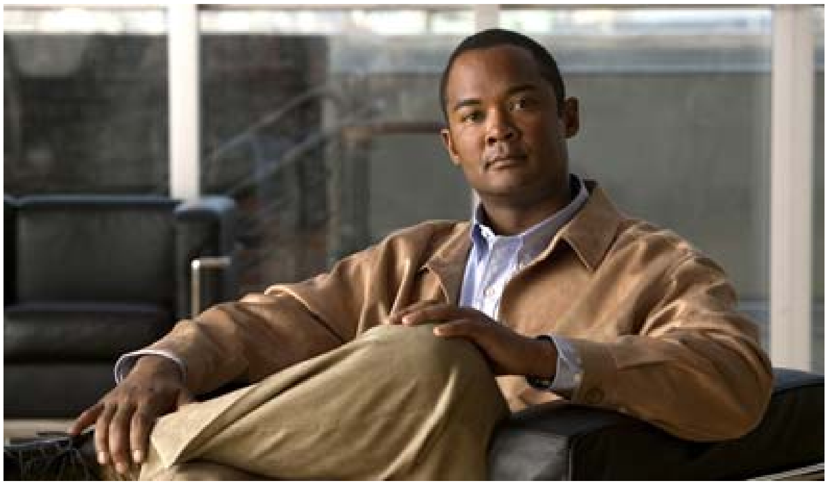

User Guide for the Cisco Unity Connection Personal Call Transfer Rules Web Tool

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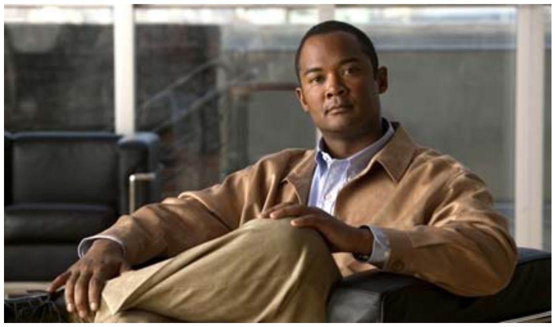

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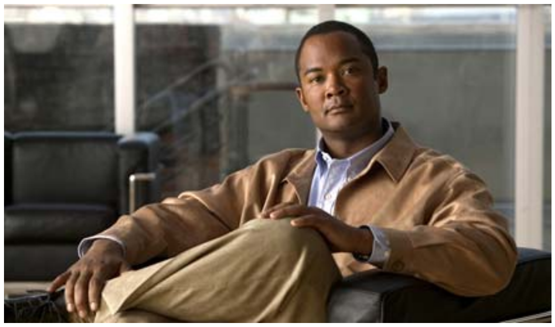


The Cisco Unity Personal Call Transfer Rules Web Tool

About the Personal Call Transfer Rules Web Tool

Cisco Unity Connection can transfer and screen your incoming calls according to rules you set up in the Cisco Unity Personal Call Transfer Rules web tool.

Connection uses a personal call transfer rule to transfer particular calls to you according to caller identity, time of day, and your meeting schedule, or to transfer calls to voicemail or to another phone number. You can set rules to transfer calls to a phone number, a series of phone numbers, or to an e-mail-based paging address, or to send SMS messages to an SMS device. Additionally, you can set up rules to screen some or all of your incoming calls.

You can build very simple personal call transfer rules—for example, to transfer a call from a single phone number to voice mail—or create more complex rules by using the following components:

Personal contacts list	Connection uses your personal contacts list to route incoming calls, as well as to place outgoing calls when you are using voice commands. **Note** You manage your personal contacts list in the Cisco Unity Assistant web tool.
Caller groups	You can organize callers into groups in order to apply one rule to multiple callers without having to recreate the rule multiple times. Caller groups can contain other Connection users, system contacts, and personal contacts.
Personal destinations	You can create a directory of contact phone numbers to which Connection can route incoming calls. (These destinations are in addition to notification devices.)
Destination groups	You can organize personal destinations and notification devices into groups so that Connection routes calls to each destination in the order listed until the phone is answered, the caller hangs up, or the last destination in the group is reached. You can specify the order of destinations in the group and the length of time that Connection waits for the phone to be picked up at each destination.

Once rules have been set up, you can enable them by phone or in the Personal Call Transfer Rules web tool.

