adding contacts from the Contact Details pane

You can add contacts using the Contact Details pane if the following are all true:

- The Contact Details pane is visible. For how to make it visible, see Controlling how panes are displayed.
- You are browsing a Personal Directory Group, or you are browsing the full directory and have rights to create a new contact there.

To add a contact from the Contact Details pane:

Step 1 Select the **Add Contact** tab.

Step 2 Either:

- Drag details of an existing contact from the viewed directory and drop it into the list of fields, and then modify the details, as required. You can only drag and drop details when you have not yet entered anything into the fields.
- Enter new contact details into the fields. To help you do this, you can use the Pre-defined field content functionality.

You can continue browsing directories for contacts while you are entering new contact details.

Step 3 Click **Save** to save the contact to the database.

If you add a contact to a shared Personal Directory Group, you are warned that other users may edit or delete the contact.

If you log out with unsaved contact details, you are prompted to either continue adding them or to discard the contact and continue logging out.

Deleting Contacts from Directories

You can remove manually-added contacts from any directory. You cannot delete contacts belonging to a corporate directory.

Note Deleting a contact from a directory permanently removes the contact from the system.

To delete a contact, do the following:

Step 1 Select the contact, and either press **Ctrl+D** or right-click and select **Delete Contact**.

A confirmation window appears.

Step 2 Click **Yes** to delete contact from the directory.

Modifying Contact Details

To view additional information associated with contacts in the directory, you can open the Contact Details window. The Contact Details window displays all available information for the selected contact. You also modify contact details from this window. Details are spread across five tabs:

- Details – Including, but not limited to, name, address, email
- Contact Numbers – Including, but not limited to main extension, mobile, home phone
- Alternate Contacts – Assistant and alternate contact(s)
- Company – Including, but not limited to, job title, company, department
- Keywords – Keyword Details lists the keywords associated with this contact. To add more, type them into the field and click **Add**. To replace an existing keyword, select it, type a different one and click **Replace**. To delete a keyword, select it and click **Delete**.
- Notes – Contact absent message and contact information

All users have access to view and modify (except for fields that are grayed out) contacts belonging to the directory. Any modifications will be visible to all users.

To edit contact details, do the following:

Step 1 Select a contact.

Step 2 Open the **Contact Details** window. Do one of the following:

  - Press **F12**.
  - Right-click and then choose **Contact > Contact Details**.
  - Click **Contact Details** .

Step 3 Make modifications to any field that is not unavailable.

Step 4 Click **OK** once your modifications are complete.

Note Unavailable fields belong to the corporate directory. If modifications are required, contact your system administrator.

Defining and Modifying an Assistant and Alternate Contacts

Open the Contact Details window where you have the option to specify:

- One **Assistant**
- One or more **Alternate Contacts**

To add, edit, or remove an alternate contact or assistant, do the following:

Step 1 Open the **Contact Details** window.

Step 2 Click **Alternate Contacts** in the navigation pane.

Step 3 Click **Add** or **Replace** beneath the Assistant or Alternate headers as required.

OR

Click **Delete** to remove contacts, and skip to Step 5.

Step 4 Within the **Select Assistant** or **Select Alternate** window, search for and select the required contact. Click **Add**.

Repeat steps 3 and 4 to add any additional contacts.

Step 5 Once finished, click **OK**.

CHAPTER 5

Using the Directories

This section describes how to use Cisco Unified Attendant Console Advanced to use the Directories in the following ways:

- Searching the Directory
- Lateral Searching
- Expanded Contact Details
  - Open Contact Details
  - Emailing Contacts from the Contact Details Window
  - Dialing External Numbers from the Contact Details Window
  - Adding, Modifying and Removing Absent Message and Contact Information
  - Detailed Contact Phone Status, Presence Status and Alternate Contacts
- Viewing the details of an active call on a directory contact’s extension

Searching the Directory

To locate a person or number, do the following:

Step 1 Press **F3** to move your cursor to the first search field of the selected directory tab.

OR

To navigate to a different directory tab:

- Using the keyboard, do either of the following:
  - Press **Ctrl+Tab** and **Ctrl+Shift+Tab** to select the next or previous directory.
  - Navigate directly to any of the first ten tabs by pressing **Alt+<number>**, where <number> is a value between 0 to 9, where 0 represents the tenth tab and 1 represents the first tab.
- Using the mouse, do the following:
  - Click the directory tab you require.

Note When selecting a directory tab via keyboard or mouse, the cursor will default to the first search field of the selected directory.

Step 2 Begin typing if you intend to search the directory using the first search field. Move to the next field by pressing the **Tab** key. Pressing **Ctrl+Tab** moves your cursor back to the first search field.

To search on two fields at once, AND Searching must be enabled (see Filter Search).

Type search criteria in the respective fields, moving left to right. Results will appear as you type.

Note Results are displayed either as you type or after you press the **Enter** key. This preference is defined in the **Options > Preferences > Filter Search** menu, under **When Performing a Filter Search**.

Lateral Searching

When you perform a lateral search, you filter the contact list to display contacts whose <user option specified> field matches that of the selected contact.

For example, if you set **Lateral Search** to **Department**, and select a contact with the Department name *Accounting*, when you perform a lateral search, the Lateral Search results window lists all contacts with a Department equal to Accounting.

To define the Lateral Search field choose **Options > Preferences > Filter Search**, then select a field from the drop down menu. Choose one of the following **Indexed Fields**:

- None - lateral searching is disabled
- First Name
- Last Name
- User Field 1
- Job Title
- Location
- Department
- Number (searches Main Extension, Business 1 and Mobile Fields)

To perform a lateral search:

Step 1 In a directory, select a contact with data in the defined lateral search field.

Step 2 Press **Ctrl+F2**.

The **Lateral Search** window appears, containing the matching contacts. The title bar contains details of the search.

Step 3 Press **Esc** to close the window, and continue.

OR

To drill down further, hold **Shift** and then click the field containing the data you are looking for.

