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Welcome

This guide provides you with the instructions you need to get up and running with the Avaya Aura™ Application Server 5300 (AS 5300) Personal Agent.

This guide includes the following sections:

- “Getting started with your Personal Agent” on page 17
- “Managing Click to Call” on page 25
- “Managing your preferences” on page 29
- “Managing Routes” on page 57
- “Managing your Address Book” on page 73
- “Managing Call Logs” on page 69
- “Managing Uniform Call Distribution” on page 83
- “Managing Assistant Console and Services” on page 95
- “Managing Call Pickup” on page 101
- “Managing Hunting” on page 107
- “Understanding address book search criteria” on page 111
- “Terms you should know” on page 113

Topics in this section include the following:

- “Your Avaya Aura™ AS 5300 Personal Agent” on page 10
- “New in this release” on page 10
- “Personal Agent services and features” on page 14
- “Audience” on page 14
- “Text and graphic conventions” on page 15
- “Related publications” on page 15
- “How to get help” on page 15
Your Avaya Aura™ AS 5300 Personal Agent

The Avaya Aura™ AS 5300 Personal Agent is a feature-rich web portal. Using the Personal Agent, you can view, manage, and configure services to your personal preferences. Moreover, you can perform these functions with a standard web browser.

The Personal Agent is your own communications concierge, ensuring that your calls are delivered wherever and whenever you like.

This document describes all the features supported by the Personal Agent. However, your system may not support all the features. For more information on supported features, contact your system administrator.

New in this release

This section describes what’s new in the Avaya Aura™ Application Server 5300 Personal Agent User Guide (NN42040-105) for Avaya Aura™ Application Server 5300 Release 2.0.

Features

The following sections describe the impacts of the following features:

- “Personal Agent Rejuvenation Program” on page 11
- “Multilevel Precedence and Preemption Enhancements” on page 11
- “Vertical Service Code” on page 11
- “Assistant support” on page 11
- “Uniform Call Distribution” on page 12
- “Call Pickup” on page 12
- “Hunting and Hunt Groups” on page 12
- “Caller Name presentation” on page 12
- “Presence Watch authorization” on page 13
Personal Agent Rejuvenation Program

This feature makes many changes to the user interface. The new Personal Agent improves the user experience and feature set. Changes include enhancements to the following chapters and sections:

- “Managing Click to Call” on page 25
- “Managing your Address Book” on page 73
- “Managing Routes” on page 57
- “Managing Assistant Console and Services” on page 95
- “Personal Agent portlets” on page 23
- “Configuring My Times date and time ranges” on page 35

Updates were made to “Before you begin” on page 17 for updated hardware and software requirements.

Multilevel Precedence and Preemption Enhancements

This feature provides support for Call Forward variants. See “Vertical Service Code” on page 117 and “Viewing Vertical Service Codes prefixes” on page 51.

Vertical Service Code

This feature provides support for Vertical Service Codes. See “Vertical Service Code” on page 117 and “Viewing Vertical Service Codes prefixes” on page 51.

Assistant support

Assistant support enables you to designate other Application Server 5300 users to act as primary and alternate assistants. Assistants can monitor, transfer, or route incoming and outgoing calls for the assisted user from the Assistant Console. For more information, see “Managing Assistant Console and Services” on page 95.
Uniform Call Distribution

Uniform Call Distribution (UCD) allows businesses to improve call-completion rates by matching incoming calls to available answering locations. It allows for an even distribution of incoming calls to a Listed Directory Number (LDN) or Uniform Resource Indicator (URI) over a group of subscribers associated with that LDN or URI. This group of subscribers is called a Uniform Call Distribution (UCD) group. Each subscriber in the UCD group has its own directory numbers or URI. For more information, see “Managing Uniform Call Distribution” on page 83.

Call Pickup

Call Pickup allows a user to answer a call that is ringing on another user’s device, as long as both users belong to the same Call Pickup group. Call pickup allows calls to be answered more efficiently, and provides better call handling. For more information, see “Managing Call Pickup” on page 101.

Hunting and Hunt Groups

Hunting can improve call-completion rates by clustering users into groups called Hunt groups. Hunt groups are a series of users organized so that if the first group member is busy, the next group member is hunted and so on until a member of the group with no active call is found and can answer the call. For more information, see “Managing Hunting” on page 107.

Caller Name presentation

Caller Name Presentation makes the remote party identity display consistently in the Avaya Aura™ AS 5300 UC Client. This adjustment applies to all modes of the AS 5300 UC Client. If a match in the Personal Address Book is found, the remote user nickname displays everywhere that it is applicable:

- session window title
- under the user picture
- session window tooltips
- task bar
- chat window
- To and From field in call logs (for outgoing and incoming calls)
For more information, see “Managing the contacts in your Personal Address Book” on page 75.

Presence Watch authorization

Presence Watch Authorization provides the ability for users to enable an authorization process when a watcher wants to see the user’s status. Until the user approves the request, the watcher’s request remains in a pending state. For more information, see “Viewing and modifying Presence” on page 45.

XMPP Gateway

This feature provides the ability for the Application Server 5300 to interact with an Extensible Messaging and Presence Protocol (XMPP) gateway connecting SIP subscribers to other available external communities for IM and Presence functions. For more information, see “Viewing and modifying XMPP Gateway credentials” on page 54 and “Adding a contact” on page 75.

Other changes

The document is reorganized to reflect the Personal Agent user interface, including a separate chapter for each portlet.

Application Server 5300 Release 2.0 also supports the Avaya Aura™ AS 5300 Office Client, which is a plug-in for Microsoft Office. For information on the AS 5300 Office Client, see Avaya Aura™ Application Server 5300 Office Client User Guide (NN42040-114).

Revision history

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<th>Description</th>
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<td>December 2011</td>
<td>Standard 02.04. This document is issued to support Avaya Aura™ Application Server 5300 Release 2.0. Changes were made to procedures in “Managing Click to Call” on page 25.</td>
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<tr>
<td>July 2010</td>
<td>Standard 02.03. This document is issued to support Avaya Aura™ Application Server 5300 Release 2.0. Changes were made in procedures in “Viewing and modifying your Vertical Service Codes” on page 49, “Modifying Call park” on page 54, as well as button changes in a number of procedures in “Managing your preferences” on page 29.</td>
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Personal Agent services and features

The Personal Agent solves the problem of having a different contact number for your office phone, home phone, mobile phone, and other communications devices. With the Personal Agent, you can direct incoming calls to ring all of these devices at the same time or in a sequence.

Personal Agent features allow you to

- define how incoming calls are treated
- view and customize your personal information and services (including viewing the presence of another user in your network)
- manage, track, and maintain key contact information
- establish a call between you and another contact
- start the Avaya Aura™ AS 5300 Web Client from the Personal Agent

Audience

This guide is intended for subscribers of the Personal Agent services and features. Avaya recommends that you keep the Personal Agent open while you follow the steps described in this guide.

Screen captures in this guide show Internet Explorer as the default browser. If you use another browser, the screen can look different.
Text and graphic conventions

This guide uses the following text conventions:

**bold text** Indicates the command key or link you need to press or click.

Examples: Press **Enter**, Click **Ok**

*italic text* Indicates new terms and document titles for reference.

Screen captures in this guide show Internet Explorer as the default browser. However, if you are using another browser (for example, Firefox), your screen can look slightly different.

Related publications

Other publications related to the Personal Agent include:

- *Avaya Aura™ Application Server 5300 UC Client User Guide* (NN42040-107)
- *Avaya Aura™ Application Server 5300 Office Client User Guide* (NN42040-114)

How to get help

For service issues, contact your local support or Information Services team.
Getting started with your Personal Agent

This section describes how to use your Personal Agent.

Topics in this section include:

- “Before you begin” on page 17
- “Hardware and software requirements” on page 18
- “Accessing the Personal Agent” on page 20
- “Personal Agent log on” on page 19
- “Navigating the Personal Agent interface” on page 22
- “Exiting the Personal Agent” on page 24
- “Starting the AS 5300 Web Client” on page 24
- “Using the online Help” on page 24

Before you begin

You need the following items before you use the Personal Agent:

- Uniform Resource Locator (URL) to access the Personal Agent
- username and password for logon (provided by your system administrator)
- PC that has the required minimum hardware and software, as described in “Hardware and software requirements” on page 18
- internet access and a connection that meets the minimum transmission speed requirements, as described in “Hardware and software requirements” on page 18
Hardware and software requirements

The following sections describe

- “Minimum hardware and software requirements” on page 18
- “Recommended hardware and software requirements” on page 19

Tip: Disable pop-up blockers when using the Personal Agent to ensure that the pop-up windows associated with the Personal Agent appear on your screen.

Minimum hardware and software requirements

Before you begin using the Personal Agent, your PC must have the following hardware and software:

- Pentium II 450 Megahertz (MHz) processor
- The minimum memory requirements of your browser with Adobe Flash Player 9 must be met. For more information, see your browser documentation.
- This client does not require additional hard drive space. Local caching of Web pages is performed by your Web browser. For more information about the minimum disk space requirements, see your browser documentation.
- mouse (optional)
- 640x480 pixels @8 bpp (256 colors) VGA graphics card
- Windows 2000, Windows XP, or Windows Vista
- Direct Subscriber Link (DSL), cable modem, or Local Area Network (LAN) connection
- Adobe Flash Player 9
- Internet Explorer 7.0 or Firefox 3.6
- cookies and javascript enabled

The AS 5300 Web Client has additional minimum hardware requirements, as discussed in *Avaya Aura™ Application Server 5300 UC Client User Guide* (NN42040-107).
Recommended hardware and software requirements

- Pentium III 1 Gigahertz (GHz) processor
- The minimum memory requirements of your browser with Adobe Flash Player 9 must be met. For more information, see your browser documentation.
- This client does not require additional hard drive space. Local caching of Web pages is performed by your Web browser. For more information about the minimum disk space requirements, see your browser documentation.
- mouse (required)
- 1024x768 @24bpp VGA graphics card
- Windows 2000, Windows XP, or Windows Vista
- DSL, cable modem, or LAN connection
- Internet Explorer 7.0 or Firefox 3.6
- cookies and javascript enabled

The AS 5300 Web Client has additional minimum hardware requirements, as discussed in Avaya Aura™ Application Server 5300 UC Client User Guide (NN42040-107).

Personal Agent log on

You must log on to the Personal Agent before you can perform available functions.

**Tip:** Remember that your session can time out due to inactivity. Your system administrator defines the maximum number of minutes a session can be idle before you are forced to reauthenticate.

Logging on to the Personal Agent takes the following steps:

1. "Accessing the Personal Agent" on page 20
2. "Acknowledging the pre-login banner" on page 20
3. "Logging on to the Personal Agent" on page 21
4. "Acknowledging the post-login banner" on page 21
5  “Acknowledging the last log on information” on page 22

Accessing the Personal Agent

To access the Personal Agent

1 Start your Web browser.

2 To directly access the Personal Agent, enter the Personal Agent URL (provided by your service provider or system administrator) in your Web browser.
   OR
   Through your AS 5300 UC Client, select Tools, Personal Agent.
   OR
   Through your AS 5300 Office Client, select Multimedia, Agent.

Acknowledging the pre-login banner

After you access the Personal Agent login window, a pre-login banner appears, if configured by your system administrator. You must acknowledge the terms of the pre-login banner by selecting the check box and clicking Continue.

You cannot access Personal Agent functionality unless you acknowledge the pre-login banner. The pre-login banner is presented only if the system administrator configures it.

After you time out or log out of the Personal Agent, you see the pre-login banner instead of the login screen.

When you access the Personal Agent through the AS 5300 UC Client, AS 5300 Office Client, or Provisioning Client, you do not see the pre-login or post-login banners.
Logging on to the Personal Agent

**Warning:** Your system administrator can implement a lockout duration after the maximum number of failed log on attempts is reached. For more information, contact your system administrator.

To log on to the Personal Agent, perform the following steps.

1. Enter your user name (for example: you@yourcompany.com) and password in the Personal Agent Login window.

2. Click Login.
   After you log on, the Personal Agent Home page or the Post-login banner appears.

3. If you are prompted to change your initial password, enter the required fields and click Save.

### Acknowledging the post-login banner

After successfully logging on to the Personal Agent, a post-login banner appears, if configured by your system administrator. Otherwise, the Quick Start window displays. You cannot access Personal Agent functions until you acknowledge the post-login banner by selecting the check box and clicking on the Continue button. If you click on the logout button, the Personal Agent is logged off.

When you access the Personal Agent through the AS 5300 UC Client, AS 5300 Office Client, or Provisioning Client, you do not see the pre-login or post-login banners.
Acknowledging the last log on information

After successfully logging on to the Personal Agent, the Last Updated window may appear, if configured by your system administrator. Otherwise, the Quick Start window displays.

The Last Updated window displays the following information:
- date of last successful log on and IP address
- date of last failed log on
- number of failed log on attempts since the last successful log on
- date of last data update made you or your system administrator

You acknowledge the information by clicking the OK button. The Quick Start window displays.