Accessing the Personal Call Transfer Rules Web Tool

This section contains two procedures:

- To Access the Personal Call Transfer Rules Web Tool, page 2
- To Access Help for the Personal Call Transfer Rules Web Tool, page 2

To Access the Personal Call Transfer Rules Web Tool

Step 1 Go to the Cisco PCA logon page at **http://<Cisco Unity Connection server>/ciscopca**. (The URL is case sensitive.)

Timesaver Bookmark the Cisco PCA URL, so you do not have to enter the web address each time you want to access the Personal Call Transfer Rules web tool.

Step 2 Enter your username and password.

Step 3 If you cannot remember your Cisco PCA password, contact your Connection administrator for assistance.

Step 4 Click **Log In**.

Step 5 On the Cisco PCA Home page, click the **Personal Call Transfer Rules** link.

Step 6 When you are finished, click **Log Out** in the top right corner of any Personal Call Transfer Rules page.

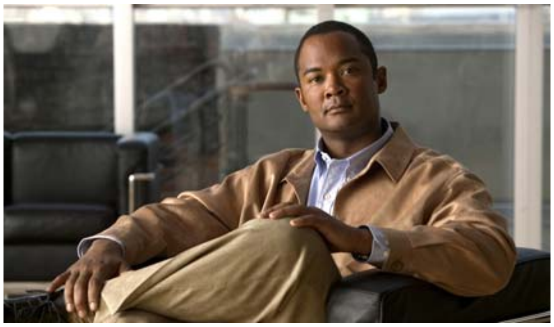
To Access Help for the Personal Call Transfer Rules Web Tool

Step 1 On any Personal Call Transfer Rules page, click the **Help** menu.

Step 2 From the Help menu, click the applicable link:

Contents	Provides a list of topics in Help.
Index	Provides a Help index.
This Page	Provides the Help topic applicable to the page you are viewing.

For help on an icon, hover the mouse over the icon until a tooltip is displayed.



Managing Caller Groups

About Caller Groups

By creating a caller group, you can apply one rule to multiple callers without having to recreate the rule several times. Caller groups contain multiple entries from your personal contacts list and the Cisco Unity Connection directory.

Using groups can help you organize callers in a number of ways. For example, you could create a caller group of your top-priority clients and co-workers. To ensure that these callers can reach you when you are in meetings, you would create a rule set with one rule that transfers calls from anyone in the group to your mobile phone during your meeting times and another rule that transfers other calls to voice mail.

Creating Caller Groups

The following types of callers can be members of caller groups:

Personal contacts	Callers who are entered in your personal contacts list.
System contacts	Callers who are in the Connection directory but who are not enabled to use Connection features and do not have a voice mailbox.
Connection users	Callers who are in the Connection directory, have a voice mailbox, and are enabled to use Connection features.

When a caller group contains a caller in the Cisco Unity Connection directory and the caller is later removed from the system by your Connection administrator, the caller will also be removed from your caller group.

To Create a Caller Group

Step 1 In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.

Step 2 On the Caller Groups page, click the **New Caller Group** icon below the menu bar.

Step 3 On the Caller Group page, enter a name for the caller group, and click **Save**.

Step 4 Click **Add Members**.

Step 5 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.

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.

Step 6 Fill in the remaining fields, as applicable to your search and click **Find**.

On this page, you can use the wildcard character * to search by partial name.

Step 7 Check the check box next to the name to add the contact or user to the caller group.

Step 8 Click **Add Users** or **Add Contacts**, as applicable. Connection adds the contact to the caller group and returns to the Caller Group page.

Step 9 Repeat Step 4 through Step 8 to add any additional users or contacts.

Step 10 On the Caller Group page, click **Save**.

Adding Callers to Caller Groups

You can add members to a caller group at any time.

To Add a Caller to a Caller Group

Step 1 In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.

Step 2 On the Caller Groups page, click the caller group name.

Step 3 On the Caller Group page, click **Add Members**.

Step 4 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.

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.

Step 5 Fill in the remaining fields, as applicable to your search and click **Find**.

On this page, you can use the wildcard character * to search by partial name.

Step 6 Check the check box next to the name to add the contact or user to the caller group.

Step 7 Click **Add Users** or **Add Contacts**, as applicable. Connection adds the contact or user to the caller group and returns to the Caller Group page.