For example, to find all contacts named *James Smith* in a **Lateral Search** result list for last name Smith, click any contact that has *James* in the **First Name** field. Only contacts named James Smith are now displayed.

Note You can select any non-graphical field displayed for any contact, so long as it has been indexed in the directory. For a list of indexed fields, see Indexed Fields.

Wildcard Searching

Users can perform wildcard searching to find contacts more easily by using * for multiple characters or ? for single characters.

- The character ***** can be entered anywhere within a search term and it will match multiple characters, for example, searching for “J*n” will match “Jon”, “John”, “Jason”, “Jonathan”.
- The character **?** can be entered anywhere within a search term and it will match an individual character, for example, searching for “J?n” will match “Jon”, “Jan” and “Jennifer” but it will not match “Joan” or “John”. Similarly, searching for “J???n” will match any words beginning with J that contain at least 5 letters, where the 5th letter is N.

Expanded Contact Details

Open Contact Details

To view additional information associated with contacts in the directory, you can open the **Contact Details** window. The Contact Details window displays all available information for the selected contact. You also modify contact details from this window. Details are spread across five tabs:

- Details: including, but not limited to, name, address, email
- Contact Numbers: including, but not limited to main extension, mobile, home phone
- Alternate Contacts: assistant and alternate contact(s)
- Company: including, but not limited to, job title, company, department
- Keywords: Keyword Details lists the keywords associated with this contact. To add more, type them into the field and click **Add**. To replace an existing keyword, select it, type a different one and click **Replace**. To delete a keyword, select it and click **Delete**.
- Notes: contact absent message and contact information

All users have access to view and modify (except for fields that are unavailable) contacts belonging to the directory. Any modifications will be visible to all users.

To open a Contact Details window, do the following:

Step 1 Select a contact.

Step 2 Do one of the following:

- Press **F12**.
- Right-click and then choose **Contact > Contact Details**.
- Click **Contact Details** .

The Contact Details window appears.

Emailing Contacts from the Contact Details Window

Step 1 Open the **Contact Details** window.

Step 2 Click **Details** in the navigation pane. (Details is selected by default when you first launch the Contact Details window).

Step 3 Click the email icon to write an email to the right of the email address you intend to send the message to.

Note The email icon is only active when the email field is populated.

Step 4 Your default mail application is launched. A new email message is started with the selected email address prepopulated in the recipients list.

If you do not have an email application configured, contact your system administrator.

Dialing External Numbers from the Contact Details Window

Step 1 Open **Contact Details** window.

Step 2 Click **Contact Numbers** in the navigation pane.

Step 3 Click the number you intend to call:

- Main Extension
- Business 1 - business phone number
- Business 2
- Home - home phone number
- Mobile - mobile phone number
- Pager - pager phone number
- Fax - fax phone number

Step 4 Click **Use Number**.

Step 5 Click **OK** to close the window.

Step 6 Click the selected number in the **Active Calls** pane, and press **Enter**.

Adding, Modifying and Removing Absent Message and Contact Information

Additional contact information and an absent message can be attached to contacts. These are free-text fields and can cover things like vacations, unable to be disturbed, or absent.

Contact information can be attached to any of the contacts in the directories, and an absent message to any of the devices in the Busy Lamp field or the directories.

To add contact information or absent message:

Step 1 To open the Contact Notes window,

- select a contact from the directory and press **Ctrl+N**.

- alternatively, select the required contact from the directory pane. Then right-click the contact and select **Contact**. From the additional menu select **Contact Notes**.

Step 2 The **Contact Details** dialogue box appears showing the **Note** tab.

Step 3 Select **Contact Notes Icon Colour**. This is used to colour-code the note. For example, red notes might indicate that a contact is on vacation.

Colour	Flag
Red	{R}
Green	{G}
Blue	{B}
Cyan	{C}
Violet	{V}
Lime	{L}
Olive	{O}
Teal	{T}
Maroon	{M}
Navy	{N}
Fuchsia	{F}

Step 4 Enter Contact Information or a Contact Absent Message.

Step 5 Click **OK**.

Note
- Absent message are not available for external contacts.
- In the **Options > Preferences > Display** tab, under **Enhanced Coloured Notes** select **Highlight entire row with notes colour** to apply a background colour to the contact as well as the Contact Information and Absent Message boxes using the colour set under Contact Details.

Any entered information can be seen on all operator screens where the same contact is displayed. If a contact has additional information or an absent message, the Contact Details pane displays a note icon, and if you hover over the contact or the note icon, a tool tip displays the contents of the note.

To remove additional information, do the following:

Step 1 Select the contact and go to the **Contact Notes** tab.

Step 2 Remove the text from the desired message box.

Step 3 Click **OK** to complete.

Detailed Contact Phone Status, Presence Status and Alternate Contacts

Busy Lamp Status and the **Default Presence Source** status are presented within the console directory tabs by default, under their respective headers. They are presented in the form of icons and tooltips (see Table 5-1 for a list of Busy Lamp Field Status indicators and Table 5-2 for a list of Presence Source status icons).

For further information regarding a contact's Presence Status and Alternate Numbers, do one of the following:

- Press **F2**.
- Right click the contact, and select **Contact (name) > View Alternate Numbers with Presence**.

  The **Alternate Numbers For <contact> - [<presence>]** window appears.

Note This window also appears when you transfer a call to an extension with a presence status assigned.

Under **Presence Status Details**, you can use the navigation pane on the left to display pages containing the following information:

- **Summary**: the default setting, showing phone status and any configured presence statuses.
- **Phone:** Busy Lamp Status of the contact's extension number. (See Table 5-1 for a list of the Busy Lamp Status icons.)
- Enabled **Presence Sources** (if configured by your system administrator):
  - WebEx Messenger
  - Skype for Business
  - Cisco IM&P

    See Table 5-2 for a list of presence source icons.
- **Notes**: displays contact information and absent messages.
- **Alternate Contact Details** displays:
  - All numbers associated with the contact (main extension, home, business 1, business 2, pager, and mobile)
  - Assistant contact details
  - Alternate contact(s) details

  Use the call controls under the Alternate Contact Details to:
  - Answer a Call: you can accept calls ringing on any of the presented lines.
  - Initiate a Call: select a call using either the Up and Down keys or mouse. Press the Enter key or click Call .
  - Execute a call control against an active call: if you are actively processing a call when you launch the Alternate Numbers windows, the call controls will be executed against your active call.