Navigating the Personal Agent interface

The Personal Agent main page is always your starting point to access all the services and features of the Personal Agent. Use the maximize and minimize icons to open and close the various portlets. Depending on the services assigned to you and your status as either an administrator or an agent, the Personal Agent appears. The following figure shows a typical Personal Agent main page.

Figure 1  Personal Agent main page
Personal Agent portlets

Depending on the services assigned to you, the following portlets are available on the Personal Agent:

- Click To Call: Use this portlet to make calls. See “Managing Click to Call” on page 25 for more information.
- Preferences: Use this portlet to manage your preferences, such as personal information, IP Deskphone, Meet Me Conferencing, and Unified Communications. See “Managing your preferences” on page 29 for more information.
- Routes: Use this portlet to route your incoming calls. See “Managing Routes” on page 57 for more information.
- Address Book: Use this portlet to manage your Global and Personal Address Book, to add or delete contacts and groups, to e-mail contacts, and to call your contacts directly from the address book. See “Managing your Address Book” on page 73 for more information.
- Call Logs: Use this portlet to view your incoming and outgoing calls, to add contacts to your address book, and to place calls directly from the Call Logs portlet. See “Managing Call Logs” on page 69 for more information.
- Uniform Call Distribution: Use this portlet to see the details of Uniform Call Distribution services and to modify group and agent properties. See “Managing Uniform Call Distribution” on page 83 for more information.
- Assistant Console Service: Use this portlet to designate other Application Server 5300 users to act as primary and alternate assistants for your calls. Assistants can monitor, transfer, or route incoming and outgoing calls for you. As an assistant, you use this portlet to manage your assisted users and the assigned routes. See “Managing Assistant Console and Services” on page 95 for more information.
- Call Pickup: Use this portlet to configure and modify call pickup settings, as a Call Pickup Group Administrator or a subscriber. See “Managing Call Pickup” on page 101 for more information.
- Hunting: Use this portlet to configure and modify Hunting settings, as a Hunt Group Administrator or an agent. See “Managing Hunting” on page 107 for more information.
Exiting the Personal Agent

To exit the Personal Agent, click Logout at the top right of any page on which you are working.

Starting the AS 5300 Web Client

To start the AS 5300 Web Client from the Personal Agent, click Download Web Client on the top right corner of the Personal Agent.

Using the online Help

There are several ways that you can access Personal Agent help:

- online help: Click Help, at the top right of any page, to view a PDF-based user guide. The online user guide provides:
  - a table of contents with hypertext links
  - procedures that help you use the Personal Agent
  - an search method within the document
- rollover help: help text that has a description and possible values that appear when your pointer moves over a form field or an icon
Managing Click to Call

The Personal Agent enables you to initiate calls to contacts in your Personal address book as well as the Global address book (if enabled by your system administrator in your domain) by using the Click To Call functionality.

Using Click to call, you enter a phone number or SIP address of the device where you want to take the call, and then enter the called party number. The phone then rings at your preferred device. After the call is answered on your preferred device, you are connected with the called party.

Tip: Ensure that you have a client connected when you use Click to Call. If your client is not running, you cannot connect yourself as to the calling party using this feature.

Topics in this section include

- “Using Click to Call” on page 25
- “Using Click to Call from your Personal address book” on page 26
- “Using Click to Call from the Global address book” on page 27

Using Click to Call

To initiate a call using the Click To Call icon,

1. Access the Personal Agent main page.
2. Click on the Click to Call portlet.
The Click to Call window appears.

Tip: Ensure that you have a client connected when you use Click to Call. If your client is not running, you cannot connect yourself as the calling party using this feature.

3 In the CALL ME AT section, use the device list to select the device that you want to initiate the call from.

4 If you select Other in the device list, enter the telephone number or registered SIP address in the field below the device list.

5 In the MAKE A CALL TO section, enter a telephone number or registered SIP address in the field.

6 Check the Enable MKI check box. This check box generates crypto parameters in SDP (if SRTP is enabled).

7 Click Call.

The system calls you at the selected device. After you answer, the system makes a second call to the contact. When your contact answers, you can start your conversation.

Using Click to Call from your Personal address book

To initiate a call from your Personal address book,

1 Locate the contact in your Personal address book.

2 Click Call. The Click to Call window appears.

3 In the CALL ME AT section, use the device list to select the device that you want to initiate the call from.

4 If you select Other in the device list, enter the telephone number or registered SIP address in the field below the device list.

5 Check the Enable MKI check box. This check box generates crypto parameters in SDP (if SRTP is enabled).

6 Click Call.
The system calls you at the selected device. After you answer, the system makes a second call to the contact. When your contact answers, you can start your conversation.

**Using Click to Call from the Global address book**

To initiate a call from your Global address book (if enabled),

1. Select the user in the Global address book.
2. Click **Call**.
   OR
   Double-click the contact name.
   The Click to Call window appears.
3. In the **CALL ME AT** section, use the device list to select the device that you want to initiate the call from.
4. If you select Other in the device list, enter the telephone number or registered SIP address in the field below the device list.
5. Check the **Enable MKI** check box. This check box generates crypto parameters in SDP (if SRTP is enabled).
6. Click **Call**.
   The system calls you. After you answer, the system makes a second call to the contact.
Managing your preferences

This section describes all the services and features available on the Preferences portlet of the Personal Agent. Your administrator or service provider determines the actual set of services and features available to you, therefore you might not have access to some of the services or parameters listed. To request changes to your services, contact your system administrator.

Topics in this section include:

- “Configuring your personal preferences” on page 29
- “Managing your IP Deskphone” on page 38
- “Viewing and modifying Meet Me conferencing details” on page 40
- “Viewing and modifying Unified Communications” on page 42
- “Viewing and modifying Presence” on page 45
- “Viewing and modifying your Vertical Service Codes” on page 49
- “Viewing and modifying Call Services” on page 53
- “Viewing and modifying XMPP Gateway credentials” on page 54
- “Configuring Network Call Waiting Disable” on page 55
- “Configuring Calling Line Identification” on page 56

Configuring your personal preferences

You can configure personal information in your Personal Agent.

- “Modifying your contact information” on page 30
- “Changing your password” on page 31
- “Selecting a picture” on page 32
- “Deleting a picture” on page 33
- “Specifying a new reject reason” on page 33
To modify your contact information, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences portlet, select **Personal, Contact info**.
   
   From the Contact info page, you can view your first name, last name, and alias as entered by your service provider or system administrator.
3. Enter or modify the information according to the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td>Your first name as it appears to other users (viewable field only).</td>
</tr>
<tr>
<td>Last name</td>
<td>Your last name as it appears to other users (viewable field only).</td>
</tr>
<tr>
<td>email</td>
<td>E-mail address (for example <a href="mailto:tsmith@acme.com">tsmith@acme.com</a>).</td>
</tr>
<tr>
<td>Business phone</td>
<td>Your business phone number.</td>
</tr>
<tr>
<td>Home phone</td>
<td>Your home phone number.</td>
</tr>
<tr>
<td>Cell Phone</td>
<td>Your cell phone number.</td>
</tr>
<tr>
<td>Pager</td>
<td>Your pager number.</td>
</tr>
<tr>
<td>Fax</td>
<td>Your fax number.</td>
</tr>
<tr>
<td>Timezone</td>
<td>Your time zone, in which your predefined My Times Call Screening times are enforced.</td>
</tr>
<tr>
<td>Locale</td>
<td>Your language and region, for display in different languages, if supported. You must log off and log on again for the changes to take effect.</td>
</tr>
</tbody>
</table>
4. Click **Apply** to save your changes.  
**OR**  
Click **Cancel** to discard the changes.

5. To make the changes take effect, you must log off and log on to the Personal Agent.

### Changing your password

When you change your password, your password changes for all client devices (AS 5300 UC Client, AS 5300 Web Client, AS 5300 Office Client, Personal Agent, and Avaya IP Deskphone). The length and complexity of your password is determined by your system administrator.

Your password criteria can contain:

- minimum password length
- minimum number of digits
- minimum number of uppercase characters from A through Z
- minimum number of lowercase characters from a through z
- minimum number of special characters

Your password cannot contain spaces.

To change your password, perform the following steps.

1. Logon to the Personal Agent.
2. From the Preferences portlet, select **Personal, Password**.
3. Complete the required fields, using the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Password</td>
<td>Your new password (See your system administrator for password criteria).</td>
</tr>
<tr>
<td>Confirm Password</td>
<td>Confirmation of your new password.</td>
</tr>
<tr>
<td>Old Password</td>
<td>The old password that you entered when you registered with the Personal Agent.</td>
</tr>
</tbody>
</table>
Click **Apply** to save your changes.
**OR**
Click **Cancel** to discard your changes.

**Selecting a picture**

You can add a picture to use as your picture caller ID in the AS 5300 UC Client or AS 5300 Web Client. If you are replacing an existing picture ID, your new picture overwrites the previous picture.

To add or modify a picture, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences portlet, select **Personal, Picture**.
   
   The Picture page appears. The first time you access this page, you see a shadow figure to indicate that you do not have a picture in the database.
3. Click **Update**.
4. Enter the path and file name of the picture to use for your picture caller ID service.
   **OR**
   Click **Browse** and select a picture file.

**Tip:** The system resizes pictures greater than 160 x 120 pixels. Use only .png or .jpg files. Your system administrator defines the maximum picture size.

5. Click **Apply** to save the picture as your picture caller ID.
   **OR**
   Click **Cancel** to return to the Personal Picture Preference page.
The picture file you specify is sent to your service provider’s user database and appears on the AS 5300 UC Client or AS 5300 Office Client, and on the Picture page each time you use the Personal Agent. The picture also appears in the address book in card view mode.

A picture caller ID appears after the contact is added to the address book of the person being called.

**Deleting a picture**

You can delete your caller ID picture. Until you add a new picture, a shadow figure indicates that you do not have a picture in the database.

To delete your caller ID picture, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences portlet, select **Personal, Picture**.
3. Click **Delete** to delete your picture.

**Specifying a new reject reason**

Use the Reasons page to specify a reason or list of reasons to appear on your IP Deskphone when rejecting a call through Personal Agent routing.

To specify a new reason or a list of reasons for rejecting an incoming call, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences portlet, select **Personal, Reasons**.
3. In the **New Reasons** box, enter the text of the reason. For example, Busy right now or Try again later.

**Tip:** Reasons appear in the order that you enter them.

4. Click **Add**.
5 To add another reason, repeat steps 3 and 4.
6 To save the reasons, click **Apply**.
   OR
   Click **Cancel** to clear your input and reset your reason list to the last saved settings.
   OR
   Click **Remove** to remove the selected reason.
   OR
   Click **Remove All** to remove all reasons.

**Tip:** The reasons appear on your Avaya IP Deskphone, or in the Route Select rejection message window in the same order they appear in the Current Reasons window.

### Changing the order of the list of reasons

To change the order in which the reasons appear, perform the following steps.

1 Log on to the Personal Agent.
2 In the Preferences navigation pane, select **Personal, Reasons**.
3 In the Current Reasons box, select a reason from the list.
4 Click **Up** or **Down** to change the order of the reasons list.

**Tip:** The reasons appear on your Avaya IP Deskphone, or in the Route Select rejection message window in the same order they appear in the Current Reasons window.

5 To remove a reason from the list, select the entry in the **Current Reasons** list.
6 Click **Remove** to remove the selected reason.
   OR
   Click **Remove All** to remove all reasons.
   OR
   Click **Apply** to save your changes.
Configuring My Times date and time ranges

If the Advanced screening parameter is enabled, you can use the My Times page to create, modify, copy, rename, or delete day and time ranges to use when configuring conditions to screen and route your incoming calls.

Adding a new day and time range

To add a new day and time range,

1. Log on to the Personal Agent.
2. In the Preferences portlet, under the **Personal** sub-menu, click **My Times**.
   The My Times page appears. The first time you use the Personal Agent, you will see the following default day and time options to choose from in the My Times window:
   — My Office Hours
   — Nights and Weekends
3. Select a default option (for example, My Office Hours).
   The Day/Time Details section displays the default time range of 8:00 AM to 5:00 PM, Monday to Friday.
4. Click **Add** to create a new Day/Time range.
5. Enter a group name in the **Group Name** field.
   Default group name is New Group 1.
6. Select your Day/Time combinations by clicking on the appropriate time blocks.
7. Click **Save** to save your new Day/Time range and combinations.
   OR
   Click **Cancel** to return to the My Times page without creating a new range.
   The new range appears in the My Times window.

Day and Time example

If you work part time, you might want to add a Day/Time combination that will only apply on Mondays, Wednesdays, and Fridays between the hours of 7:30 AM and 5:30 PM. To configure these hours,
1. Click Add.
2. Create a new group called Part Time.
3. Click to select the appropriate time blocks (7:30 AM and 5:30 PM) under Monday, Wednesday, and Friday.
4. Click Save.

The graphic display in the Day/Time Details window is updated with your selected days and times.

