



## Managing Rule Sets and Rules

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- [About Rule Sets and Rules, page 15](#)
- [Task List for Setting Up a Rule Set, page 16](#)
- [Creating Rule Sets, page 16](#)
- [Adding Rules to Rule Sets, page 16](#)
- [Changing Rules, page 19](#)
- [Reordering Rules in Rule Sets, page 19](#)
- [Testing Rule Sets, page 20](#)
- [Deleting Rule Sets, page 21](#)
- [Enabling and Disabling Rule Sets, page 21](#)
- [Setting Basic Transfer Rules to Apply Personal Call Transfer Rules, page 23](#)

## About Rule Sets and Rules

Personal call transfer rules allow you to consolidate how and where you want to receive calls. Using the Personal Call Transfer Rules web tool, you can create rules to transfer and screen calls based on caller identification, time of day, and meeting schedules. You can also set Cisco Unity Connection to transfer selected calls to a destination or destination group.

You can change the characteristics of your rules as frequently as you need. (For example, you might create a rule that sends all calls from a co-worker to your mobile phone and later change the rule to send all calls except those from the co-worker to your mobile phone.)

Rules can be general, such as “Send all my calls to voice mail.” Or they can be specific, such as “Send calls from Jane Smith to my mobile phone if she calls between 9:00 am and 10:00 am, and screen the call.”

A rule set is a group of one or more rules that you can enable on certain days and for a range of dates, according to your schedule. When the date or day specified for a rule set becomes current, Connection activates the rule set and begins processing calls against it. Connection gives precedence to a rule set enabled for a range of dates over one enabled for day(s) of the week.

Connection uses the first rule in the set that matches the condition of an incoming call and applies it. Therefore, the way in which you order your rules within a set is important. In general, order rules from most specific to least specific.

To set up a rule set successfully, see the [“Task List for Setting Up a Rule Set”](#) section on page 16.

# Task List for Setting Up a Rule Set

To set up a rule set successfully, do the following tasks in the order listed.

1. Set up any personal contacts, caller groups, personal destinations, and destination groups that you plan to use in your rules. See the applicable sections:
  - “Managing Your Personal Contacts” section in the *User Guide for the Cisco Unity Connection Assistant Web Tool*
  - [“Managing Caller Groups” section on page 3](#)
  - [“Managing Destinations and Destination Groups” section on page 7](#)
2. Create a rule set. See the [“Creating Rule Sets” section on page 16](#).
3. Add rules to the rule set. See the [“Adding Rules to Rule Sets” section on page 16](#).
4. Order the rules correctly. See the [“Reordering Rules in Rule Sets” section on page 19](#).
5. If you want Connection to ring your extension before applying your transfer rules, check the check box on the Preferences > Rule Settings page in the Personal Call Transfer Rules web tool. See the [“Changing Rule-Processing Preferences” section on page 29](#).
6. Test the rule set, if applicable. See the [“Testing Rule Sets” section on page 20](#).
7. Change rules as necessary. See the [“Changing Rules” section on page 19](#).
8. Enable the rule set. See the [“Enabling and Disabling Rule Sets” section on page 21](#).
9. Configure the basic transfer rules to apply personal call transfer rules. See the [“Setting Basic Transfer Rules to Apply Personal Call Transfer Rules” section on page 23](#).

## Creating Rule Sets

You can record the name of a rule set by using the Media Master. Cisco Unity Connection uses this name when you access rule settings by phone.

### To Create a Rule Set

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|---------------|---|
| <b>Step 1</b> | In the Personal Call Transfer Rules web tool, from the Rules menu, click <b>View Call Transfer Rule Sets</b> .  |
| <b>Step 2</b> | On the Call Transfer Rule Sets page, click the <b>New Rule Set</b> icon below the menu bar.   |
| <b>Step 3</b> | On the Rule Set page, enter a name for the new rule set. Choose a name that applies to the situation and is easy to remember. (For example, a rule set named “Workweek” might be active Monday through Friday, while a rule set called “Africa Trip” might be active during the calendar dates of that trip.) |
| <b>Step 4</b> | On the Media Master, click <b>Record</b> and record the name of the rule set.   |
| <b>Step 5</b> | When you finish recording, click <b>Stop</b> .  |
| <b>Step 6</b> | Click <b>Save</b> .   |
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## Adding Rules to Rule Sets

Once you have created a rule set, add one or more rules to it.

**Caution**

Any personal contacts, caller groups, personal destinations, or destination groups that you plan to use in your rules must be created before you add rules. If they do not exist, you will not be able to set up your rules correctly.