  Available call controls include:
  - Consult Transfer (Keyboard shortcut - press the Enter key once)
  - Blind Transfer (Keyboard shortcut – press the Enter key twice, in quick succession)
  - Transfer to Voicemail

- Hold
- Hold with Notes
- Start Conference
- Park Call

Table 5-1 describes the BLF status icons.

Table 5-1 Busy Lamp Field (BLF) Status Icons

Icons	Description
☎	On-hook
☎⇄	Connected
☎✗	Unavailable
☎⛔	Do not disturb
☎↓	Ringing in
☎↑	Ringing out
☎✓	Diverted: if you hover over a directory contact with this status, you will see the diverted extension in the tool tip.
↷🖭	Diverted to voicemail
📝	Notes

Table 5-2 describes Cisco IM&P, WebEx Messenger, and Skype for Business Presence Icons.

Table 5-2 Cisco IM&P, WebEx Messenger and Skype for Business Presence Icons

Unified CM and WebEx Icon	Skype Local Icon	Status	Description
🟠	🕓	Away	Contact away\be right back.
🔴	🔴	Busy	Contact busy.
🔴	⛔	DND	Contact has set Do Not Disturb (DND).
●	○	Offline	Contact offline.
🟢	✓	Online/ Available	Contact online/available.
●	?	Unknown	Contact presence status unknown.
🔴		Derived	Contact busy.
	🕓	Inactive	Contact idle.
	🕓	Inactive Busy	Contact in a meeting but became idle.
	⬅	OOF	Contact Out Of Office.

Viewing the details of an active call on a directory contact's extension

You can view the status and details of active calls, on a directory contact's main extension.

To view the status, open the status window by doing the following:

Step 1 Right-click a contact within the directory.

Step 2 Select **Contact** > **Status** > **Calls**.

Within the Calls pane, the following information is presented:

- **Name** of the contact (if available).
- **CLI** number the call was made from.
- **DDI** number the call was made to.
- The **Status** of the call (ringing, held, connected, or busy).

You can answer any ringing call by clicking **Answer** .

Step 3 Click **OK** to close the window.

Call Controls

This section describes how to use Cisco Unified Attendant Console Advanced for the following actions:

- Placing Outbound Calls
- Clearing Calls
- Answering Calls
- Transferring Calls
- Holding Calls
- Muting Calls
- Parking Calls
- Retrieving Parked Calls
- Conferencing Calls
- Toggling Calls
- Controlling Reverted Calls
- Re-establishing Calls
- Supplying FACs and CMCs
- Forwarding Queues to Emergency Mode Destination
- Sending Emails

Note When using a sign-in device like Cisco IP Phone or Jabber Softphone to execute call controls, consider the following:

- To leverage all Cisco Unified Attendant Console Advanced call control features and build comprehensive reports, aside from answering and terminating calls, call controls (transfer, hold, park, conference and so on) must be executed within the console application.
- Answering and terminating calls from the sign-in device or an equipped headset is supported. To avoid duplicate answer or terminate requests resulting in call control errors, execute the call control from either the console client application or the sign-in device.
- Call controls initiated from within the console application must be completed within the console application. For example, if initiating a consult transfer from the console application, it must be completed using the console application. The same applies to using the sign-in device to execute call controls. For example, if initiating a consult transfer from the sign-in device, it must be completed using the sign-in device.

Placing Outbound Calls

Placing a call to a directory contact or speed dial

To place an outbound call to a selected contact or speed dial using the keyboard, press the **Enter** key to initiate the call.

To place an outbound call to a selected contact or speed dial using the mouse, do either one of the following:

- Double-click the contact or speed dial.
- Right-click the contact or speed dial, and select **Call**.

Placing a call to a manually dialed number

Instead of selecting a contact from a directory and then making a call, if the cursor is not in a search field, you can dial a number using your keyboard (formatting the number as you would if dialing from your phone). As you type, the digits appear in the field at the bottom of the Active Calls pane. You can use the following keyboard shortcuts to edit the number:

- Backspace – Erase a digit
- Space Bar – Clear the number while dialing out
- Enter – Start the call

Note You may be required to input an external access code to place external calls (for details, see Supplying FACs and CMCs).

Clearing Calls

To clear a call using the keyboard, do the following:

Step 1 Press **F7** to select the Active Calls pane.

Step 2 Press **Enter**.

To clear a call using a mouse, do one of the following:

- Double-click the call within the Active Calls pane.
- Right-click the call within the Active Calls pane, and select **Clear Call**.
- Click the **Clear Call** button in the call control toolbar.

Answering Calls

To answer a call that is in a ringing on your handset (displays a ringing state in the Active Calls pane, call tag), do the following:

- Nothing: if you have Auto Connect enabled for queue calls, the call will automatically move to a talking state. (Preference location: **Options > Preferences > Queued Calls > Auto Connect** menu)
- Pick up the handset.
- Press **Enter**.
- Double-click the call.
- Click Answer Call .

Taking Calls from Cisco Unified Attendant Console Queues

Calls coming into the Cisco Unified Attendant Console queues are prioritized and stacked in the Queued Incoming Calls pane. How those calls are accepted is determined by the type of queue. Within the (F9) Queues pane, the icon next to the individual queue names indicates the queue type.

- Broadcast Delivery Queues: represented by blue icons .
- Forced Delivery Queues: represented by green icons .

You can only process one call at a time. Therefore, the following steps only apply when you have no active calls within the Active Calls pane.