**Modifying a day and time range**

To modify an existing day and time range,

1. Log on to the Personal Agent.
2. In the Preferences portlet, under the Personal sub-menu, click **My Times**.
   The My Times page appears with Day/Times options in the My Times window.
3. Click an option in the My Times window (for example, My Office Hours).
   The Day/Time Details section of the window displays the day and time range.
4. Click **Modify**.
5. Enter your changes to the days and time ranges on the My Times page.
6. Click **Save** to save your Day/Time changes.
   OR
   Click **Cancel** to return to the My Times page.

**Copying a day and time range**

To copy a Day/Time range,

1. Log on to the Personal Agent.
2. In the Preferences portlet, under the Personal sub-menu, click **My Times**.
   The My Times page appears.
3. Select the option you want to copy in the My Times window.
4. Click **Copy**.
The My Times copy page appears.

5 Enter a name for the new Day/Time Range.

6 Click **Save** to save your changes.

OR
Click **Cancel** to return to the My Times page.

The My Times page appears with the new Day/Time range in the Day/Time Details window.

### Renaming a day and time range

To rename a day and time range,

1 Log on to the Personal Agent.

2 In the Preferences portlet, under the Personal sub-menu, click **My Times**.

The My Times page appears.

3 Select an option in the My Times window.

4 Click **Modify**.

The My Times rename window appears.

5 Enter a new name for the Day/Time range.

6 Click **Save**.

OR
Click **Cancel** to return to the My Times page.

### Deleting a day and time range

To delete a day and time range,

1 Log on to the Personal Agent.

2 In the Preferences portlet, under the Personal sub-menu, click **My Times**.

The My Times page appears.

3 Select an option from the My Times window.

4 Click **Delete**.
At the confirmation box, click **OK** to confirm that you want to delete the My Times option.

**OR**
Click **Cancel** to return to the My Times page.

### Managing your IP Deskphone

You can configure or modify your IP Deskphone preferences by clicking the Preferences icon on the Quick Start page or from the navigation pane.

- “Creating a subject list for your IP Deskphone calls” on page 38
- “Changing the order of the subject list” on page 39
- “Personalizing your presence” on page 39
- “Checking your IP Deskphone preferences” on page 40

In this document, IP Deskphone refers to the Avaya 1120E IP Deskphone with UNIStim firmware, and Avaya 1140E IP Deskphone with UNIStim firmware.

### Creating a subject list for your IP Deskphone calls

On your IP Deskphone, you can create a list of subjects to add to an outgoing call. The subject appears on the IP Deskphone, as well as other registered Session Initiated Protocol (SIP) clients, of the person you are calling and tells them why you are calling.

To create a new subject, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences navigation pane, select **IP Deskphone, Subjects**.
3. Enter the text of the subject in the **New Subject** box.
4. Click **Add**.
5. Click **Apply**.

The subject appears in your Current Subjects box.

6. To add another subject, repeat steps 3 and 4.
To remove a subject, select the entry, and click **Remove**.

**OR**
To remove all subjects in the list you created, select all the entries, and click **Remove All**.

**OR**
Click **Apply** to save your new subjects.

### Changing the order of the subject list

To specify the order in which the subjects appear on your IP Deskphone, perform the following steps.

1. Log on to the Personal Agent
2. In the Preferences portlet, click **IP Deskphone, Subjects**.
3. In the Current Subjects area, click a subject.
4. Click **Up** or **Down** to change the order of the subject list.
5. Click **Apply** to save your changes.

### Personalizing your presence

To customize a presence status note for display on the IP Deskphone, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences navigation pane, select **IP Deskphone, Personalized presence**.
3. In the **New Note** box, enter a note.
4. Click **Add**. The new note appears in the Current notes box.
5. To add another note, repeat steps 3 and 4.
6. To reorder the presence note for display on the IP Deskphone, select the note from the Current notes box and click **Up** or **Down**.
7. To remove a note, select the note from the **Current notes** box and click **Remove**.
Checking your IP Deskphone preferences

If you work in a number of locations and often log on to several IP Deskphones, you can use the IP Deskphone option to check your logon status and log off your active phone.

To check the logon status of an IP Deskphone perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences navigation pane, select IP Deskphone, Logout.
   The Logout page appears.
3. Look for the IP Deskphone that you are logged on to, based on the Device Label, MAC address, or Users.
4. Click Log Me Out for the IP Deskphone you want to log off.
5. Click OK at the confirmation message.

Viewing and modifying Meet Me conferencing details

The Meet Me Audio Conferencing service enables your own personal conference bridge, available 24 hours a day. Use of the bridge is strictly enforced through PIN access. After participants dial into the bridge, they receive a greeting and a request to enter an Access Code. The Access Code uniquely identifies your personal bridge. Only you, as the chairperson (the person who owns the bridge), can open the bridge and allow all participants to join.

- “Modifying Meet Me preferences” on page 41
Modifying Meet Me preferences

To view the details of your bridge, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences navigation pane, select Meet Me Conferencing, Preferences.
3. View the specific details of your conference information:
   - Dial-In Number
   - Access Code
   - Collaboration URL (static): not currently supported.
   - URL (dynamic): not currently supported.
   - A checkbox indicates whether or not the conference uses fast start (the conference starts as soon as one person connects to the bridge).
   - A check box indicates whether or not the conference will end after you disconnect from the call.
   - A check box indicates whether or not to receive instant messages (such as attendance roster and collaboration material access) during the conference.
   - A check box enables or disables interactive participants use of audio emoticons. Your system administrator provides the media source files for the audio emoticons.
   - E-mail address to receive conference recordings.
   - Option buttons to select audio entry/exit tone indicators to announce the arrival and departure of conference participants.
4. Click Apply.
   OR
   Click Cancel if you do not want to save the changes.

Changing your Meet Me PIN

To change your Meet Me Chairperson PIN,
1  Log on to the Personal Agent.
2  In the Preferences navigation pane, select Meet Me Conferencing, PIN.
3  Enter a number between 4 and 10 digits long in the New Chair PIN field.
4  Enter the new PIN again in the Confirm PIN field.
5  Enter your Personal Agent password.
6  Click Apply to save your changes.
   OR
   Click Cancel to discard your changes. The page displays the original information.

**Viewing and modifying Unified Communications**

The Unified Communications service provides you with integrated access to your voice mail messages from a preferred client device, such as a PC, Voice over IP (VoIP) phone, wireless phone, or a traditional circuit switched telephone. Use the Personal Agent to view and modify the details of your account.

- “Viewing your mailbox configuration” on page 42
- “Configuring your greeting message” on page 43
- “Modifying your current greeting settings” on page 43
- “Changing your mailbox PIN” on page 43
- “Configuring your e-mail preferences” on page 44
- “Controlling your automatic login” on page 44
- “Configuring recording time for incoming voice mail messages” on page 45

**Viewing your mailbox configuration**

To view your mailbox configuration,

1  Log on to the Personal Agent.

2  In the Preferences portlet, select Unified Communications, Overview to display your mailbox number and the access numbers for the Unified Communications service.
Configuring your greeting message

To select which recorded greeting plays before a user leaves you a message, perform the following steps.

1 Log on to the Personal Agent.
2 In the Preferences portlet, select **Unified Communication, Greetings, Set active greetings**.
3 From the list, select the recorded greeting to play before a user leaves you a message:
   - System
   - Temporary
   - Personal
   - Custom (up to three custom greetings)
4 Click **Apply** to save your changes after you complete your work.
   OR
   Click **Cancel** if you made changes and you do not want to save them.

Modifying your current greeting settings

To modify your greeting settings, perform the following steps.

1 Log on to the Personal Agent.
2 In the Preferences portlet, select **Unified Communications, Greeting settings**.
3 Click the **Modify** link for each greeting to specify a different e-mail address to deliver your voice mail message to and to assign transfer destinations.
4 Click **Apply** to save your changes after you complete your work.
   OR
   Click **Cancel** if you made changes and you do not want to save them.

Changing your mailbox PIN

To change your Personal Identification Number (PIN) for accessing your mailbox, perform the following steps.
1 Log on to the Personal Agent.
2 In the Preferences portlet, select **Unified Communications, PIN**.
3 Enter a new PIN (from 4 to 10 digits) in the **New PIN** field.
4 Enter the new PIN again in the **Confirm PIN** field.
5 Confirm these changes by entering your Personal Agent password in the **Confirm Personal Agent password** field.
6 Click **Apply** to save your changes.
   OR
   Click **Cancel** if you made changes and you do not want to save them.

### Configuring your e-mail preferences

To change the e-mail delivery options of your voice mail messages:

1 Log on to the Personal Agent.
2 In the Preferences portlet, select **Unified Communications, Email preferences**.
3 Modify the e-mail delivery options of your voice mail messages.
4 Click **Apply** to save your changes.
   OR
   Click **Cancel** if you made changes and you do not want to save them.

### Controlling your automatic login

To control your Unified Communications logon when using other Public Switched Telephone Network (PSTN) telephones (such as a cell phone) that are not hosted by the Application Server 5300 network, perform the following steps.

1 Log on to the Personal Agent.
2 In the Preferences portlet, select **Unified Communications, Auto Identification**.
3 Select the option to use automatic identification when calling from your client.
4 Click **Apply** to save your change.
5 Provide direct access to your mailbox by using the customizable option to enter up to three different PSTN or Electronic Switched Network (ESN) numbers.

6 Click **Save** to save your changes.
   **OR**
   Click **Cancel** if you made changes and you do not want to save them.

Remember that the customizable option only allows you to enter valid PSTN or ESN digits and not a user name. Only PSTN numbers that are not hosted by the Application Server 5300 network can be used for automatic identification. For example, automatic identification does not work when users call from a known device, such as the cell phone or home phone.

### Configuring recording time for incoming voice mail messages

To configure the maximum recording time for incoming voice mail messages, perform the following steps.

1 Log on to the Personal Agent.

2 In the Preferences portlet, select **Unified Communications, Message Storage**.

3 Configure the maximum length (in seconds) for an incoming voice mail message.

4 Click **Apply** to save your changes.
   **OR**
   Click **Cancel** if you made changes and you do not want to save them.

### Viewing and modifying Presence

Presence enables you to see the online status of other users on the network, lets others know your status, and also allows you to be immediately notified when a new watcher is requesting authorization to view your presence. You must have Presence service enabled.

- “Viewing and modifying your Watchers List” on page 46
Viewing and modifying your Watchers List

To see a list of people who subscribe to your presence information, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences portlet, select **Presence, Watchers**.
   The list shows only the active username watching your presence, not all users registered to your presence. The date when an active watcher subscribed to your presence information also appears.
3. To ban an active watcher from seeing your presence information,
   a. Select the check box beside the watcher’s username.
   b. Click **Ban watchers**.
      The Banned watchers list appears with the new banned watcher’s username.

Configuring a Banned watchers list

You may want to ban someone from subscribing to your presence information in the future. Use the Banned watchers menu option to restrict access by other users who do not currently appear in your watchers list.

To ban someone from viewing your presence information, perform the following steps.

1. Log on to the Personal Agent.
2. In the Preferences portlet, select **Presence, Banned Watchers**.
3. Enter the SIP address of the person you want to ban.
4 Click **Add**. The person you added to the ban list can call you, but they can no longer see your online status. The name now appears in a list of banned users.

5 To delete a user from your ban list, click to select the Banned User, click **Delete**, and then click **OK** at the confirmation message. The person is removed from the ban list.

**Modifying your presence service preferences**

If you have the Automatic presence service enabled, you can automatically let other users in your domain know whether you are away from your PC or on the phone.

This window also allows you to configure your Enhanced authorization setting, which allows you to opt in or out of the authorization feature. There are 3 values for Enhanced Authorization: Yes, No, or Not Set. By default, your value is configured to Not Set, which allows watchers to see your presence unless specifically banned. If you opt-in (Yes), then you are asked to authorize a watcher to see your presence status. Authorization takes place in your AS 5300 UC Client or AS 5300 Office Client.

To modify your Automatic presence options, perform the following steps.

1 Log on to the Personal Agent.

2 In the Preferences portlet, select **Presence, Preferences**.

3 Select **Yes** or **No** in the **Report when on the phone** field, to allow other users to know when you are on the phone or when you are inactive.

4 Enter a time value into the **Inactivity Timer (in minutes)** field in the range of 10 to 600 minutes. This value is the number of minutes that must elapse before your status is reported as inactive. People who subscribe to your presence are alerted to your presence change after the elapsed time.

The Inactivity Timer (in minutes) option applies only to the Personal Agent, which includes the AS 5300 UC Client and AS 5300 Office Client. This option does not apply to the Avaya IP Deskphone.

5 Select an entry in the **Enhanced authorization** box. There are three possible values:

   — **Yes**: enables Enhanced Authorization; you are asked for authorization before a watcher can see your presence status.
— **No**: disables Enhanced Authorization; all watchers are allowed to see your presence status unless specifically banned

— **Not Set**: this is the default setting; all watchers are allowed to see your presence status unless specifically banned.

6 Click **Apply** to save your changes.

OR

Click **Cancel** to discard them.

Any changes to your services are reflected the next time you log in.