### To Add a Rule to a Rule Set

- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, click **View Call Transfer Rule Sets**.
- Step 2** On the Call Transfer Rule Sets page, click the name of the rule set to which you want to add a rule.
- Step 3** On the Rule Set page, in the Transfer Rules section, click **Add Rule**.
- Step 4** On the Rule page, in the If the Call Is section, enter the applicable information that you want Connection to use when identifying calls or callers. At a minimum, you must choose a destination, destination group, or voice mail to which to transfer the incoming call.
- Use [Table 1](#) to determine values for the fields.

**Table 1** *Fields in the “If the Call Is” Section*

Field	Considerations
From	<p>Use with the Caller(s), Caller Group, Phone Number, and/or Call Source fields to set conditions for the caller identity in the rule.</p> <p>Check the <b>From</b> check box, and click <b>From</b> or <b>Not From</b> in the list, as applicable.</p>
Caller(s)	<p>Use to add callers to a rule.</p> <ol style="list-style-type: none"> <li>Check the <b>Caller(s)</b> check box, then click <b>Add Callers</b>.</li> <li>On the Find Contacts page, click the applicable tab, depending on whether you want to search the list of users in the Connection directory or your personal contacts list.</li> <li>You may be able to search for both users and system contacts in the Connection directory. System contacts are indicated by an asterisk (*) next to the name in the search results list.</li> <li>Enter a name or partial name, and click <b>Find</b>.</li> <li>Check the check box next to the caller you want to add to the rule. You can check multiple check boxes to add more than one caller at a time.</li> <li>Click <b>Add Users</b> or <b>Add Contacts</b>, as applicable.</li> <li>To remove a caller from the rule, select the name and click <b>Delete Selected</b>.</li> </ol>
Caller Group	<p>Use to add a caller group to a rule.</p> <p>Check the <b>Caller Group</b> check box, and click a caller group in the list. (Note that before you can use a caller group in a rule, you need to create the caller group.)</p>

**Table 1** *Fields in the “If the Call Is” Section (continued)*

Field	Considerations
Phone Number	<p>Use to add a phone number to a rule.</p> <p>Check the <b>Phone Number</b> check box, and enter the number that Connection will associate with the incoming call. Connection processes the rule only if the phone number of an incoming call matches exactly what you enter in the field. You can use the wildcard characters X and * to match more than one phone number:</p> <ul style="list-style-type: none"> <li>The X character matches any single digit in the range 0 through 9. For example, the pattern 9XXX matches the range of phone numbers from 9000 through 9999.</li> <li>The asterisk (*) character matches any sequence of digits. For example, the pattern 5556304* matches the phone numbers 5556304, 55563040, 55563041, 5556304100, and so forth.</li> </ul>
Call Source	<p>Use to include or exclude callers based on whether the caller can be identified by Connection as a known number (a Connection user, a Connection system contact, or a personal contact) or as an unknown phone number (an external caller), if applicable.</p> <p>Check the <b>Call Source</b> check box, and click <b>Known Number</b> or <b>Unknown Number</b> in the list, as applicable.</p>
Received Between	<p>Use to set the time period during which Connection applies the rule to your incoming calls.</p> <p>Check the <b>Received Between</b> check box, and click <b>Received Between</b> or <b>Not Received Between</b> in the list, as applicable. Choose an hourly range from the hour and minute lists.</p>
I Am in a Meeting	<p>Use to have Connection use your Microsoft Outlook calendar to determine whether you are in a meeting when it applies the rule to an incoming call. Connection considers you to be in a meeting when your Outlook meeting time is scheduled as Busy. Any meetings set as Tentative, Free, or Out of the Office are not considered by Connection.</p> <p>Check the <b>I Am in a Meeting</b> check box, and click <b>I Am In a Meeting</b> or <b>I Am Not in a Meeting</b> in the list, as applicable.</p> <p><b>Note</b> This feature is not available on all systems. Ask your Connection administrator whether it is available to you.</p>

- Step 5** In the Then Transfer the Call To section, enter the applicable information that you want Connection to use when transferring calls. For a rule to be valid, you must specify either a destination, destination group, or voice mail.

Use [Table 2](#) to determine values for the fields.