Step 8 On the Caller Group page, click **Save**.

Deleting Callers from Caller Groups

You can remove members of a caller group at any time.

To Delete a Caller from a Caller Group

Step 1 In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.

Step 2 On the Caller Groups page, click the caller group name.

Step 3 On the Caller Group page, check the check box next to the name of the caller you want to delete. You can check multiple check boxes to delete more than one caller at a time.

Step 4 Click **Delete Selected**.

Changing the Names of Caller Groups

To Change the Name of a Caller Group

Step 1 In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.

Step 2 On the Caller Groups page, click the caller group name.

Step 3 On the Caller Group page, change the name of the group in the Name field.

Step 4 Click **Save**.

Deleting Caller Groups

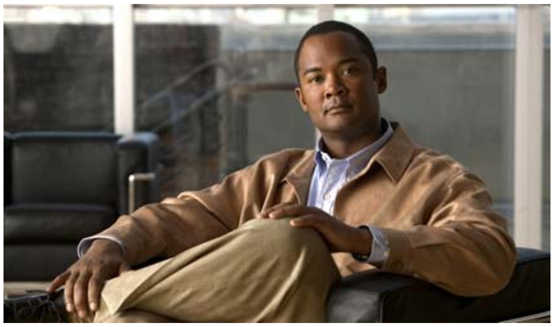
You cannot delete a caller group if it is used by a rule. Delete the caller group from the rule first, then delete the caller group.

To Delete a Caller Group

Step 1 In the Personal Call Transfer Rules web tool, from the Caller Groups menu, click **View Caller Groups**.

Step 2 On the Caller Groups page, check the check box next to the group that you want to delete. You can check multiple check boxes to delete more than one group at a time.

Step 3 Click the **Delete Selected Rows** icon below the menu bar.



Managing Destinations and Destination Groups

About Destinations

Destinations are phone numbers or e-mail addresses to which Cisco Unity Connection can transfer your incoming calls or send text messages as a part of personal call transfer rules. There are three types of destinations:

Phone	Phone destinations are phone numbers to which Connection can transfer incoming calls. Phone numbers associated with you in the Connection directory can be used as phone destinations. These might include your primary extension, voice mail access number, and company mobile phone number. Phone numbers in the directory are maintained by your Connection administrator. You can also create personal phone destinations, such as your personal mobile phone number, your home phone number (if it is not listed in the Connection directory), and phone numbers at which you can be reached during a business trip. You manage personal phone destinations in the Personal Call Transfer Rules web tool.
SMS	SMS destinations are phone numbers for SMS devices to which Connection can send a text message. The message uses the standard format “You have a call from <number or extension> at <time> on <date>.” (For example, “You have a call from 3233 at 15:16 on 04 October 2006.”) Note that for an SMS destination to be used in a rule, it must be added to a destination group that contains at least one phone destination. (SMS destinations do not appear in the Destination list on the Rule page when you are creating a rule.) SMS devices may be added for you by your Connection administrator, and you may be able to modify them in the Cisco Unity Assistant web tool. SMS devices do not need to be enabled in the Cisco Unity Assistant to be available as a destination in the Personal Call Transfer Rules web tool.
SMTP	SMTP destinations are e-mail addresses to which Connection can send a text message. The message uses the standard format “You have a call from <number or extension> at <time> on <date>.” (For example, “You have a call from 3233 at 15:16 on 04 October 2006.”) Note that for an SMTP destination to be used in a rule, it must be added to a destination group that contains at least one phone destination. (SMTP destinations do not appear in the Destination list on the Rule page when you are creating a rule.) SMTP devices may be created for you by your Connection administrator, and you may be able to modify them in the Cisco Unity Assistant web tool. SMTP devices do not need to be enabled in the Cisco Unity Assistant to be available as a destination in the Personal Call Transfer Rules web tool.

Creating Personal Destinations

To Create a Personal Destination

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destinations**.

Step 2 On the Destinations page, click the **New Destination** icon below the menu bar.

Step 3 On the Create Destination page, in the Name field, enter a name for the destination.

Step 4 In the Phone Number field, enter a phone number for the destination.

Use digits 0 through 9. Do not use spaces or parentheses between digits. For long-distance numbers, also include 1 and the area code.