**Viewing and modifying your Authorized Watchers list**

You might want to add someone to your list of authorized watchers, which allows them to subscribe to your presence information in the future. Use the Authorized watchers option to allow access by other users who do not currently appear in your watchers list.

If you are an assisted user, the users assisting you are automatically approved, and will see your presence information. For more information on Assistant support, see “Managing Assistant Console and Services” on page 95.

To allow someone to view your presence information,

1 Log on to the Personal Agent.

2 In the Preferences portlet, select **Presence, Authorized Watchers**.

   The list shows only the active username watching your presence, not all users registered to your presence. The date when an active watcher subscribed to your presence information also appears.

3 Enter the SIP address of the person you want to authorize.

4 Click **Add**.

   The person you added to the Authorized watchers can see your online status. The name now appears in the Authorized watchers list.

5 To delete a user from your Authorized watchers list, click to select the Authorized User, click **Delete**, and then click **OK** at the confirmation message.

   The party is removed from the Authorized watchers list.
Viewing and modifying your Show-Offline Watchers list

You might want to appear as Offline to particular users. Use the Show-Offline watchers option so that watchers see your status as "Offline".

To appear as "Offline" to specific users,

1. Log on to the Personal Agent.
2. In the Preferences portlet, select Presence, Show-Offline watchers.
3. Enter the SIP address for the person for which you want to appear Offline.
4. Click Add.

   The person you added to the Show-Offline watchers can still call you, but they see your online status as Offline. The name now appears in the Show-Offline watchers list.

5. To delete a user from your Show-Offline watchers list, click to select the User, click Delete, and then click OK at the confirmation message.

   The user is removed from the Show-Offline watchers list.

Viewing and modifying your Vertical Service Codes

Vertical Service Codes (VSC) are special telephone numbers that usually begin with the star (*) key on the keypad. You use VSCs, also referred to as star codes or feature codes, to trigger specific features and actions.

The following table gives a brief description of the VSC services.
### Table 1  VSC Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anonymous Call Rejection</td>
<td>Allows you to automatically reject calls where the number is withheld or Privacy Indicator (Privacy Header) is configured to restrict display.</td>
</tr>
<tr>
<td>Call Forward Immediate</td>
<td>Allows you to forward all incoming calls to a specified DN.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td>Allows you to forward your calls to voice mail so that you are not disturbed. If voice mail is not enabled, the call is rejected with “Do Not Disturb” text.</td>
</tr>
<tr>
<td>Call Forward Conditional</td>
<td>Allows you to block or forward calls based on the response of your device.</td>
</tr>
<tr>
<td>Call Forward Variants Busy</td>
<td>Allows you to forward calls when your device is busy (that is, engaged in a call).</td>
</tr>
<tr>
<td>Call Forward Variants No Answer</td>
<td>Allows you to forward calls whenever you do not answer.</td>
</tr>
<tr>
<td>Call Forward to Voicemail</td>
<td>Allows you to forward calls to voice mail when your device is busy.</td>
</tr>
<tr>
<td>Adjust Rollover timer (# of rings)</td>
<td>Allows you to configure the number of times that your primary device rings before trying the next route, including voice mail.</td>
</tr>
<tr>
<td>Disable All Call Forwardings</td>
<td>Allows you to turn off all forms of call forwarding except for Default Route.</td>
</tr>
<tr>
<td>Ad Hoc Conferencing through VSC</td>
<td>Allows you to activate or deactivate and check status of Ad Hoc service.</td>
</tr>
<tr>
<td>Calling Name/Number Privacy per call</td>
<td>Allows you to restrict user details in SIP message to the terminator for only the specified call.</td>
</tr>
</tbody>
</table>
Viewing Vertical Service Codes prefixes

To view the VSC prefixes for the VSC services available to you,

1. Log on to the Personal Agent.
2. In the Preferences portlet, click Vertical Service Codes, VSC.

   The Vertical Service Codes Prefixes page lists the prefixes along with the prefix name and VSC function.

<table>
<thead>
<tr>
<th>Service</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calling Name/Number Presentation per call</td>
<td>Allows you to restrict user details in SIP message to the terminator for only the specified call after Privacy service is active.</td>
</tr>
<tr>
<td>Calling Name/Number Restriction per call</td>
<td>Allows you to restrict user details in SIP message to the terminator for only the specified call, whether Privacy service is active or not.</td>
</tr>
<tr>
<td>Network Call Waiting Disable through VSC</td>
<td>Allows you to activate or deactivate and check status of the Network Call Waiting Disable service.</td>
</tr>
<tr>
<td>Network Call Waiting Disable per call</td>
<td>Allows you to activate Network Call Waiting Disable service for only the initiated session.</td>
</tr>
<tr>
<td>Last Call Return</td>
<td>Allows you to check the time and telephone number of the last received call, and to initiate a call back to the last caller.</td>
</tr>
<tr>
<td>Voice Mail Retrieve through VSC</td>
<td>Allows you to retrieve voice mail with a VSC.</td>
</tr>
<tr>
<td>Malicious Call Trace</td>
<td>Allows you to instruct Application Server 5300 to trace the last call and forward the information to the carrier or law enforcement.</td>
</tr>
</tbody>
</table>
Viewing Malicious Call Trace prefixes

To view the MCT prefixes, for the MCT services available to you,

1. Log on to the Personal Agent.
2. In the Preferences portlet, click Vertical Service Codes, MCT.

The Malicious Call Trace Prefixes page lists the MCT prefix and name.

Modifying VSC routes

While you cannot modify a VSC itself, the destination or action associated with several of the VSCs can be modified. The VSC routes you can modify are:

- Anonymous Calls
- Do Not Disturb
- Call Forward Immediate
- Call Forward Variants.

Modifying the routes, associated with the VSCs above, is done using the Routes portlet. For details on modifying routes, see “Managing Routes” on page 57.

Changing your Vertical Service Codes PIN

To change your VSC PIN,

1. Login to the Personal Agent.
2. In the Preferences portlet, click Vertical Service Codes, Vertical Service Codes PIN.

The Vertical Service Codes PIN page appears.
3. Enter the required information.
4. Click Apply to save your changes.
   OR
   Click Cancel to discard them.
Viewing and modifying Call Services

Call Services allows you to view and modify the status of your assigned call services.

- “Configuring Call Return” on page 53
- “Configuring Ad Hoc Conferencing” on page 53
- “Modifying Call park” on page 54

Configuring Call Return

Call Return allows you to dial the last caller, whether or not you answered the call. This service must be enabled in your service package.

To view or modify the status of Call Return,

1. Log on to the Personal Agent.
2. In the Preferences portlet, select Call Services, Call Return.
3. To change the status of the service, from the drop-down menu, select No to deactivate.
   OR
   Select Yes to activate.
4. Click Apply to save your changes.
   OR
   Click Cancel to discard your changes

Configuring Ad Hoc Conferencing

Ad Hoc Conferencing allows you to join multiple calls into one conference call. Your administrator must enable this service.

To view or modify the status of Ad Hoc Conferencing,

1. Log on to the Personal Agent.
2. In the Preferences portlet, select Call Services, Ad Hoc Conferencing.
To change the status of the service, from the **Ad Hoc Conferencing** drop-down menu, select **No** to deactivate.

**OR**
Select **Yes** to activate.

Click **Apply** to save your changes.

**OR**
Click **Cancel** to discard your changes.

### Modifying Call park

Call Park enables you to place a call on hold so that someone else can retrieve it. The call can be returned to you if the call is not picked up after a specified amount of time. For information on how to use the call park feature, see the user guide for your device. Call park service must be enabled.

To change your call park configuration,

1. Log on to the Personal Agent.
2. In the Preferences portlet, select **Call Services, Call park**.
3. Select **Yes** or **No** from the **Auto-Retrieve parked calls** list.
4. If you configure autoretrieve, enter the amount of time (in seconds) that must elapse before a call is autoretrieved in the **Auto-Retrieve Timer** field.
5. Click **Apply** to save your changes.

**OR**
Click **Cancel** to discard your changes.

### Viewing and modifying XMPP Gateway credentials

The Extensible Messaging and Presence Protocol (XMPP) Gateway enables you to send and receive Instant Messages (IMs) using your AS 5300 UC Client and AS 5300 Office Client with users on external communities: Yahoo, Google, AOL, MSN and Jabber. You can also subscribe to the presence of these external community users.
When the AS 5300 UC Client or AS 5300 Office Client sends an IM to an external community, the XMPP Gateway logs into the external community on your behalf using the credentials that you provide in the Personal Agent. Similarly, when a user from an external community sends you an IM, the XMPP Gateway uses your credentials to deliver the IM to you.

**Tip:** To interact with the XMPP Gateway, you must have a Jabber account.

To view or modify your XMPP Gateway credentials,

1. Login to the Personal Agent.
2. In the Preferences portlet, click **XMPP Gateway, XMPP Gateway**.
   The XMPP Gateway page appears.
3. Enter your Jabber user name and password.
4. Enter your user name and password for any other the external communities with which you want to exchange IMs and presence information.
5. Click **Save**.
   You receive a confirmation IM stating that you are now logged into the XMPP Gateway and any other external community that you are trying to access.

**Tip:** Some systems do not allow you to be logged into more than one location. For example, you cannot be logged into Yahoo Messenger and your AS 5300 UC Client at the same time and receive presence updates from the Yahoo community.

**Configuring Network Call Waiting Disable**

To view or modify the status of Network Call Waiting Disable,

1. Navigate to the Personal Agent **Home** page.
2. In the **Preferences** navigation pane, select **Services, Network Call Waiting Disable**.
To change the status of the service, from the drop-down menu, select No to deactivate.

OR

Select Yes to activate.

Click Apply to save change.

Configuring Calling Line Identification

Use the Calling Line Identification feature to specify if you want your name and number displayed after you call someone. Calling Line Identification service must be enabled.

To change your Calling Line ID Restriction setting, perform the following steps.

1. Navigate to the Personal Agent Home page.
2. In the Preferences navigation pane, select Call Services, Calling Line ID Restriction.
3. If you want your name and number displayed after you call someone, select No from the Calling Name/Number Privacy list.
4. If you do not want your name and number displayed after you call someone, select Yes from the Calling Name/Number Privacy list.

Warning: If you enable this service, your calling ID appears as either unknown or anonymous.

5. Click Apply to save your changes.

OR

Click Cancel if you made changes and you do not want to save them.
Managing Routes

The Personal Agent Routes portlet has two functions: call screening and call routing.

- Call screening provides you the functionality to screen calls and route the call to your voice mail or based on the calling party, day and time, or call treatment.
- Call routes provides you the functionality to configure basic routes for your incoming calls.

If Advanced screening service is not enabled, you cannot use the Personal Agent routing capabilities. If you do not have routing capability, a default route is defined for you. It rings your phone and, if you are subscribed to the voice mail service, the unanswered call is sent to voice mail.

The Assisted user uses the Routes portlet in the Personal Agent to route incoming calls to the designated assistant groups.

Topics in this section include

- “Call screening” on page 57
- “Call Routes” on page 61
- “Advanced Call Routes” on page 64

Call screening

Call screening provides the functionality to screen calls and route the call to your voice mail or to another destination, based on a specified call treatment.

- “Modifying call screening for Anonymous Calls” on page 58
- “Screening calls based on the calling party” on page 58
Modifying call screening for Anonymous Calls

Anonymous Call Rejection (ACR) allows you to reject calls from callers who have blocked the display of their telephone numbers from a Caller ID device. ACR discourages anonymous calls, because callers must allow their numbers to be displayed in order to reach you.

Anonymous Calls is associated with a VSC. To determine the associated VSC, see “Viewing Vertical Service Codes prefixes” on page 51.

To modify the Anonymous Call Rejection route,

1. Login to the Personal Agent.
2. In the Routes portlet, under Call Screening, check the box for Anonymous Calls.
3. Click Anonymous Calls.
4. Change the configuration as required.
5. Click Apply.

Screening calls based on the calling party

To screen your calls to voice mail based on the calling party,

1. Login to the Personal Agent.
2. In the Routes portlet, under the Call Screening tab, click Calling Party.
3. Select the On radio button.
4. Enter the name, phone number or SIP address to be screened.
5. Click Add.
   The calling party appears in the list.
6  Click Apply.

Screening calls based on Time of Day

To screen your calls to voice mail based on your Time of Day configuration,

1  Login to the Personal Agent.
2  In the Routes portlet, under the Call Screening tab, click By Time Of Day.
3  Select the On radio button.
4  Select the desired day/time ranges.
   The time options are configured in “Configuring My Times date and time ranges” on page 35.
5  Click Apply.

Modifying call screening for Do Not Disturb

The Do Not Disturb option allows you to have your calls forwarded immediately to a voice mail destination, if you have voice mail service enabled. This voice mail destination cannot be changed.

Do Not Disturb is associated with a VSC. To determine the associated VSC, see “Viewing Vertical Service Codes prefixes” on page 51.

To modify the Do Not Disturb route,

1  Login to the Personal Agent.
2  In the Routes portlet, under Call Screening, select Do Not Disturb.
   The Routes portlet maximizes.
3  In the Do Not Disturb window, changes the configuration as required.
4  Click Apply.