Broadcast Delivery Queues

Incoming calls to broadcast delivery queues are stacked in descending order by priority (priority is set by your system administrator) in the Queued Incoming Calls Pane (F8). Broadcast queue calls require users to manually accept (take) them from the queue. There are two ways to accept a call from a broadcast queue:

- **Answer Next**: automatically accepts the next highest priority call in queue.
- **Cherry Picking**: manually select a call in queue to accept.

Answer Next

Use Answer Next to answer the next highest priority call in queue.

To accept the next call using the keyboard, do the following:

Step 1 Press the **Answer Next** (+ (plus)) key.

The next highest priority call is moved to the Active Calls pane.

Step 2 Answer the call (see Answering Calls for options).

To accept the next call using the mouse, do the following:

Step 1 Right-click in the Queued Incoming Calls pane.

Step 2 From the menu, choose **Answer Next**.

Irrespective of the call you right-clicked, the next highest priority call is moved to the Active Calls pane.

Step 3 Answer the call (see Answering Calls for options).

Cherry Picking

If the call you intend to cherry pick does not appear in your current view, press F9 to select the Queues pane. Then use the Up and Down arrow keys to select the required queue

To cherry pick a call using the keyboard, do the following:

Step 1 Select the Queued Incoming Calls pane by pressing **F8**.

Step 2 Using the Up Arrow and Down Arrow keys, select the call to accept.

Step 3 Press **Enter** to move the call to your Active Calls pane.

Step 4 Answer the call (see Answering Calls for options).

To cherry pick a call using the mouse, do the following:

Step 1 Within the Queued Incoming Calls pane, do either of the following:

- Double-click the desired call.
- Drag and drop the desired call from the **Queued Incoming Calls** pane in the Active Calls pane.

Step 2 Answer the call (see Answering Calls for options).

Forced Delivery Queues

Incoming calls to forced delivery queues are immediately delivered to available users not tending to an active call. The users are selected in a round-robin, or circular, fashion, determined by the order in which they log in to the console application. If no users are available when calls arrive in queue they are prioritized and stacked in queue, until a user becomes available.

- No input is required to accept calls from forced delivery queues.
- Once the call appears in your Active Calls pane, you can answer it (see Answering Calls for options).

If you do not answer the call within a set duration (defined by your system administrator), the call will be routed to the next available user. If no other user is available, the call will attempt delivery to you again.

Transferring Calls

There are two methods of call transfers:

- **Blind transfer**: initiate and complete the transfer without consulting with the recipient.
- **Consult transfer** (announced): completed transfer after consulting with the recipient.

To transfer a call, it must be in a *talking* state.

Forced Authorization Code (FAC) and Client Matter Code (CMC) Prompts

You may need to provide a Forced Authorization Code (FAC) and/or Client Matter Code (CMC) to perform a transfer to an external or international number. If required, when you initiate the consult or blind transfer to an external or international number, the following will happen:

Step 1 A **Code Required** dialog box will appear on screen, when your transfer is initiated:

- For Force Authorization Code (FAC), the text on the screen is *Please enter Force Authorization Code*.
- For Client Matter Code (CMC), the text on the screen is *Please configure Client Matter Code*.

Step 2 Type the correct code, and then click OK.

If the correct code is provided, your call will be made.

If you failed to provide a code or provided an incorrect code, the call will fail.

If you have any questions, contact your system administrator.

Blind Transferring Calls

Blind Transferring Calls to a Dialed Number

To blind transfer a call to a dialed number, do the following:

Step 1 Answer a call or select the call in the Active Calls pane by pressing the F7 key.

Step 2 Type the destination number. The cursor is automatically placed in the Dial Box.

Step 3 Press **Enter** twice in quick succession (within 1.5 seconds) to execute the blind transfer.

OR

Press **Shift+Enter** to execute the blind transfer.

Blind Transferring to a Directory Contact

To blind transfer a call to a Directory Contact using the keyboard, do the following:

Step 1 Answer a call or select the call in the Active Calls pane by pressing the F7 key.

Step 2 Execute your directory search (see Searching the Directory for instructions).

Step 3 If more than one result is returned, use the up and down arrows to select the intended contact, otherwise continue to the next step.

Step 4 Press **Enter** twice in quick succession (within 1.5 seconds) to execute the blind transfer.

OR

Press **Shift+Enter** to execute the blind transfer.

To blind transfer a call to a Directory Contact using the mouse, either right-click the required contact and select **Blind Transfer** or do the following:

Step 1 Answer a call or select the call in the Active Calls pane by pressing the F7 key.

Step 2 Execute your directory search (see Searching the Directory for instructions).

Step 3 Double-click the required contact to initiate the transfer or drag and drop the active call on the required contact.

Note This requires your **Options > Preferences > Call Transfers > When Dragging and Dropping or Double Clicking** option to be set to **Perform blind transfer**.

Consult Transferring Calls

Consult Transferring to a Dialed Number

To consult transfer a call to a dialed number using the keyboard, do the following:

Step 1 Answer a call or select the call in the Active Calls pane by pressing the F7 key.

Step 2 Type the destination number. The cursor is automatically placed in the Dial Box.

Step 3 Press **Enter** to make the enquiry call.

Step 4 After consulting with the destination, press **Enter** to complete the transfer.

To consult transfer a call to a dialed number using a mouse, do the following:

Step 1 Answer a call or select the call in the Active Calls pane by pressing the F7 key.

Step 2 Using the keyboard type the destination number. The cursor will automatically be placed in the Dial Box.

Step 3 Press **Enter** to make the enquiry call.

Step 4 Click **Transfer** to complete the transfer.

Consult Transferring to a Directory Contact

To consult transfer a call to a Directory Contact using the keyboard,

Step 1 Answer a call or select the call in the Active Calls pane by pressing the F7 key.

Step 2 Execute your directory search (see Searching the Directory for instructions).

Step 3 Use the up and down arrows to move change your selection within the list of results, otherwise continue to the next step.