You may not be able to enter certain phone numbers, or your phone system may require additional characters (for example, you may be required to enter an access code to dial outbound numbers). If you are experiencing difficulties with this setting, contact your Connection administrator.

Step 5 In the Rings to Wait field, enter the number of rings you want Connection to wait before transferring the call to voice mail or to the next destination in a destination group, depending on your other call transfer settings. The default value is four rings.

Step 6 If you have set this destination to forward calls to Connection, check the **Loop Detection Enabled** check box.

If you create a rule that transfers calls from Connection to a phone destination, you may inadvertently create a call-looping situation in which Connection forwards calls to your phone, and your phone consequently forwards the call back to Connection, and callers may never be able to reach you. Selecting this setting when you configure this type of destination to forward calls to Connection can help eliminate call-looping problems.

Step 7 Click **Save**.

Changing Personal Destinations

To Change a Personal Destination

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destinations**.

Step 2 On the Destinations page, click the name of the personal destination.

Step 3 On the Change Destination page, make the applicable changes and click **Save**.

Deleting Personal Destinations

You cannot delete a personal destination while it is being used in a destination group or in a rule. Delete the destination from the destination group or rule first, then delete the destination.

To Delete a Personal Destination

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destinations**.

Step 2 On the Destinations page, check the check box for the personal destination you want to delete. You can check multiple check boxes to delete more than one personal destination at a time.

Step 3 Click the **Delete Selected Rows** icon below the menu bar.

Changing the Rings-to-Wait Setting for Phone Destinations

For phone destinations, you can change the Rings-to-Wait setting on the Destinations page of the Personal Call Transfer Rules web tool.

To Change the Rings-to-Wait Setting for a Phone Destination

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destinations**.

Step 2 On the Destinations page, in the Rings to Wait column, enter the new value for the number of rings you want Connection to wait before transferring the call to voice mail or to the next destination in a destination group.

Step 3 Click **Update**.

Changing the Loop-Detection Setting for Destinations

For phone destinations other than your primary extension, you can use the Loop Detection Enabled setting to indicate when you have configured a phone to forward calls to Cisco Unity Connection. For example, you may configure your mobile phone to forward all calls to Connection to store all of your voice messages in Connection. If you then create a rule that transfers calls from Connection to your mobile phone, you may inadvertently create a call-looping situation in which Connection forwards calls to your mobile phone, and your mobile phone consequently forwards calls back to Connection, and callers may never be able to reach you.

Selecting this setting can help to eliminate the call-looping problem. If calls seem to be transferring from the phone destination to Connection and then back to the phone, Connection will either transfer the call to the next assigned device (if you have created a destination group) or transfer the call to voice mail if there are no additional destinations defined.

Note When this setting is enabled, you can expect to hear a slight delay as Connection transfers the call to the next destination in the destination group, or to voice mail.

To Change the Loop-Detection Setting for a Phone Destination

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destinations**.

Step 2 If you have set this destination to forward calls to Cisco Unity Connection, check the **Loop Detection Enabled** check box.

Step 3 Click **Update**.

About Destination Groups

Destination groups contain multiple destinations arranged in a sequence and stored under a single group name.

For example, to ensure that you receive calls from a specific personal contact, you might create a destination group with your primary extension, mobile, and home phone numbers, then create a rule that tells Cisco Unity Connection to transfer calls from the personal contact to the destination group. To be used in a rule, a destination group must contain at least one phone destination.

When a call is transferred to a destination group, Connection tries the destinations in the order listed until a phone is answered, until the caller leaves a voice message or hangs up, or until the last destination in the group is reached. If the group contains an SMS or SMTP destination, Connection sends the device a text message about the call.

If a destination is not answered, Connection prompts the caller to press 1 to continue waiting while it tries the next destination or to press 2 to leave a voice message. Connection waits for a phone to be answered based on the specified number of rings, which is set in the Rings to Wait field when you create a destination. If you do not specify a number of rings, Connection uses the default value of four rings. You can change the Rings to Wait setting anytime after you create a destination.

When Connection runs out of destinations, the call is forwarded to your default phone number or to the primary extension in the destination group, which is typically your primary extension.

Creating Destination Groups

You can add any of your destinations to a destination group. You can also add a destination to more than one destination group. A destination group must contain at least one phone number.