Screening incoming calls to a Call Treatment

To screen your calls to a call treatment,
1 Login to the Personal Agent.

2 In the Routes portlet, under the Call Screening tab, select Screening To a Call Treatment.

3 Select Incoming.

4 In the Selective reject tab, enter a phone number, SIP address or wildcard to be screened.

5 Click Apply.
The new entry is added to the blocked list of incoming calls.

6 To screen all calls, select the Deny all calls tab.

7 Check the box for All Incoming Calls.

8 Click Apply.
All incoming calls are screened.

9 Click OK.

**Screening outgoing calls to a Call Treatment**

When outgoing calls are screened, the call is redirected to an audio recording. To screen outgoing calls,

1 Login to the Personal Agent.

2 In the Routes portlet, under the Call Screening tab, click Screening To a Call Treatment.

3 Click Outgoing.
The Routes portlet maximizes.

4 In the Selective reject tab, enter a phone number, SIP address or wildcard to be screened.

5 Click Apply.
The new entry is added to the blocked list of outgoing calls.

6 To screen all calls, select the Deny all calls tab.

7 Check the box for All Outgoing Calls.

8 Click Apply.
All outgoing calls are barred.

9 Select the Call Type Based tab.
10 Check the boxes applicable to the call types you want barred. The options include: International, Long Distance Inter Rate Area, Local, Premium, and Long Distance Intra Rate.

11 Click Apply. Outgoing calls based on the selected types are barred.

Call Routes

Call Routes provides you with four basic route configurations:

- “Configuring Call Routes using Call Forwarding Immediate” on page 61
- “Configuring Call Routes using Sequential Ringing” on page 62
- “Configuring Call Routes using Simultaneous Ringing” on page 62
- “Configuring Call Routes using Call Forward Variants” on page 62

When you configure call routes, the number of rings can be configured. The number of rings that actually occur depend on the time it takes to ring the particular device, with some devices being slower to ring than others. Also, Multilevel Precedence and Preemption (MLPP) calls will result in a different type of ringing. The system uses a time period and does not count the actual number of rings before routing the call.

Configuring Call Routes using Call Forwarding Immediate

Call Forwarding Immediate is associated with a VSC. To determine the associated VSC, see “Viewing Vertical Service Codes prefixes” on page 51.

To configure all your calls to be routed immediately,

1 Login to the Personal Agent.
2 In the Routes portlet, select Call Routes.
3 Select Call Forwarding Immediate
4 Select the On radio button.
5 Select a destination for the forwarded call.
6 Select the number of rings for the call destination.
7 Click Apply.

### Configuring Call Routes using Sequential Ringing

To configure your calls to be routed using sequential ringing,

1 Login to the Personal Agent.
2 In the Routes portlet, select **Call Routes**.
3 Select **Sequential Ringing**.
4 Select the **On** radio button.
5 Select the number of rings before the call is forwarded to the next number.
6 In order, enter the numbers to be called.
7 Click **Apply**.

### Configuring Call Routes using Simultaneous Ringing

To configure your calls to be routed using simultaneous ringing,

1 Login to the Personal Agent.
2 In the Routes portlet, select **Call Routes**.
3 Select **Simultaneous Ringing**.
4 Select the **On** radio button.
5 Select the number of rings.
6 Enter the numbers to be called at the same time.
7 Click **Apply**.

### Configuring Call Routes using Call Forward Variants

Call Forward Variants are associated with a VSC. To determine the associated VSC, see “**Viewing Vertical Service Codes prefixes**” on page 51.

To configure your calls to be routed based on variants,
1  Login to the Personal Agent.
2  In the Routes portlet, select Call Routes.
3  Select Call Forward Variants.
4  Select the On radio button.
5  Select the number of rings before the call is forwarded.
6  Select the destination for the call if busy.
   OR
   Select the destination for the call if no answer.
   OR
   Make selections for both.
7  Click Apply.

Modifying Call Forward Variants route

Call Forwarding functions automatically create routes that are added to your route list. When you dial a vertical service code (VSC) activation number for a Call Forwarding function, the system activates the associated route for the given VSC. When you deactivate a Call Forwarding function with a VSC, the corresponding route is deactivated. For VSC descriptions, see “Viewing Vertical Service Codes prefixes” on page 51.

These routes cannot be reordered, renamed or deleted. VSC Call Forwarding routes have precedence over any user-configured routes, so they appear first in the route list. Activating any of these Call Forwarding routes makes all routes below unavailable except for the default route, even if the routes below are activated.

The Call Forward Variants route allows you to have two additional call destinations to the default destination. The first call destination is configured to “My Client” and cannot be changed by VSC.

- If the first call destination response is busy, the first additional call destination is attempted, if the “If busy, …” option of the route actions is selected.
- If the first call destination response is no answer, the second additional call destination is attempted, if the “If no answer, …” option of the route actions is selected.

To modify the Call Forward Variants route,
1 Click the **Route** icon from the Personal Agent Quick Start page or click the **Route** tab to display the List of Routes.

2 Check the box for **Call Forward Variants**, and click **Modify**. The Call Forward Variants page appears.

3 Select the Number of Rings (2 - 9, 4 is the default).

4 Check the box for **Busy Destination** to activate forwarding to the Busy Destination if the first call destination (“My Client”) is busy.

5 Enter a phone number or address for the Busy Destination in the text box provided.

6 Check the box for **No Answer Destination** to activate forwarding to the No Answer Destination if the first call destination (“My Client”) does not answer.

7 Enter a phone number or address for the No Answer Destination in the text box provided.

8 Check **Then send to Voicemail** to send the call to voice mail.

9 Click **Save**.

**OR**

Click **Cancel** to return to the List of Routes without making any changes.

---

**Advanced Call Routes**

A route enables you to perform different actions on your incoming calls and Instant Messages based on a set of conditions or exceptions. For example, you can create a route named “Lunch” that specifies a condition that calls received between 12:00 pm and 1:00 pm Monday through Friday are to be affected by the route. The route “Lunch” would also have an action that specifies that calls that are affected by the route will ring your mobile phone first, and then send the call to voice mail.

**Tip:** Routes are applied to incoming calls in the order in which they are listed in the List of Routes window. Click Move up or Move down to change the order of how your incoming calls are treated.
When there are multiple active routes in the route list, only one route will apply to the call. The first active route which has conditions and exceptions that match the call will apply. If a route has no conditions or exceptions it will apply to all calls, so it should be ordered below the rest of the routes.

For example, if you create a route to handle calls from an anonymous caller, you would order that route higher in the route list than a route to handle calls from “anyone” with exceptions specified.

Creating a route

You can create routes with the Personal Agent Route portlet. The Routes portlet provides a step-by-step procedure that makes the task of creating rules and conditions for your incoming calls easier.

Use the Route portlet to:

- define routes for how your incoming calls and Instant Messages (IM) are handled
  Instant messaging must be enabled in order to see the option that enables you to be able to send and receive instant messages.
- specify conditions as to how and on which devices specific calls should be presented to you in a simultaneous or sequential fashion
- define personalized time blocks to further define your routes so that you are always in reach
- send an IM or push a web page when certain conditions and exceptions that match the call are met.

As with instant messaging, the web page option must be enabled.

Limitations and restrictions

If the destination in the route does not directly correspond to an existing alias, username, or DN in the database, and the destination is later translated using private translation and then becomes the alias, username, or DN of the route owner, the call is not routed correctly. It goes into an endless loop.
Understanding the route creation steps

The following table describes the steps to follow when you create a route using the Personal Agent Routes portlet.

<table>
<thead>
<tr>
<th>This step...</th>
<th>Specifies...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate action</td>
<td>the main action or actions that initiates the processing of the route. There are two options listed here to select from: When a call is received or When an Instant Message is received (if enabled). Select the desired option by clicking on the appropriate checkbox.</td>
</tr>
<tr>
<td>Conditions</td>
<td>filtering of conditions respective to the call originator and the time of day that must apply before the Actions can take place.</td>
</tr>
<tr>
<td>Outcome Actions</td>
<td>what action or actions are performed when a call is received. Actions are defined with respect to the services enabled.</td>
</tr>
<tr>
<td>Exceptions</td>
<td>what are the exceptions to the filtering conditions defined in Conditions.</td>
</tr>
</tbody>
</table>

To create routes using the Personal Agent Routes portlet,

1 Login to the Personal Agent.
2 In the Routes portlet window, click Advanced.
   The first time you use the Routes portlet, the list of routes has a default (permanent) route checked and dimmed. The default route forwards all calls and instant messages to your client. If you have voice mail service, the default route will forward calls to voice mail if you do not answer the call.
3 Click New.
4 Enter a name for the route.
5 Click OK.
6 Select the Initiate Action tab.
7 Select the actions to trigger the route.
   If you do not have Instant Messaging enabled, you do not see the Instant Messaging option.
8 Click OK.
9 Select the Conditions tab.
10 Select all the conditions that apply to your route.
If you select a condition that contains underlined text, a new window opens and you must make further selections. The day and time ranges are controlled by your My Times configuration, see “Configuring My Times date and time ranges” on page 35.

11 Click OK.

12 Select the **Outcome Actions** tab.

The options listed in the **Outcome Actions** tab vary depending on your selections in the **Initiate Actions** tab. For instance, the **Forward or reply** action only appears when you select **When an instant message is received** in the Initiate Actions tab.

13 Select the action you would like performed.

If you select an action that contains underlined text, click on the underlined text and make further selections.

**Ring my devices in the following ordered lists:** allows you to create a list of numbers to either forward the call, send an instant message, or push a web page.

**Forward or reply:** allows you to forward the instant message to a specific phone number or SIP address, send an instant message, or push a web page.

**Send straight to voicemail:** allows you to send the call to your voice mail and play the selected greeting.

**Rejection message:** allows you to create a rejection message to be sent to the caller.

**Request an email:** requests an email from the caller.

14 Click OK.

15 Select the **Exceptions** tab.

16 Select the exceptions when this route should not apply.

If you select an action that contains underlined text, a new window opens and you must make further selections.

17 Click OK.
When a route specifies that all incoming calls be forwarded to another user, then the collaboration features, specifically sharing whiteboard and transferring clipboard, are also forwarded to the user specified in this route. However, this call forwarding route does not permit sending web pages to the user specified in this route. To forward web pages to another user, a route must be created to forward all incoming instant messages to a specific user.
Managing Call Logs

The Personal Agent enables you to view a list of incoming and outgoing calls made by any device for which you are logged on.

Topics in this section include

- “Viewing call logs” on page 69
- “Calling contacts from the call log” on page 70
- “Saving contacts from the call log information” on page 70
- “Clearing call log information” on page 70

Viewing call logs

To view your list of incoming and outgoing calls,

1 Logon to the Personal Agent.
2 In the Call Logs portlet, select the Incoming or Outgoing tabs to see the calls.

The Incoming tab shows information about the caller’s name, the time and duration of the call, and caller address. The icons in the Type column of your inbox indicate whether you answered the call or not.

<table>
<thead>
<tr>
<th>This icon...</th>
<th>Indicates that...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>the call was answered.</td>
</tr>
<tr>
<td></td>
<td>the call was not answered.</td>
</tr>
</tbody>
</table>
The Outgoing tab shows the names of people you called, the time and duration of the calls, and their SIP addresses.

Network-based call logs capture all missed calls whether a caller leaves a voice mail or disconnects without leaving a voice mail.

**Calling contacts from the call log**

To call a contact from the call logs,

1. Login to the Personal Agent.
2. In the Call Logs portlet, select the **Incoming** or **Outgoing** tab.
3. Select a call log.
4. Click **Call**.  
   OR  
   Double-click the call log.  
   The Click To Call window opens. See “Managing Click to Call” on page 25.

**Saving contacts from the call log information**

To save a contact from a call log to your Personal Address Book,

1. Login to the Personal Agent.
2. In the Call Logs portlet, select the **Incoming** or **Outgoing** tab.
3. Select a call log.
4. Click the **Add to Personal Address Book** icon in the bottom left.
5. Click **OK**.

**Clearing call log information**

To remove one or more entries in a call log,
1. Login to the Personal Agent.
2. In the Call Logs portlet, select the **Incoming** or **Outgoing** tab.
3. Select the call log you want to delete.
4. Click the arrow icon to the right of **Call**.
   The confirmation window appears.
5. Click **Yes** to confirm the deletion.
   The Call logs page refreshes and the entry is gone.
Managing your Address Book

The Address Book is available from the Personal Agent main or top navigation tabs. It enables you to

- create and maintain a Personal Address Book of your personal contacts and groups of contacts.
- access a Global Address Book of all users in your domain (if enabled in your system).
- call a contact from your Personal or Global Address Book.
- access details about a contact including their presence status on the system.

Topics in this section include:

- “Understanding Personal Agent address books” on page 73
- “Using your Personal Address Book” on page 74
- “Using the Global Address Book” on page 79

Remember that if your system administrator has disabled the Global Address Book for your domain, you will not see the option to select the Global Address Book in the SEARCH drop-down list.