Step 4 Press **Enter** to make the enquiry call.

Step 5 After the consult, press **Enter** to complete the transfer.

To consult transfer a call to a Directory Contact using the mouse:

Step 1 Answer a call or select the call in the Active Calls pane by pressing the F7 key.

Step 2 Execute your directory search (see Searching the Directory for instructions).

Step 3 Do one of the following:

- Double-click the required contact to initiate the transfer.
- Drag and drop the active call on the required contact.

Note This requires your **Options > Preferences > Call Transfers > When Dragging and Dropping or Double Clicking** option to be set to **Perform blind transfer**.

- Right-click the required contact and select **Consult**.

Step 4 Press **Transfer** to complete the transfer.

Holding Calls

To place an active call on hold using the keyboard, press **Page Down**.

To place an active call on hold using the mouse, do one of the following:

- Drag and drop the active call in the Calls in Progress pane.
- Right click the active call, and select **Hold** .
- Click the active call to select it, and click **Hold** from Call Control toolbar.

Retrieving Held Calls

To retrieve a held call using the keyboard, do the following:

Step 1 Press **F5** to select Calls In Progress pane.

Step 2 Select a call using the Up Arrow and Down Arrow keys.

Step 3 Press **Page Down** to retrieve the held call.

To retrieve a held call using the mouse, do one of the following:

- Double click the held call.
- Click the held call, and select **Retrieve** from the Call Controls toolbar.
- Right click the held call, and select **Retrieve** .
- Drag and drop the held call in the Active Calls pane

Muting Calls

To mute active calls, do the following:

- Using the keyboard, press **Ctrl+Q**.
- Using the mouse, click **Mute** .
- Using the mouse, right-click the active call and select **Mute** .

To take calls off of mute repeat the same action used to mute the call.

The console can be configured to automatically mute calls during the following scenarios:

- Searching the directory
- Dialing a number
- Changing directory tabs

Access the **Options > Preferences > Mute** tab to modify the preference

Note While a call is muted, the calling party will hear music on hold.

Parking Calls

Parking calls is like placing a call on hold, but for the purpose of another user being able to resume the call. When parking a call via Cisco Unified Attendant Console, any logged in user can retrieve the call. Additionally, internal contacts can retrieve the call by dialing the park extension.

To park an active call (talking state) using the keyboard, press **Home**.

To park an active call (talking state) using the mouse, do either of the following:

- Click **Park Call** .
- Drag and drop the active call on an available Park device.

Retrieving Parked Calls

To retrieve a parked call using the keyboard, dial the extension of the park device.

To retrieve a parked call using the mouse, do one of the following:

- Double-click the parked call.
- Drag and drop the parked call to the Active Calls pane.
- Right-click the parked call and select **Retrieve** from the menu.

Conferencing Calls

A Conference call enables you to add a third person to a call session.

While on an active call, to start conference with a third party using the keyboard, do the following:

Step 1 Select the contact/speed dial or dial the number you wish to add to the conference.

Step 2 Press **End**.

Step 3 Wait for the third party to answer and press **End** to join all three parties.

While on an active call, to start conference with a third party using a mouse, do the following:

Step 1 Select the contact/speed dial or dial the number you wish to add to the conference.

Step 2 Click **Start Conference** .

Step 3 Wait for the third party to answer and click **Conference** .

To leave the conference once established, using the keyboard, do the following:

Step 1 Use the Up and Down arrow to the select the Conference Controller within the Active Calls pane.

Step 2 Press **Enter** to clear the call.

To leave the conference once established, using the mouse, do any of the following:

Step 1 Double-click the Conference Controller within the Active Calls pane.

Step 2 Right-click the Conference Controller within the Active Calls pane, and select **Clear Call**.

Toggling Calls

With two active calls in progress, one held and one connected, you can toggle between them.

For example:

When a contact is called for consultation, the incoming call is put on hold. Once the destination accepts answers, you can do one of the following to toggle between the incoming caller and the destination:

- Right-click the incoming call in the Active Calls pane and choose **Toggle**.
- Press the **+** (plus) key. The incoming call that was held during consultation will become active.

Controlling Reverted Calls

Calls can be reverted back to the Calls in Progress pane for any of the following reasons:

- Invalid destination.
- Hold timeout (if configured, calls on hold for longer than a set duration will timeout).
- Transfer timeout (if configured, transferred calls that are not handled by the destination within a set duration will timeout).
- Park timeout (if configured, parked calls that are not handled within a set duration will timeout).
- Campon (if configured, camped calls will timeout if not handled within a set duration).

After moving the call to the Active Calls pane, your standard call controls are changed to **Reverted Call Controls**. The only difference between the Reverted Call Controls and standard Call Controls is that the actions are executed using the criteria of the original call. See the Call Controls Used on Reverted Calls table for a list of controls and their functions.

For example, if you had Blind Transferred a caller to a directory contact, and that directory contact failed to answer call. The call will revert back to the Calls in Progress pane. After resuming the call, you can right click the call and select Blind Transfer and the call will automatically be blind transferred to the previous destination. You could also press Delete to re-establish the blind transfer.

Table 6-1 summarizes the controls you can use on reverted calls.

Table 6-1 Call Controls Used on Reverted Calls

Control Name	Icon	Description
Clear Call		Clear an answered call.
Blind Transfer		Transfer the answered call to the extension from where the call was initially reverted.
Re-establish		Redo an action previously performed on the reverted call.
Hold with Notes		Attach notes to the current call before placing the call on hold.
Hold		Place the reverted call directly on hold for the same extension/contact the call was reverted from, without taking notes for the contact.
Contact Properties		Add or update details of the contact from which the call was reverted.

Table 6-1 Call Controls Used on Reverted Calls (continued)

Control Name	Icon	Description
Start Conference	☎	Consult and start conference with the contact the call was reverted from.
Camp on	☎	Transfer a call to a busy User.
Park Call	☎	Place the call on a Call Parking Device.