The order of destinations within a group is important because Cisco Unity Connection dials the destinations from top to bottom as they appear in the list. After you add destinations to a group, you may need to reorder them to suit your needs.

To Create a Destination Group

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destination Groups**.

Step 2 On the Destinations Groups page, click the **New Destination Group** icon below the menu bar.

Step 3 On the Destination Group page, enter the name of the group.

Step 4 Click **Save**.

Step 5 On the Destination Group page, click **Add Destinations**.

Step 6 On the Add Destinations page, check the check box next to the destination that you want to add to the group. You can check multiple check boxes to add more than one destination at a time.

Step 7 Click **Add Destinations**.

Step 8 On the Destination Group page, enter a number in the Priority column to specify the order in which you want Connection to try the destinations in the group. (For example, to call your mobile phone first and your home phone second, enter 1 for your mobile phone and 2 for your home phone.)

Step 9 Click **Save**.

Changing Destination Groups

You can change the group name, add or delete destinations from the group, and change the priority order of the destinations in the group.

To Change a Destination Group

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destination Groups**.

Step 2 On the Destination Groups page, click the name of the group.

Step 3 On the Destination Group page, change the group name or change the priority order of the destinations in the group.

Step 4 Click **Add Destinations** to add another destination to the group. To remove a destination from the group, click the check box next to the destination name to select it and click **Delete Selected**.

Step 5 Click **Save**.

Deleting Destinations from Destination Groups

The last phone destination cannot be deleted from a destination group if that will result in the group having only SMS or SMTP destinations.

To Delete a Destination from a Destination Group

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destination Groups**.

Step 2 On the Destination Groups page, click the name of the group.

Step 3 On the Destination Group page, check the check box for the destination you want to delete from the group. You can check multiple check boxes to delete more than one destination at a time.

Step 4 Click **Delete Selected**.

Deleting Destination Groups

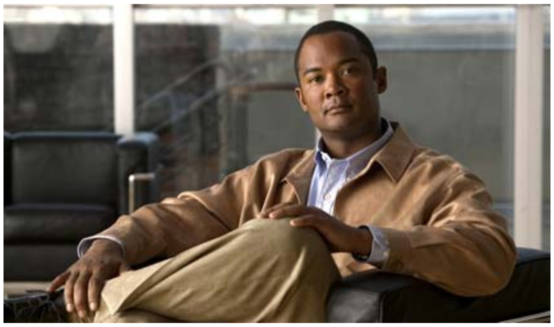
You cannot delete a destination group while it is used in a rule. Remove the destination group from the rule first and then delete the destination group.

To Delete a Destination Group

Step 1 In the Personal Call Transfer Rules web tool, from the Destinations menu, click **View Destination Groups**.

Step 2 On the Destination Groups page, check the check box for the group you want to delete. You can check multiple check boxes to delete more than one destination group at a time.

Step 3 Click the **Delete Selected Rows** icon below the menu bar.



Managing Rule Sets and Rules

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 25.
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

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 **New Rule Set** icon below the menu bar.

Step 3 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.)

Step 4 On the Media Master, click **Record** and record the name of the rule set.

Step 5 When you finish recording, click **Stop**.

Step 6 Click **Save**.

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	Use with the Caller(s), Caller Group, Phone Number, and/or Call Source fields to set conditions for the caller identity in the rule. Check the **From** check box, and click **From** or **Not From** in the list, as applicable.
Caller(s)	Use to add callers to a rule. **a.** Check the **Caller(s)** check box, then click **Add Callers**. **b.** 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. **c.** 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. **d.** Enter a name or partial name, and click **Find**. **e.** 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. **f.** Click **Add Users** or **Add Contacts**, as applicable. **g.** To remove a caller from the rule, select the name and click **Delete Selected**.
Caller Group	Use to add a caller group to a rule. Check the **Caller Group** 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.)