Understanding Personal Agent address books

The following address books are available in the Personal Agent:

- Personal Address Book contains contact information that you configure.
Global Address Book (if enabled in your system) contains contact information (maintained by your system administrator and for reference only) of all users in your domain.

**Tip:** Information in your Personal and Global (if enabled) Address Book can be used as a condition when defining a route to handle your incoming calls. For more information, see “Managing Routes” on page 57.

The following figure identifies the buttons available to you on the Personal Agent Address Book page. Not all buttons may appear, depending on the services assigned to you by your system administrator.

**Using your Personal Address Book**

Your Personal Address Book is a dynamic list of contacts, which you maintain. It lists the nickname, first name, and last name of your contacts. You can also view and define a group for the contact to belong to and whether or not to include the contact in your list of Friends.

**Tip:** Anytime you add a contact or make a change to a contact using the Personal Agent, your Personal Address Book automatically updates and synchronizes with the AS 5300 UC Client, AS 5300 Web Client, AS 5300 Office Client, and Avaya IP Deskphone, enabling you to view your Friends online from any of these devices.
Managing the contacts in your Personal Address Book

Your Personal Address Book helps you manage, track, and access information about all of your key contacts.

Adding a new group

You can create a group in which to place your contacts. For example, you can create a group called Work for your office contacts, and another group called Personal for your personal contacts. To add a new group,

1. Login to the Personal Agent.
2. In the Address Book portlet, select the Group icon in the bottom left. The Groups window opens.
3. Enter a group name.
4. Click Add.

Adding a contact

The maximum number of contacts that you can add to your Personal Address Book is dependent on limits configured by your system administrator.

To add a contact to your Personal Address Book,

1. Login to the Personal Agent.
2. In the Address Book portlet, click the Add New icon at the bottom left. The Add new entry page appears.
3. Complete the fields with your contact’s personal information. Required fields are indicated with an asterisk (*).

Tip: The information you add as your contact’s nickname is displayed where applicable, in all modes of the AS 5300 UC Client and AS 5300 Office Client.
To add the new contact to a group, select a group from the Group drop-down list.

Click Apply.

**Designating a contact as a Friend**

Presence must be enabled to be able to designate a contact as a Friend in your Personal Address Book. Your administrator configures the maximum number of contacts that you can designate as Friends. By designating a contact as a Friend, you are able to view their activity by clicking the **Friends Online** icon in the AS 5300 UC Client, AS 5300 Office Client, or the AS 5300 Web Client. For more information, see **Avaya Aura™ Application Server 5300 UC Client User Guide** (NN42040-107) and **Avaya Aura™ Application Server 5300 Office Client User Guide** (NN42040-114).

The Personal Agent enables you to create, view, and update a contact as a Friend. Friends can be people that you work with or correspond with regularly.

To designate a contact as a Friend,

1. Select a contact in your address book.

**Tip:** Application Server 5300 supports the + (plus) format as an international number designator when placed in the first position of a Directory Number (DN) or alias.

**Tip:** If your contact has a user ID for an external community, enter that information in the SIP address field. Using the external community user name for "user", the SIP address must be formatted as follows:

- Jabber: as specified by your service provider or company administrator
- AOL: "user@aol"
- MSN: For the hotmail.com domain, use "user@msn", and for other MSN domains use "user@msn.domain".
- Yahoo: "user@yahoo"
- Google Talk: For the gmail.com domain, use "user@gmail", and for other Google Talk domains, use "user@gtalk.domain".
2 Right-click the Contact Actions button, and select **Friend**. The contact you designated as a Friend now appears in your Personal Address Book with the **Friend** icon in the **Friend** column.

3 To delete a contact as a Friend, uncheck the checkmark next to the **Friend** icon in the contact details page.

4 Click **Apply**.

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**Tip:** You can also use the AS 5300 UC Client, AS 5300 Web Client, AS 5300 Office Client, or Avaya IP Deskphone to see whether or not a Friend is online.

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**Editing a contact**

There can be times when you want to modify information about a contact in your address book. To edit details about a contact,

1 Login to the Personal Agent.
2 In the Address Book portlet, select the contact that you want to edit.
3 Click the arrow icon at the bottom of the Address Book portlet.
4 Select **Edit**.
5 Make the desired changes.
6 Click **Apply**.
7 Click **Back** to return to your Personal Address Book.

**Deleting a contact**

To delete a contact (or a number of contacts) to delete,

1 Login to the Personal Agent.
2 In the Address Book portlet, select the contact that you want to delete.
3 Click the arrow icon at the bottom of the Address Book portlet.
4 Select **Delete**.
   A confirmation window appears.
5  Click Yes.
    The Address Book portlet refreshes.

**Viewing your contacts**

To view your Personal Address Book contacts, login to the Personal Agent. By default the Personal Address Book is open.

**Sorting your contacts**

To sort your contacts, click a column name (for example, **Friend**, **Nickname**, **Last name**, **First name**, or **Group**). Click the column name again to sort in reverse.

Remember that you might have to sort users each time you open the Global Address Book.

**Searching for a contact**

To search for a contact,

1  Login to the Personal Agent.
2  In the Address Book portlet, enter a search string in the field provided.
    The list of contacts updates to match your entry.

---

**Tip:** You can enter a wildcard symbol (*) at the beginning or end of a search string. For example, searching for *en will return all contacts named Ben, Jen, and so on. Use quotation marks before and after a search string to specify an exact match. For a complete list of the search criteria see “Understanding address book search criteria” on page 111.

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**Viewing details about a contact**

To view details about a contact,

1  Login to the Personal Agent.
2  In the Address Book portlet, select the desired contact.
3 Click the arrow icon at the bottom of the Address Book portlet.
4 Select Details

**Initiating a call to a Personal Address Book contact**

To call a contact using the Personal Address Book,

1 Login to the Personal Agent.
2 In the Address Book portlet, select the desired contact.
3 Click Call.
   The Click to Call page appears. See “Managing Click to Call” on page 25, for complete information on using Click To Call.

**Viewing all contacts**

To display all the contacts in your Personal Address Book, click View All.

**Using the Global Address Book**

Your Global Address Book is a directory of all users in your domain. This list is created and maintained by your service provider or system administrator.

However, if your system administrator has disabled the Global Address Book for your domain, you will not see the option to select the Global Address Book in the SEARCH drop-down list.

**Accessing the Global Address Book**

To access the Global Address Book (if enabled),

1 Login to the Personal Agent.
2 In the Address Book portlet, select **Global Address Book** from the Search drop down list.
Working with the Global Address Book

The Global Address Book enables you to access a single, common, network-wide address book.

Sorting users

To sort users in the Global Address Book,

1 Login to the Personal Agent.
2 In the Address Book portlet, select Global Address Book from the Search drop down list.
3 Click a column name (for example, Last name, First name, Office, or Home).
4 Click the column name again to sort in reverse.

You might have to sort users each time you open the Global Address Book.

Searching for a user

To search for a user in the Global Address Book,

1 Login to the Personal Agent.
2 In the Address Book portlet, select Global Address Book from the Search drop down list.
3 Enter a search string in the field provided.
   The list of users updates to match your entry.

   Tip: You can enter a wildcard symbol (*) at the beginning or end of a search string. For example, searching for *en will return all users named Ben, Jen, and so on. Use quotation marks before and after a search string to specify an exact match. For a complete list of the search criteria see “Understanding address book search criteria” on page 111.

4 Click Return to my address book to access your Personal Address Book.
**Viewing user details**

To view details about a user in the Global Address Book,

1. Login to the Personal Agent.
2. In the Address Book portlet, select **Global Address Book** from the Search drop down list.
3. Select the desired user.
4. Click the arrow icon at the bottom of the Address Book portlet.
5. Select **Details**. A page appears listing details about the user, including an icon that indicates their presence status on the network.
6. Click **Close** to return to the Global Address Book page, or click **Add** to add this user as a contact in your Personal Address Book.

**Initiating a call to a Global Address Book user**

To initiate a call to a user in the Global Address Book (if enabled),

1. Login to the Personal Agent.
2. In the Address Book portlet, select **Global Address Book** from the Search drop down list.
3. Select the desired user.
4. Click **Call**. **OR**
   - Double-click on the contact name.
   - The Click To Call window appears.

For information on using Click To Call, see “Managing Click to Call” on page 25.

**Adding users from the Global Address Book to your Personal Address Book**

To select a user to add to your Personal Address Book from the Global Address Book, you must first perform a search in the Global Address Book to find the desired user. See “**Searching for a user**” on page 80.
1  Following the search, select the user (or number of users) you want to add to your Personal Address Book.

2  Click the **Add new entry to Personal Address Book** icon. The Adding address book entries window appears.

3  If you want to designate the new contact as a friend, select the **Add users as friends** checkbox.

4  Designate a group if desired.
   You will receive an error message if you attempt to add users from your Global Address Book that have the same **Last name** or **First name** as the **Nickname** field defined in your Personal Address Book.

5  Click **OK**.
   Your Personal Address Book appears, showing the entry you added from the Global Address Book.
Managing Uniform Call Distribution

Uniform Call Distribution (UCD) allows businesses to improve call-completion rates by matching incoming calls to available answering locations. UCD enables even distribution of incoming calls to a Listed Directory Number (LDN) or Uniform Resource Indicator (URI) over a group of subscribers associated with that LDN/URI. This group of subscribers is called a UCD group. Each subscriber in the UCD Group has its own directory numbers or URI.

There are two types of subscribers for every UCD Group: Agents and Administrators.

UCD has its own independent portlet on the Personal Agent through which agents and administrators see the details of UCD services and modify group or agent properties. UCD Administrators can login to the Personal Agent with their username and password to view and manage services and features of the UCD Groups for which they are responsible. To show the UCD portlet, the user must be a member of a UCD group or a UCD administrator.

Topics in this section include:

- UCD Agent window overview
- Configuring UCD Agent status
- Configuring UCD Queue Status
- UCD Administrator window overview
- Configuring and modifying Group Information parameters
- Adding or deleting group members
- Forcing out group members
- Configuring Queue Status
- Managing Group Routes
UCD Agent window overview

UCD agents login to the Personal Agent with their username and password to access their UCD services and features through the UCD Agent portlet.

The UCD Agent window has the following fields:

- **Group Name**: displays the name of the UCD Group to which the agent is assigned.
- **DN**: displays the DN of the UCD Group
- **Status**: displays UCD agent status (active or inactive) and allows agents to change their status for that UCD Group.
- **Queue Status**: displays the queue status of the UCD Group and allows agents to change the queue status for the group.

Configuring UCD Agent status

To receive UCD calls, UCD Agents must be active in a UCD group. An agent can be only assigned to one UCD group at a time. The group marks an agent as busy only when they directly receive a call from that UCD group. Each incoming call terminates on the agent who has been idle for the longest period of time. UCD agents can toggle their status (active or inactive) using the Personal Agent Uniform Call Distribution portlet.

Prerequisite

The UCD Group must have an assigned AS 5300 Session Manager profile.

To configure your UCD Agent status,

1. Login to the Personal Agent.
2. In the **Uniform Call Distribution** portlet, select the **Agent** tab. This step applies only if you are a UCD Group Administrator. If you are an agent, the Agent tab is your default view.
3. In the Agent tab, under **Agent Properties**, select your status from the **Status** drop down menu.
Select **Active** to configure your status as active to receive calls.
**OR**
Select **Inactive** to configure your status as inactive to not receive calls.

4 Click **Save**.

### Configuring UCD Queue Status

A UCD agent queue is a queue of available agents in a particular UCD Group, in the order they become available from previous calls. The UCD queue is priority based. The agent who has been idle for the longest time has the smallest priority value. You configure Queue Status from the Personal Agent UCD Agent portlet.

**Prerequisite**

The UCD Group must have an assigned AS 5300 Session Manager profile.

To configure your UCD Group Queue Status,

1 Login to the Personal Agent.

2 In the **Uniform Call Distribution** portlet, select the **Agent** tab.
   
   This step applies only if you are a UCD Group Administrator. If you are an agent, the Agent tab is your default view.

3 In the **Agent** tab, under **Group Properties**, select **Open** or **Closed** from the Queue Status drop down menu.

4 Click **Save**.

### UCD Administrator window overview

When you login as an Administrator, the UCD window has two tabs: Admin and Agent. The Admin tab displays UCD Group name(s) and allows you to select a specific UCD Group to view and manage. The Agent tab allows you to view and manage your personal UCD Agent and Queue services.

The Administrator tab has the following subtabs:

- Group Information: displays the following fields:
— Queue Closure: displays which option is used when the queue is closed (by either the administrator or agent). When “Announcement” is selected, incoming calls are terminated to MAS for announcement. When “Route” is selected, incoming calls are routed to a defined destination.

— Called Party: displays what information is sent to the caller. The Application Server 5300 sends agent information if “Agent” is selected or sends UCD Group information if “UCD Group” is selected.

— Process route: this option, if selected, allows the Agent to redirect an incoming UCD call to their route list. Otherwise agent route list is ignored and agent cannot redirect incoming UCD calls.