Re-establishing Calls

The Re-establish function enables you to repeat the previous call control action on an active reverted call by clicking **Re-establish** or pressing **Delete**. These actions include:

- Blind Transfer
- Camp on

Supplying FACs and CMCs

You may need to provide a Forced Authorization Code (FAC) and/or Client Matter Code (CMC) to perform an External Blind Transfer. The Administrator configures these codes through Cisco Unified Attendant Console Advanced Administration. If this is required during a consultation transfer you will see a dialog box on screen, simply enter the correct code and your call will be made.

Forced Authorization Code (FAC)

Often in call centers, agents are blocked from making consult transfers to external or international numbers. Forced Authorization Codes (FACs) enable agents to unblock these calls. When agents attempt external call transfers, the **Code Required** dialog box is displayed, into which they must enter the FAC before the call can continue. If they fail to enter a FAC, or enter an incorrect FAC, the call fails.

Client Matter Code (CMC)

Client Matter Codes are used to provide extra call logging facilities within Cisco Unified Communications Manager. This is used to log calls for different clients.

The concept of the CMC is that you must enter CMC Code before an external call or transfer can proceed. The call detail records are updated with the CMC code along with the call information. This can then be used later on to charge calls to different cost centers.

Forwarding Queues to Emergency Mode Destination

Cisco Unified Attendant Console Advanced enables you to set any queue to Emergency Mode. When queues are in Emergency Mode, all calls are automatically redirected to another destination: for example Night Service or Voicemail. These destinations are configured using Cisco Unified Attendant Console Advanced Administration.

To put a queue in Emergency Mode, do the following:

Step 1 Do one of the following:

- From the main menu, choose **Options > Emergency**.
- Select the Queues pane and press **Ctrl+E**.

The **Emergency** dialog box appears.

Step 2 For each queue to put in emergency mode, select it from the **Available Queues** list and move it to the **Emergency Queues** list by clicking >. Click >> to move all queues.

Note The **Available Queues** list contains only those queues for which an *Emergency destination* has been configured using Cisco Unified Attendant Console Advanced Administration.

Step 3 Click **OK**.

To take queues out of Emergency Mode, follow the same procedure, but select the queue from the **Emergency Queues** list and then move it back to the **Available Queues** list.

Sending Emails

When you forward a call to an extension and it is returned on time out, you have the option to send an email to the person to provide important information about the call. The shortcut key for sending email is **Ctrl+M**. Alternatively, you can select a contact with a right mouse click and from the **Contact** submenu there is an option to Send Email.

Note There has to be an email address in the Contact Details for the Cisco Unified Attendant Console Advanced to be able to function.

Log Collection

To collect logs:

Step 1 In the Console main menu, choose **Help > Collect Logs**.

The **Log Collector Tool** window appears.

Step 2 Either accept the default **Archive location and filename** or specify your own. The default path is to your computer desktop, and the default filename has the format:

<your_login_name>_<YYYYMMDD>_<HHMM>.zip

where *<YYYYMMDD>_<HHMM>* is the date and time that the Log Collector Tool was started.

Step 3 If you want a customized archive, select **Advanced** to display the **Options** to apply, and then select from the following (any chosen options are applied irrespective of whether **Advanced** is selected):

- **Password protected** - the archive file is open/move/delete protected using an internal password known only to Customer Support staff.
- **Include application screenshot** (selected by default) - a BMP file of current Console interface is included in the archive.
- **Include desktop screenshot** - a BMP file of your current desktop is included in the archive.
- **Include configuration files** (selected by default) - the Cisco Unified Attendant Console Advanced configuration files are included in the archive.
- **Include clipboard contents** - select this when you have an image on the clipboard, perhaps a screen capture of a dialog box or message that will help solve the problem.
- **Restrict date range** - collect logs only from the specified date range:
  - **Start** at 00.00.00 on the date specified
  - **End** at 23:59:59 on the date specified

Step 4 Click **Start**.

The archive ZIP file is created.

Console User Client with JAWS Quick Reference

This chapter provides quick reference for users using Cisco Unified Attendant Console Advanced with a JAWS script.

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Common Tasks

Logging In

Ctrl+I opens the login dialog box, with the focus in the Password field. Up Arrow takes you to your login name, which is blank initially but which remembers the last used name for each future login. Below Password is the extension field, which again is populated from the previous login.

Logging Out

Ctrl+O logs you out of the console, without any confirmation.

Confirming Your Current Status

At any point use **Insert+T** to check your status.

Answering Calls

Incoming calls are queued in the Queue Calls **(F8)** window. They are presented in priority order as determined by the system configuration.

The most common method of answering calls is to select the next call with the highest priority.

Step 1 Press the **Answer Next** key (plus + on the Number Pad).

The answered call moves to the Active Calls field. **(F7)**

Step 2 The script reads out the caller's details only – Routing Tag (identifying the call's queue) a name if available and/or the caller's number.

To repeat the details press **F7.**

Making Calls

Step 1 Select **F7** Active Calls.

Step 2 Using the keypad, enter the required number.

To delete a mis-typed digit press **Backspace.**

Step 3 To listen to the full dial number, press **Ctrl+Spacebar.**

Step 4 Press **Connect** key to end dialing **(Enter).**

Step 5 The call appears in the Active Calls field **(F7).**

Clearing Calls

Step 1 Select from within the Active Calls field **(F7)**

Step 2 Press the **Clear** key **(Enter).**

The call leaves the console.

Mis-Dialed Calls

Press the **Number Correction** key **(Backspace).**

Transferring Calls

Blind Transfer If Extension Is Known

With the call in the Active Calls field. **(F7)**

Step 1 Type the number of the extension. The number is read out as you type.

Step 2 Press the **Connect** key twice in quick succession to complete the transfer. **(Enter, Enter)**

The call leaves the console.

Blind Transfer Using a Directory Search

With the call in the Active Calls field. **(F7)**

Step 1 Press **F3** or simply start typing the contact to be searched.