**Table 2** *Fields in the “Then Transfer the Call To” Section*

Field	Considerations
Destination	<p>Use to have Connection transfer calls to the destination you specify.</p> <p>Click <b>Destination</b>, then click the destination name in the list.</p> <p><b>Note</b> SMS and SMTP destinations do not appear in the Destination list. To be used in a rule, the devices must be in a destination group with at least one phone number.</p>
Destination Group	<p>Use to have Connection transfer calls to the destination group you specify.</p> <p>Click <b>Destination Group</b>, then click the destination group name in the list.</p>
Voice Mail	<p>Use to have Connection transfer calls directly to voice mail.</p> <p>Click <b>Voice Mail</b>.</p>

**Table 2**      **Fields in the “Then Transfer the Call To” Section (continued)**

Field	Considerations
Screen the Call	<p>Use to have Connection screen the incoming calls to which it applies the rule. (For details on call screening, see the “Changing Your Call Screening Preferences” section in the “Changing Your Call Transfer and Screening Preferences” chapter of the <i>User Guide for the Cisco Unity Connection Assistant Web Tool</i>.) Check the <b>Screen the Call</b> check box.</p> <p><b>Note</b> This option is available only if your Connection administrator has enabled screening options for you and there are screening options set on the Call Holding and Screening Options page in the Cisco Unity Assistant web tool.</p>

- Step 6** In the Preview section, click **Update Preview** to display a text version of the rule so you can confirm that it is correct before you add it to the rule set.
- Step 7** Click **Save** to add the rule to the rule set.
- Step 8** Repeat [Step 1](#) through [Step 7](#) for any additional rules you are adding to the set.

## Changing Rules

### To Change a Rule

- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, click **View Call Transfer Rule Sets**.
- Step 2** On the Call Transfer Rule Sets page, click the name of the rule set that contains the rule you want to change.
- Step 3** On the Rule Set page, in the Transfer Rules list, click the rule name.
- Step 4** On the Rule page, make your changes. Use [Table 1](#) and [Table 2](#) in the “Adding Rules to Rule Sets” [section on page 16](#) to determine values for the fields.
- Step 5** In the Preview section, click **Update Preview** to display a text version of the rule so you can confirm that your changed version is correct.
- Step 6** Click **Save**.

## Reordering Rules in Rule Sets

The order of rules in a rule set is important because Cisco Unity Connection processes the rules from the top of the list to the bottom, then applies only the first rule whose conditions are met by the incoming call.

If a rule set has more than one rule, arrange the rules from most specific to least specific to ensure that Connection applies the most specific rule to a call, rather than applying a more general rule to it.



**Tip**

To change the priority of only one rule in a set, make your change to that rule in the Transfer Rules list on the Rule Set page, and click Update Priority. All other rules in the rule set will be reprioritized accordingly.

**To Reorder Rules in a Rule Set**

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- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, click **View Call Transfer Rule Sets**.
- Step 2** On the Call Transfer Rule Sets page, click the name of the rule set.
- Step 3** On the Rule Set page, enter a number in the Priority column to specify the order in which you want Connection to process the rules in the set. (For example, to process the “Send all my calls to voice mail” rule first, enter 1; to process the “Send calls from Jane Smith to my mobile phone” second, enter 2.)
- Step 4** Click **Update Priority**. The rules are reorganized according to their priority and saved.
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## Testing Rule Sets

Use the Call Transfer Rule Tester tool to see how Cisco Unity Connection would transfer an incoming call based on the rule(s) in a set. You might choose to test a rule set after building it to see if the rule applies to a specific caller or to an incoming call that reaches you at a specific time of day.

The Call Transfer Rule Tester tool is also a good way to diagnose a call-forwarding problem. For example, if a call was not forwarded in a way that you expected, enter the name of the actual caller and the time of day and date when the call was placed, and the Rule Tester can help you figure out the part of the rule set that Connection would apply to the incoming call.

To get results with the Call Transfer Rule Tester, the rule set that contains the rule you are testing must be enabled or active.



**Note**

Contact your Connection administrator if you are unable to diagnose call-forwarding problems with the Call Transfer Rule Tester tool.

**To Test a Rule Set**

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- Step 1** In the Personal Call Transfer Rules web tool, from the Tools menu, click **Call Transfer Rule Tester**.
- Step 2** On the Call Transfer Rule Tester page, enter or choose the incoming-call conditions that you want to use for the test:
- Name or phone number of the caller. If you are testing for a known user (a user in the Connection directory or a personal contact), click **Select Caller** to add the user to the Rule Tester.
  - Time of day.
  - Calendar date.
  - Year.
  - Whether or not you are in a meeting.

To get accurate results with the Rule Tester tool, specify a date. If you do not specify a date, the rule is evaluated with the current date, which is the default.

You can combine the conditions in any way to test your rules. For example, you can specify the caller, time, date, and year. Or you can specify only the time of day and date.