— Presentation Duration: displays (in seconds) how long a call can be presented to an available UCD Group Agent before the Application Server 5300 tries to find another available agent to make a new connection.

— Maximum Wait Time: displays the queue wait timeout (in seconds). If a caller stays more than the maximum wait time in queue without attempting, then the call is terminated to the MAS to inform the user that the call has terminated.

— Maximum Call Queue Size: displays the queue length threshold. Any incoming call after maximum call queue size is reached is terminated to MAS for announcement.

— Delay Announcement Interval: displays the number of minutes the Application Server 5300 waits before playing the delay announcement. When configured to five minutes, a caller listens to ringback for five minutes and then Application Server 5300 connects the caller to delay announcement.

See “Configuring and modifying Group Information parameters” on page 87 for more information on configuring and modifying Group Information parameters.

• Group Members: the Group Members subtab allows the UCD Group Administrator to add and delete agents for the group.

See “Adding or deleting group members” on page 88 for more information on adding new group members and deleting existing group members using the Group Members subtab.
• Group Features: the Group Features subtab allows the UCD Group administrator to perform user force outs and configures the group’s queue status. The administrator cannot activate an inactive agent. Queue activation can only be done if the group has an assigned AS 5300 Session Manager profile.

See “Forcing out group members” on page 88 for more information on forcing out group members and “Configuring Queue Status” on page 89 for modifying Queue Status using the Group Features subtab.

• Group Routes: the Group Routes subtab allows the UCD Group Administrator to create new routes, modify, copy, rename, and delete existing routes, and configure or edit the routing order. The UCD Group Administrator can create new routes based upon incoming calling party numbers, day and time of incoming call, and can also configure the devices to ring. The Route creation and modification tab has three collapsible panels; each panel can be expanded and collapsed independently by clicking the arrow button in the top right of the panel.

See “Managing Group Routes” on page 90 for more information on managing group routes using the Group Routes subtab.

Configuring and modifying Group Information parameters

UCD Administrators can configure and modify UCD Group Information parameters and thresholds using the Group Information subtab on the UCD portlet of the Personal Agent. For more information on UCD Group Information parameters see “UCD Administrator window overview” on page 85.

Prerequisite

• You must be a group administrator.

To configure or edit UCD Group Information parameters,

1 Login to the Personal Agent.
2 In the UCD portlet, within the Admin tab, click the desired group name.
3 Click Select Group.
   The Group Information subtab is selected by default.
4 Configure or modify the parameters as required.
Adding or deleting group members

UCD Administrators can add or delete UCD group members using the Group Members subtab on the UCD portlet of the Personal Agent. For more information on UCD Group Members subtab see “UCD Administrator window overview” on page 85.

Prerequisite

- You must be a Group Administrator.

To add or delete UCD group members,

1. Login to the Personal Agent.
2. In the UCD portlet, within the Admin tab, click the desired group name.
3. Click Select Group.
4. Select the Group Members subtab.
5. To add a new member, enter the new member’s username in the Add New Agent field.
6. Click Add To Group.
7. To delete an existing member, select the user name of the member to be deleted from the List of Agents field.
8. Click Delete Selected Users.

Forcing out group members

UCD Administrators can force out members of a UCD group using the Group Features subtab on the UCD portlet of the Personal Agent. For more information on UCD Group Features subtab see “UCD Administrator window overview” on page 85.

Prerequisite

- You must be a group administrator.
To force out UCD group members,

1. Login to the Personal Agent.
2. In the UCD portlet, within the Admin tab, click the desired group name.
3. Click Select Group.
4. Click the Group Features subtab.
5. Select a username from the List of Active Agents pick list.
6. Click Force Out Selected User.

**Configuring Queue Status**

UCD Administrators can configure the queue status of a UCD group using the Group Features subtab on the UCD portlet of the Personal Agent. For more information on UCD Group Features, see “UCD Administrator window overview” on page 85.

**Prerequisite**
- You must be a Group Administrator.

To configure the queue status of a UCD group,

1. Login to the Personal Agent.
2. In the UCD portlet, within the Admin tab, click the desired group name.
3. Click Select Group.
4. Click the Group Features subtab.
5. Click Queue Status.
6. Select Open or Closed from the Queue Status pick list.
Managing Group Routes

UCD Administrators can manage (add, delete, copy, modify, copy, rename) UCD group routes using the Group Routes subtab on the UCD portlet of the Personal Agent. For more information on UCD Group Routes, see “UCD Administrator window overview” on page 85. Administrators perform the following functions using the Group Routes tab:

- Adding a group route
- Modifying a group route
- Copying a group route
- Renaming a group route
- Deleting a group route
- Changing the order of a group route

Adding a group route

UCD Administrators can add new UCD group routes using the Group Routes subtab on the UCD portlet of the Personal Agent.

Prerequisite

- You must be a group administrator.

To add a new UCD group route:

1. Login to the Personal Agent.
2. In the UCD portlet, within the Admin tab, click the desired group name.
3. Click Select Group.
4. Click the Group Routes subtab.
5. Click New.
6. Enter a name for the new route in the Route Name field.
7. To create a route based on incoming calls by number, click the check box beside Incoming From: These Numbers.
   OR
   To create a route including calls received during a day and time range, click
the check box beside Received: Day/Time panel. This enables the rules defined by the selected panel to be applied to the route.

8 To define the rules for Incoming From: These Numbers, click the arrow button located to the right of the Incoming From: These Numbers panel to expand that panel.

9 Enter the directory numbers in the left pane.

10 Click Add to List.

11 Check Include anonymous callers to include anonymous callers in the list.

12 To define the rules used for Received: Day/Time panel, click the arrow button located to the right of the Received: Day/Time pane to expand that panel.

13 Select a day and time range by clicking on the appropriate day and time blocks.

14 Click the check box beside Ring Devices in this order panel. This enables the rule defined by this panel to be applied to the route.

15 Click the arrow button located to the right of the Ring devices in this order panel to expand that panel.

16 Enter the directory number(s) of the device(s) to be called. You must provide at least one device to call before the new route information can be saved.

17 Specify the number of rings in the Number of Rings pick list. Select Indefinitely, if you want to the destination device to ring indefinitely.

18 Click Save. The main Group Routes window appears.

19 Click Save again.

Modifying a group route

UCD Administrators can modify existing UCD group routes using the Group Routes subtab on the UCD portlet of the Personal Agent.

Prerequisite

- You must be a group administrator.
To modify an existing UCD group route:

1. Login to the Personal Agent.
2. In the UCD portlet, within the Admin tab, click the desired group name.
3. Click Select Group.
4. Click the Group Routes subtab.
5. From the Routing Order pick list, click the route to be modified.
6. Click Modify.
7. In the window that appears, make changes as required in the Incoming From: These Numbers, Received: Day/Time, Ring devices in this order panels. See “Adding a group route” on page 90 for information on how to configure the parameters in these panels.
8. Click Save.
   The main Group Routes window appears.
9. Click Save again.

**Copying a group route**

UCD Administrators can copy UCD group routes using the Group Routes subtab on the UCD portlet of the Personal Agent.

**Prerequisite**
- You must be a group administrator.

To copy a UCD group route:

1. Login to the Personal Agent.
2. In the UCD portlet, within the Admin tab, click the desired group name.
3. Click Select Group.
4. Click the Group Routes subtab.
5. From the Routing Order pick list, select the route to be copied.
6. Click Copy.
   A dialog box appears.
7 Enter a name for the new route.
8 Click Save.

Renaming a group route

UCD Administrators can rename an existing UCD group routes using the Group Routes subtab on the UCD portlet of the Personal Agent.

Prerequisite
• You have to be a group administrator.

To rename an existing UCD group route:
1 Login to the Personal Agent.
2 In the UCD portlet, within the Admin tab, click the desired group name.
3 Click Select Group.
4 Click the Group Routes subtab.
5 From the Routing Order pick list, click the route to be renamed.
6 Click Rename.
   A dialog box appears.
7 Enter a new name for the route.
8 Click Save.

Deleting a group route

UCD Administrators can delete UCD group routes using the Group Routes subtab on the UCD portlet of the Personal Agent.

Prerequisite
• You have to be a group administrator.

To delete a UCD group route:
1 Login to the Personal Agent.
2 In the UCD portlet, within the Admin tab, click the desired group name.
3 Click Select Group.
4 Click the Group Routes subtab.
5 From the Routing Order pick list, click the route to be deleted.
6 Click Delete.
7 Click Save.

Changing the order of a group route

UCD Administrators can change the order of UCD group routes using the Group Routes subtab on the UCD portlet of the Personal Agent.

Prerequisite

- You must be a group administrator.

To change the order of a UCD group route:

1 Login to the Personal Agent.
2 In the UCD portlet, within the Admin tab, click the desired group name.
3 Click Select Group.
4 Click the Group Routes subtab.
5 From the Routing Order pick list, click the route whose order is to be changed.
6 Click Move Up or Move Down.
7 Click Save.
Managing Assistant Console and Services

Assistant support enables you to designate other Application Server 5300 users to act as primary and alternate assistants. Assistants can monitor, transfer, or route incoming and outgoing calls for you, the assisted user. This service must be enabled.

As an assisted user, you can select a default route to be used for Assistant Service. You can select whether to redirect calls to your own voice mail service or an assistant voice mail service, and configure the number of times a phone can ring before the unanswered call is forwarded to an alternate assistant, who makes the routing decision.

If you are an assisted user, the users assisting you are automatically approved to receive presence information. For more information on presence notification and authorizations, see “Viewing and modifying Presence” on page 45.

Topics in this section include:

- “Assisted User” on page 95
- “Assistant” on page 97

Assisted User

As an assisted user, you can add assistants to monitor, transfer, or route your incoming and outgoing calls.

- “Adding an Assistant” on page 96
- “Deleting an Assistant” on page 96
- “Configuring a Voicemail Assistant” on page 96
- “Configuring an Assistant Route” on page 97
Adding an Assistant

You add a Primary or Alternate assistant from the Assistant Console and Services Portlet.

To add an assistant,

1 Login to the Personal Agent.
2 In the Assistant Console and Services portlet, click on the Primary Assistant tab to add a Primary Assistant.
   OR
   Click on the Alternate Assistant tab to add an Alternate Assistant.
3 Enter a valid user name in the Add New Assistant field.
4 Click Add.

Deleting an Assistant

You delete an assistant from the Assistant Console and Services Portlet.

To delete an Assistant:

1 Login to the Personal Agent
2 In the Assistant Console and Services portlet, click on the Primary Assistant tab to delete a Primary Assistant.
   OR
   Click on the Alternate Assistant tab to delete an Alternate Assistant.
3 Select an assistant from the Assistant field.
4 Click Delete.
5 Click OK in the Alert dialog box.

Configuring a Voicemail Assistant

You configure a Voicemail Assistant Route from the Assistant Console and Services portlet. You must have voice mail services assigned to you.

To configure a Voicemail Assistant Route:
1 Login to the Personal Agent
2 In the Assistant Console and Services portlet, click on the Primary Assistant tab or the Alternate Assistant tab.
3 Pick a voice mail assistant from the Voicemail Assistant drop down list.
4 Click Apply.
5 Click OK in the Voicemail Configuration dialog box.

**Configuring an Assistant Route**

You configure an Assistant Route from the Assistant Console and Services portlet.

To configure an Assistant Route:

1 Login to the Personal Agent
2 In the Assistant Console and Services portlet, click on the Assistant Route tab.
3 Select a route from the Route drop down menu. The list of routes is populated from the routes in your Routes portlet.
4 Click Apply.

**Assistant**

As an assistant to an assisted user or multiple assisted users, you can change the order of your assisted users, remove assisted users, and select or modify the routes used for your assisted users.

- “Changing assisted user order” on page 97
- “Removing assisted users” on page 98
- “Selecting an assistant route” on page 98
- “Modifying an assistant service route” on page 98

**Changing assisted user order**

To change the order of assisted users as they appear on the Assistant Console, 

1 Login to the Personal Agent.
2 In the Assistant Console and Services portlet, under the **Boss Display** tab, click on the desired assisted user.

3 Click **Up** or **Down** to move the assisted user in the list.

4 Click **Apply**.

**Removing assisted users**

To remove assisted users,

1 Login to the Personal Agent.

2 In the Assistant Console and Services portlet, under the **Boss Display** tab, click on the desired assisted user.

3 Click **Remove**.
   
   OR
   
   Click **Remove All** to remove all assisted users.

4 Click **Apply**.

**Selecting an assistant route**

1 Login to the Personal Agent.

2 In the Assistant Console and Services portlet, under the **Boss Display** tab, click on the assisted user for whom you want to select a route.

3 Click **Select Route**.
   
   A new window opens.

4 Select an assistant service route from the **Route** drop down list. The list of routes is populated from the routes in your Routes portlet.

5 Click **Apply**.
   
   The Assistant service route is updated.

**Modifying an assistant service route**

You can modify the routes listed, to specify how, where, and when to route calls for your assisted users.