The script tells you which field search field you are in.

Step 2 Start typing; the script reads out the letters.

Step 3 Press **Tab** to move to other search fields if required, for example **Lastname** and **Department**.

Step 4 When you are ready to commit the search press **Enter** (either on Number Pad or keyboard).

The script reads out the number of contacts returned and the details of the first contact.

Step 5 Press **DownArrow** to select the next contact on the list.

Step 6 When the correct contact is found, to find out more information if required, including the Line State, whether there are any Notes for the contact, their Presence from Cisco CUPS server or whether there are any Alternative Contacts configured use the **LeftArrow** to get to the beginning of the contact line and use the **RightArrow** to read out individual items.

Step 7 When ready with the correct contact selected press **Enter** twice to transfer the call.

The call leaves the console.

Retrieve On No Reply

If there is no reply from the destination extension, the call will return on time-out to the Call Progress field. **(F5)**

Step 1 Select within the Call Progress field. **(F5)**

Focus is on the call at the top of the list in **F5**. The script reads relevant details for the selected call

Step 2 Use **DownArrow** and **UpArrow** and press **F5** to find the required call.

Step 3 Press the **Retrieve** key. **(PageDown)**

The call returns to the Active Calls field. **(F7)**

Step 4 To repeat the details press **F7**.

The caller is in circuit.

Announced/Consult Transfer

The calling details are displayed in the Active Calls field. **(F7)**

Step 1 Search for your contact, or using the Number Pad type in the extension to transfer to,

Step 2 Press the **Connect** key once to dial. **(Enter)**

Step 3 Stay on the line to announce the call.

Step 4 Press the Connect key again to complete the transfer **(Enter)**

No Reply

During a consult transfer you can end the enquiry call and return to the original caller. press **Cancel Consultation** to return to the *calling* party (**Minus -**).

Toggling Between Two Active Calls

- Press **Toggle** to return to *calling* party. **(Plus +)**
- Press **Toggle** to return to *called* party. **(Plus +)**

Camping a Call on an Extension

Camp-On Calls Using a Consultation Transfer

With the relevant call selected within the Active Calls field. **(F7)**:

Step 1 Make a call to the extension that is currently busy.

A busy tone is heard, the call display window echoes the word **BUSY.**

Step 2 Press the **Camp-On** key. **(Alt+P)**

The call leaves the Console.

Camp-On Calls using a Blind transfer

Use this with the Preference setting to Automatically Camp-On calls if busy. With the relevant call selected within the Active Calls field **(F7),** make a Blind Transfer (**Enter**, **Enter**) to the extension that is currently busy. The call leaves the Console.

Holding and Retrieving Calls

Holding a Call

While in an Active Call call **(F7)**:

Step 1 Press the **Hold** key. **(PageDown)**

Nothing is read out at this point.

Step 2 Press **F5** to enter the Calls In Progress field.

The top call is highlighted in Call Progress field. (F5) and details from this call is read out.

Holding a Call with Notes

With an Active Call selected **(F7)**

Step 1 Press the **Hold with Notes** key. **(PageUp)**

Step 2 Type the note, use **Ctrl+Enter** to put a carriage return in the message.

Step 3 Press **Enter** when you have finished typing to Hold the call.

Step 4 Press **F5** to enter the Calls In progress field.

The top call is highlighted in Call Progress field. (F5) and details from this call is read out.

Step 5 If the script advises if there’s a note. Press **PageUp** to read the note.

Retrieving a Call

Step 1 Select the Call Progress field. **(F5)**

The top call is highlighted.

Step 2 Use **DownArrow** and **UpArrow** to select the correct call.

Step 3 Press the **Retrieve** key (**PageDown**).

The call returns to the Active Calls field(**F7**), and the caller is in circuit.

Re-establish a Call

This allows a call to be sent back to its intended destination after it has been recalled on a timeout from it’s transfer, park, camp on or hold.

Step 1 Press **F5** to access the Calls In Progress window.

Step 2 Select the call using the **DownArrow/UpArrow**.

Step 3 Press the Re-establish button **(Delete**).

Conference Calls

Three parties can be conferenced together.

With an Active Call selected:

Step 1 Search for a contact or type a number.

Step 2 Press the Conference key **(End).**

This puts the first call on hold, and makes an enquiry call to the destination.

Step 3 Once the destination answers, at any point you can start the conference **(End).**

There is three calls in Active calls area, one to each destination and the Conference controller. This is your call.

Step 4 To drop out of the conference clear your call using the (**End)** key.

Call Park

Place Call Into a Park Position

Step 1 Select the call to be placed on park from within the Active Calls field. **(F7)**

Step 2 Press the **Park** key **(Home)**.

The next available park position is used.

Step 3 Press **F9** to enter the Parking area.

The script immediately tells you where the last call was parked and this can be announced as required.

Retrieve Before Time Out

Step 1 Dial the park position number.

Step 2 Press the **Connect** key (**Enter**).

The call appears in the Active Calls field (**F7**), and the caller is in circuit.

Retrieve On Time Out

On timeout the call is presented to the Calls In Progress window (F5).

Step 1 Select within the Call Progress field. **(F5)**

Step 2 Press the **Retrieve** key. (**PageDown)**

The call appears in Active Calls Field (**F7**), and the caller is in circuit.

Using the Directory

Switching Between Directories

Step 1 Press **F3** to put the focus in the first search field of the last used Directory Group.

Step 2 To switch between Directory Groups use **Alt+*number*,** where *number* is the position of the Tab from the left. **Ctrl+Tab** moves through the tabs from left to right.

Performing a Search

Step 1 Begin a search, press **F3**

The name of the Directory tab and the active Search field is read out.

Step 2 Type search text or **Tab** to the required Search field. If you reach the end of the Search fields a notification is sounded.

Step 3 Press **Tab** if you wish to insert search text in other search field (optional).

AND searches are performed if entries are in more than one search field.

Step 4 Press **Enter** to start the search.