**Step 3** Click **Test**.

If an enabled or active rule applies to the call conditions that you specified, Connection displays the rule.

If no enabled or active rule applies to the call conditions that you specified, Connection displays the message “No matching rule found: Transfer all calls to dialed number.”



**Tip**

When using the Call Transfer Rule Tester to diagnose why a call was not forwarded in a particular way, start by defining broad call conditions. For example, provide a name and date. If the rule applies to the broad conditions, begin to narrow the conditions to single out the reason why your rule did not apply to the incoming phone call.

## Deleting Rule Sets

### To Delete a Rule Set

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- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, click **View Call Transfer Rule Sets**.
- Step 2** On the Call Transfer Rule Sets page, check the check box next to the rule set you want to delete.
- Step 3** Click the **Delete Selected Rows** icon below the menu bar.
- If the rule set is active, you will receive an error message that the rule set cannot be deleted.
- Step 4** Click **OK** to delete the rule set.
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## Enabling and Disabling Rule Sets

Enabling a rule set means to set the days or date range that it will be active. Cisco Unity Connection uses the schedule to apply rules to your incoming phone calls. You can schedule the active period in advance in the Personal Call Transfer Rules web tool.

Disabling a rule set means making it ineligible to be active.

Connection allows more than one rule set to be enabled within the same time period. When more than one rule set is enabled, a set enabled within a range of dates takes precedence over a set enabled by days of the week. When the range of dates is no longer applicable, the set enabled by days of the week is restored. Multiple rule sets cannot be enabled on overlapping dates.

See the applicable section:

- [Enabling Rule Sets for a Range of Dates, page 22](#)
- [Enabling Rule Sets for Days of the Week, page 22](#)
- [Disabling Rule Sets, page 22](#)

## Enabling Rule Sets for a Range of Dates

To enable a rule set, you set the days or date range that it will be active. You can schedule several date ranges in advance. For example:

- Vacation rule set, enabled March 1 to March 8
- Work Travel rule set, enabled March 9 to March 11
- Workweek rule set, enabled March 12 to March 31

You cannot enable multiple rule sets with overlapping date ranges. Only the rule set enabled during the date range that includes the current date is active.

### To Enable a Rule Set for a Range of Dates

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- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, click **Enable Rule Sets**.
- Step 2** On the Enable Rule Sets page, in the Date Range section, click the rule set in the Rule Set column list that you want to enable. The check box in the Enabled column is checked automatically.
- Step 3** Set the applicable dates in the Start Date and End Date column lists.
- Step 4** To add another row, click **Add Date Range**, then repeat [Step 2](#) and [Step 3](#) to specify the date range for any additional rule sets.
- Step 5** Click **Save**.
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## Enabling Rule Sets for Days of the Week

Do the following procedure to enable a rule set for one or more days of the week (for example, every Tuesday, every weekday, or every weekend).

### To Enable a Rule Set for Days of the Week

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- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, click **Enable Rule Sets**.
- Step 2** On the Enable Rule Sets page, in the Days of Week section, click the rule set in the Rule Set column list that you want to enable for the applicable days of the week. The check box in the Enabled column is checked automatically.
- You can specify a rule set for one or more days of the week, or you can choose Daily to apply the rule set to every day of the week.
- Step 3** Click **Save**.
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## Disabling Rule Sets

### To Disable a Rule Set

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- Step 1** In the Personal Call Transfer Rules web tool, from the Rules menu, click **Enable Rule Sets**.



- Step 2** On the Enable Rule Sets page, uncheck the check box in the Enabled column.
  - Step 3** Alternatively, you can click **None** in the Rule Set column list.
  - Step 4** Click **Save**.
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## Setting Basic Transfer Rules to Apply Personal Call Transfer Rules

Personal call transfer rules are used only if the active basic rule—the standard, alternate or closed transfer rule—is set to apply personal call transfer rules instead of the basic settings. Once you have created and enabled personal call transfer rule sets, you must set the basic transfer rules to apply personal call transfer rules.

### To Set a Basic Transfer Rule to Apply Personal Call Transfer Rules

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- Step 1** In the Cisco Unity Assistant web tool, on the Preferences menu, click **Transfer and Screening**.
  - Step 2** In the Transfer Rule table, choose the basic transfer rule that you want to set to use personal call transfer rules.
  - Step 3** In the When This Basic Rule Is Active field, click **Apply Personal Call Transfer Rules**.
  - Step 4** Click **Save**.
  - Step 5** Repeat [Step 1](#) through [Step 4](#) for each additional basic transfer rule that you want to set to use personal call transfer rules.
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