Table 1 Fields in the "If the Call Is" Section (continued)

Field	Considerations
Phone Number	Use to add a phone number to a rule. Check the **Phone Number** 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: • 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. • The asterisk (*) character matches any sequence of digits. For example, the pattern 5556304* matches the phone numbers 5556304, 55563040, 55563041, 5556304100, and so forth.
Call Source	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. Check the **Call Source** check box, and click **Known Number** or **Unknown Number** in the list, as applicable.
Received Between	Use to set the time period during which Connection applies the rule to your incoming calls. Check the **Received Between** check box, and click **Received Between** or **Not Received Between** in the list, as applicable. Choose an hourly range from the hour and minute lists.
I Am in a Meeting	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. Check the **I Am in a Meeting** check box, and click **I Am In a Meeting** or **I Am Not in a Meeting** in the list, as applicable. **Note** This feature is not available on all systems. Ask your Connection administrator whether it is available to you.

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	Use to have Connection transfer calls to the destination you specify. Click **Destination**, then click the destination name in the list. **Note** 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.
Destination Group	Use to have Connection transfer calls to the destination group you specify. Click **Destination Group**, then click the destination group name in the list.
Voice Mail	Use to have Connection transfer calls directly to voice mail. Click **Voice Mail**.

Table 2 Fields in the "Then Transfer the Call To" Section (continued)

Field	Considerations
Screen the Call	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 *User Guide for the Cisco Unity Connection Assistant Web Tool*.) Check the **Screen the Call** check box. **Note** 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.

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

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.

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

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

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.

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

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**.

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

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**.

Disabling Rule Sets

To Disable a Rule Set

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**.

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

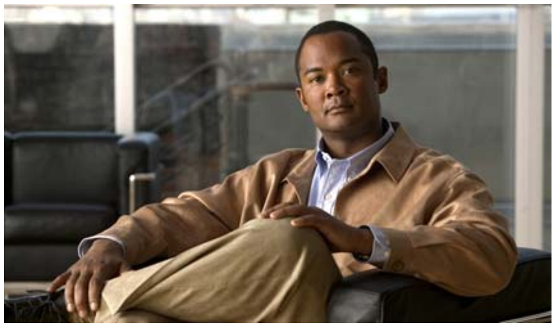
Step 1 In the Cisco Unity Assistant web tool, on the Preferences menu, click **Transfer and Screening**.

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.



Changing Rule-Processing Preferences

You can enable and disable the processing of personal call transfer rules, and you can choose whether to have Cisco Unity Connection always ring the dialed extension first, before processing any active personal rules.

If you choose not to have Connection ring the dialed extension first, direct and indirect calls may be handled differently:

Direct calls	These calls ring the extension. If there is no answer, the call is routed to Connection, where personal call transfer rules are applied.
Indirect calls	These calls are routed through Connection, and personal call transfer rules are applied without ringing the extension.

Direct calls are those that dial your phone directly—for example when another Connection user dials your extension or when an outside caller dials your direct line, if you have one. Indirect calls are those that are routed to you from the Connection system, for example, from callers using the directory to reach you.

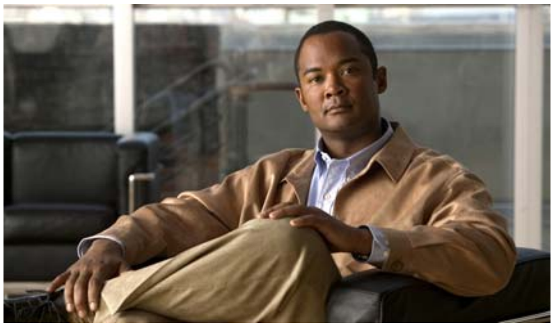
To Change Rule-Processing Preferences

Step 1 In the Personal Call Transfer Rules web tool, from the Preferences menu, click **Rules Settings**.

Step 2 Check one of the following check boxes, as applicable:

Disable All Processing of Personal Call Transfer Rules	When checked, all personal call transfer rule sets are disabled and are not considered by Connection when processing incoming calls. Incoming calls are routed to the dialed extension. **Note** Existing rule sets are not deleted when the sets are disabled.
Always Ring Primary Extension Before Applying Personal Call Transfer Rules	When checked, Connection rings the primary extension first before applying any rule sets, regardless of whether the incoming call is a direct or indirect call. **Tip** If your phone is set to Call Forward Answer, check this check box to achieve consistent behavior when callers dial you directly and when callers dial your number through Connection. Your primary extension will always ring before Connection tries to locate you at other destinations. If you do not want your primary extension to ring at all, uncheck this check box and set the Call Forward Answer setting on your phone to Cisco Unity Connection.

Step 3 Click **Save**.



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