Browsing Through Results

Simple navigation:

- Move down through list of results – DownArrow
- Move up through list of results – UpArrow
- Advanced navigation (read individual cells)
- Move down through column – DownArrow
- Move up through column – UpArrow
- Move forward across a row – RightArrow
- Move back across a row – LeftArrow
- Read status icons – LeftArrow to the start of the contact and then read to the right with the RightArrow to read one item at a time

Status Icon Options

You can set the following options in any order, but should leave them in their default position together on the left side of the directory:

- Phone Status - read out when you select a contact:
  - Idle
  - Active
  - Ringing
  - Out of Service
- Notes - read out when you select a contact.
  - Says “Notes” if a note is set, and then reads out the note as applicable.
  - To edit or enter a note press **Ctrl+N**.
  - To read Contact Notes press **DownArrow**.
  - Press **Tab** followed by **DownArrow** to read the Contact Absent Note.
- Alternate Contacts
  - Says “Contact has Alternative Numbers” if true.
  - To find out more information press **F2** and **Tab** into the contacts. Once you have located the entry you want you can dial by pressing **Enter**.
- Presence (is set for either CUPS or Microsoft OCS, but NOT both) - read out when you select a contact (see below).

Presence Status (CUPS)

Unknown	There is no match for the User Profile in CUPS
Online	Contact is online and available
Away	Contact is online but is set to Away status
Offline	Contact is known but is not logged in

Presence Status (Microsoft OCS/LCS)

Online	The contact is online and can participate in conversations.
Busy	The contact is available but engaged in another activity.
Do Not Disturb	The contact has manually set their presence status to **Do Not Disturb**.
Busy (Urgent Interruptions Only)	The contact has manually set their presence status to **Do Not Disturb**.
Away	The contact’s computer has been idle for more than the idle time period setting; 15 minutes by default. The contact has manually set their presence status to **Away**.
Inactive	This contact may be available, but their computer has been idle for more than the idle time period setting; five minutes by default.

Busy (Inactive)	This contact is engaged in a meeting, but their computer has been inactive for the idle time period setting; 5 minutes by default.
Offline	The contact is not available because: • Communicator 2007 is not running on the contact's computer, or the contact has not signed-in. • The contact has blocked you from seeing their presence status.
Unknown	Communicator 2007 cannot determine the status of the contact

Lateral Searching (Ctrl+F2)

When a contact is selected in the Directory, you can search for related contacts based on a configured field, for example other people in the same department:

Step 1 Open the Lateral Search **(Ctrl+F2**).

Step 2 Select an Alternative contact from the selection displayed (**DownArrow/UpArrow**).

Step 3 Dial the contact **(Enter)** or Transfer **(Enter, Enter).**

Step 4 Press **Esc** to exit Lateral Search screen.

Configuring Lateral Search

To set the Preferred Lateral Search field you need to specify the criteria within the **Preferences**:

Step 1 Choose **Options > Preferences** (**Alt+O, P**).

Step 2 Use **UpArrow** and **DownArrow** through headings to the **Filter Search** tab.

Step 3 Select the field required from the drop down list. Select **None** to disable the feature.

Speed Dials

Speed Dial numbers and contacts are viewed in the F6 window.

Using Speed Dials

Step 1 Press **F6** to access Speed Dial pane.

Step 2 Use **UpArrow** and **DownArrow** to select the desired Speed Dial contact.

Step 3 Press **Enter** to dial.

Adding Speed Dials

Step 1 Press **F6** to access the Speed Dial pane.

Step 2 Press **Alt+F6** to **Add Speed Dial**.

Step 3 Select either a Private (available only to you, the default selection) or Public (available to all users) speed dial.

Step 4 Tab to enter the Number field. Type **Number**, **Name** and **Company Name** of the contact.

Step 5 Tab again to use the **OK** button.

Deleting Speed Dials

Step 1 Press **F6** to access the Speed Dial pane.

Step 2 Select the speed dial you want to delete using UpArrow and DownArrow.

Step 3 Press **Alt+D** to delete the Speed Dial.

Step 4 Press **RightArrow** to select **Yes** on the confirmation message.

Editing Speed Dials

Step 1 Press **F6** to access the Speed Dial pane.

Step 2 Use **UpArrow** and **DownArrow** to select the speed dial you want to edit.

Step 3 Press **Alt+S** to open the Edit window.

Focus is in the Private Speed Dial checkbox

Step 4 Make the relevant changes.

Step 5 Tab to the **OK** button and press **Enter**.

Using the Calls In Progress (F5) Area

This area contains calls that are being held or have timed out from operations, such as a transfer, call park, camp on, or Whisper Page Messages including responses.

To use the area:

Step 1 Press **F5.**

The top call is highlighted and the following information read out:

- Routing Tag
- Call for (if applicable) Name and Number
- Call From (Number)
- Status, for example No Reply, Held, Park Timeout
- Duration of the call within the F5 area
- Page response, if applicable

Step 2 Use **UpArrow** and **DownArrow** to read other call details out, pressing **F5** after each arrow to read the full information.

Useful Features

Dialing Copied Phone Numbers

After copying a number intended to dial out, press **Ctrl+V** or **Ctrl+Insert** from anywhere within the console window with the exception of a directory search text box. This pastes the dialable characters of the copied phone number in to the **Active Calls** dial box. You are now able to dial out to the pasted number.

Emergency Mode

You can put your call queues into Emergency mode if needed. Press **Ctrl+Shift+E** to activate those queues that have an Emergency overflow destination set. To deactivate Emergency mode, press **Alt+Shift+E**. If you press **Insert+T** to check your status, it shows that you are in emergency mode only if *all* of your queues are in that mode.

Unavailable

Make yourself unavailable to take calls by pressing **F10**. Pressing **F10** again makes you available.

Queue Unavailable

Press **Ctrl+F10** to make yourself unavailable to take incoming calls (you can still manage other parts of the application). Press **Ctrl+F10** again to become available again.

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