To modify a route,
1 Login to the Personal Agent.
2 In the Assistant Console and Services window, in the Boss Display tab, click on the assisted user who's route you want to modify.
3 Click **Edit Route**.
   A new window appears for modifying routes.
4 In the Routes tab, select the route to be modified.
5 Using the tabs, modify the route as desired. For complete details on the tabs and their features, see “Managing Routes” on page 57.
   - **Routes**: allows you to add, delete, copy, rename, and change the order of routes.
   - **Initiate Action**: allows you to define what actions trigger the route. For example receiving a call or receiving an IM could trigger the route.
   - **Conditions**: allows you to configure filters to manage calls received. For example receiving a call from specific people in your Personal Address Book or receiving a call during a specified day/time range.
   - **Outcome Actions**: allows you to define what actions you would like to perform when a call is received. For example, when a call is received, ring my client first, then ring my office, and then send the call to voice mail.
   - **Exceptions**: allows you to define instances when the route should not apply. For example, when a call is received from specific people in your address book or from a specific phone number.
6 Click **OK** after each change.
Managing Call Pickup

Call Pickup allows you to pick up a call that is ringing on another device, as long as both subscribers belong to the same Call Pickup group. This increases call answering efficiency and provides better call handling.

Call Pickup is a provisionable service that can be assigned to you. Every user in a Call Pickup group must have the Call Pickup service assigned to them. The service must first be assigned to the domain that the users are in, before it can be assigned to the user.

Topics in this section include:

- Call Pickup Subscriber window overview
- Changing Call Pickup Agent status
- Call Pickup Admin window overview

Call Pickup Subscriber window overview

You can view the Call Pickup Subscriber window through the Personal Agent Call Pickup portlet.

The Call Pickup Subscriber window has the following fields:

- Agent Status: indicates whether the Call Pickup agent is active or inactive. It also allows agents to activate or deactivate themselves. Agent Status is the only field that is editable.
- Pickup Type Assigned: indicates the call pickup variants assigned to the agent
  — Group Call Pickup allows you to pickup a call that was presented to any member of the group to which you belong. You are typically notified of all available calls to the group and allowed to pick from that list of calls. Group call pickup is supported with Vertical Services Codes (VSC).
Directed Call Pick-up allows you to pickup a call that was presented to any member of the group by explicitly specifying a particular Group ID while picking up the call. The Group ID must be specified in one of two ways:

- Subscribe messages to identify the group for which the call is to be picked up. The call picked up is based on the Notification received.
- VSC which requires use of an access code, followed by the ringing group ID, to grab or answer the incoming call.

Targeted Call Pick-up allows you to explicitly specify the DN or userid of the subscriber whose ringing call you would like to pickup. The subscriber must be part of your assigned Call Pickup group in order for Targeted Call Pickup to work.

- Pickup Group Name: identifies the name of the Call Pickup group assigned to you.
- Group Identifier: this information is used when making a call to a CPU Group with SIP URL. The usage is equivalent to username of a subscriber so the identifier must be unique in the domain.
- Group Directory: the directory number assigned to the group. At least one Directory Number must be provided for a Call Pickup Group.
- Prefix Codes: the VSC codes assigned to you. VSC codes are the same for all call pickup agents in a given domain.

Changing Call Pickup Agent status

Call Pickup allows agents who are part of the same call pickup group to answer calls ringing on another agent's device. As a call pickup agent, you are able to modify your status to indicate whether you are Active or Inactive.

To modify your agent status,

1. Login to the Personal Agent.
2. In the Call Pickup Subscriber portlet, beside Agent Status, select Active or Inactive.
3. Click Save.
Call Pickup Admin window overview

You can view the Call Pickup Admin window using the Personal Agent Call Pickup portlet. The Call Pickup Admin window has two tabs, Group Info and Group Management. The Pickup Group Name field is visible above both tabs. This field identifies the name of the Call Pickup Group.

Click on the Group Info tab to view information specific to the group.

The Group Info tab has the following fields:

- Group Identifier: used when making a call to CPU Group with SIP URL. The usage is equivalent to username of a subscriber so the identifier must be unique in the domain.
- Group Directory Number: the directory number assigned to the group. At least one Directory Number should be provided for a Call Pickup Group.
- Maximum Call Queue Size: the maximum number of calls that can queue in this group.
- Maximum Group Size: the maximum number of users allowed in the group.
- Allow Active Subscription: controls whether Active Subscriptions are accepted or rejected by the group.

Click the Group Management tab to perform Group Management information tasks.

The Group Management tab has the following fields:

- Add new member: allows the administrator to add new members to this group.
- List of members: displays all members belonging to the group, also allows the administrator to deactivate or delete a member.

Modifying Call Pickup Group information

As an administrator of a Call Pickup Group, you can modify the Maximum Call Queue Size, Maximum Group Size, and activate/deactivate that group.

To modify Call Pickup Group information,
1. Login to the Personal Agent as an administrator of that group.
2. In the Call Pickup Admin portlet, in the **Pickup Group Name** field, click on a group name.
3. Click **Select**.
4. Click the **Group Info** tab.
5. Modify Maximum Call Queue Size, Maximum Group Size, and Allow Active Subscription as necessary.
6. Click **Save**.

**Adding a member to a group**

As an administrator of a Call Pickup Group, you can add members to that group.

To add a group member,

1. Login to the Personal Agent as an administrator of that group.
2. In the Call Pickup Admin portlet, in the **Pickup Group Name** field, click on a group name.
3. Click **Select**.
4. Click the **Group Management** tab.
5. Enter a member name in the **Add new member** field.
   You must enter a valid member name, for example: user@domain. Adding an invalid member name generates an error message.
6. Click **Add**.
   The new added member name appears in **List of Members**.

**Deleting a member from a group**

As an administrator of a Call Pickup Group, you can delete members from that group.

To delete a group member,

1. Login to the Personal Agent as an administrator of that group.
2 In the Call Pickup Admin portlet, in the **Pickup Group Name** field, click on a group name.

3 Click **Select**.

4 Click the **Group Management** tab.

5 Click on a member name in the **List of Members** field.

6 Click **Delete**.

7 Click **OK** in the confirmation dialog box to confirm that you want to delete the selected member.

The selected member name is no longer visible in **List of Members**.

### Deactivating members from a group

As an administrator of a Call Pickup Group you can deactivate members from that group.

To deactivate members from a group,

1 Login to the Personal Agent as an administrator of that group

2 In the Call Pickup Admin portlet, in the **Pickup Group Name** field, click on a group name.

3 Click **Select**.

4 Click the **Group Management** tab.

5 Click on a member name in the **List of Members** field.

6 Click **Deactivate**. A confirmation window appears.

7 Click **OK**.

The selected member name is no longer active in **List of Members**.
Managing Hunting

Hunting allows businesses to improve call completion rates by clustering their customer services agents into groups called Hunt groups. Hunt groups are a series of subscribers organized in such a way that if the first group member is busy the next group member is hunted (checked) and so on until a member of the group with no active call or session is found. A group member is not available if any of the group member's registered devices are busy, configure to a state of Do Not Disturb, or if the group member has a presence state of Unavailable. Hunting is useful in an environment where multiple individuals can answer incoming calls or sessions.

Topics in this section include:

- “Hunt Group Agent window overview” on page 107
- “Hunt Group Admin window overview” on page 108
- “Modifying Hunt Group settings” on page 109
- “Adding Hunt Group Members” on page 109
- “Modifying Hunt Group Member settings” on page 110

Hunt Group Agent window overview

You can view the Hunt Groups Agent window through the Personal Agent Hunt Groups portlet.

The Hunt Groups Agent window has the following fields:

- Group Name: name of the groups of which you are a member
- DN: Pilot directory number of the hunt group
- Stop Hunt: specifies whether hunting stops at the group member during the hunt sequence.

These fields are not editable.
Hunt Group Admin window overview

You can view the Hunt Groups Admin tab through the Hunt Groups portlet. The Hunt Group Admin tab has two tabs, Admin and Agent. The Admin tab has two additional tabs, Group Setting and Group Members. The Group Name field is visible to the left of both Group Setting and Group Members tabs. It displays the name of the Hunt Group.

The Group Settings tab has the following fields:

- **Group Type:** the type of Hunt group. The different types of groups are: Sequential Directory Number Hunting (SDNH), Circular Directory Number Hunting (CDNH), Multi Line Hunting (MLH), and Distributed Line Hunting (DLH).
- **DN:** Pilot directory number of the hunt group
- **URI:** the Pilot SIP Uniform Resource Indicator (URI) of the hunt group. Mandatory field except for SDNH and CDNH group types. The pilot URI must be uniquely routable across the system.
- **Agent call forward option:** determines the action to be taken when a hunt group member does not answer a call. The following call forwarding options are available:
  - **Hunt:** Hunting occurs if the first hunt group member does not answer the call.
  - **Route:** If the first hunt group member does not answer the call, then the call is forwarded using the CFGDA route.
  - **Route Local:** If the incoming call is from a subscriber within the hunt group's sub-domain and the first group member does not answer the call, then the call is forwarded using the CFGDA route. For subscribers calling from outside the hunt group's sub-domain, hunting occurs.
  - **Route Foreign:** If the incoming call is from a subscriber outside the hunt group's sub-domain and the first group member does not answer the call, then the call is forwarded using the CFGDA route. For subscribers calling from within the hunt group's sub-domain, hunting occurs.
- **Call Forward destination:** the directory number to which a call is forwarded if the call forwarding option is configured to Route. This field is ignored if call forwarding option is configured to Hunt.
Overflow option: the action to take if all members of the hunt group are busy. There are two types of overflow actions; Route and Announcement. If Announcement is selected, all hunt groups in the domain use the same generic hunt group announcement.

Overflow destination: the directory number to which a call is forwarded if all members of the Hunt group are busy and the overflow option is configured to Route. This field is ignored if overflow option is configured to Announcement.

The Group Members tab has the following fields:

- Add New Agent: allows the administrator to add a new agent to the Hunt group.
- Assign Stop Hunt: allows the administrator to stop an agent from hunting.
- List of Agents: the list of agents assigned to that Hunt group.

Modifying Hunt Group settings

As an administrator of a Hunt group, you can modify Hunt Group Member settings for your group.

To modify Hunt Group Member settings:

1. Login to the Personal Agent as Administrator.
2. In the Hunt Groups portlet, in the Group Name list, click on a Hunt Group name.
3. Click Select.
4. Click on the Group Settings tab.
5. Modify the Agent call forward, Call forward destination, Overflow option, and Overflow destination fields as required.
6. Click Save.

Adding Hunt Group Members

As an administrator of a Hunt group, you can add additional members to your Hunt group.
To add additional members:

1  Login to the Personal Agent as Administrator.
2  In the Hunt Groups portlet, in the **Group Name** list, click on a Hunt Group name.
3  Click **Select**.
4  Click on the **Group Members** tab.
5  Enter the name of the new agent in **Add New Agent**.
6  Click **Add to List**.

**Modifying Hunt Group Member settings**

As an administrator of a Hunt group, you can modify Hunting information for your group.

To modify Hunt group settings:

1  Login to the Personal Agent as Administrator.
2  In the Hunt Groups portlet, in the **Group Name** list, click on a Hunt Group name.
3  Click **Select**.
4  Click on the **Group Members** tab.
5  In the **List of Agents** field, click to select an agent.
6  Click the check box under **Stop Hunt** to stop that agent from Hunting, or click **Move Up** or **Move Down** to move the agent in the Hunting list, or **Delete** to delete the selected agent.
Understanding address book search criteria

Topics in this chapter include:

- “Personal address book search criteria” on page 111
- “Global Address Book search criteria” on page 111

The phone number field is case-sensitive in both the Personal and Global Address Books. All other fields are not case-sensitive.

Personal address book search criteria

At least three characters must be entered. An asterisk (*) character can be used at the beginning or end of the search criteria to indicate that an entry ends or starts with the specified characters.

The search criteria is compared against all of the address book fields (nickname, first name, last name, phone number, SIP address, and address book group name). If two words are used in the search, they are compared against the first and last name fields.

Global Address Book search criteria

At least three characters must be entered. An asterisk (*) character can be used at the beginning or end of the search criteria to indicate that an entry ends or starts with the specified characters.

The search criteria is compared against all of the address book fields (first name, last name, phone number, and SIP address). If two words are used in the search, they are compared against the first and last name fields.
Terms you should know

This section defines the terms and acronyms used in this guide.

Terms

The Personal Agent uses some terms that might be new to you. Take a moment to read through the explanations to familiarize yourself with the following terms.

Address

When a procedure instructs you to enter an address, it means entering either a telephone number or a Session Initiation Protocol (SIP) address. A SIP address is a unique identifier of users on the IP network. It has the same format as an email address, for example, jdoe@lab1.org, but it is not an email address. The network can identify where you are and route your calls by tracking your SIP address when you sign in to any AS 5300 UC Client, AS 5300 Web Client, AS 5300 Office Client, or Avaya IP Deskphone.

In order to make it easier to place calls, you can store addresses (SIP addresses or telephone numbers) in your Personal Address Book.

Click To Call

The Click To Call feature enables you to initiate a call from any device, for example, a Public Switched Telephone Network (PSTN phone) or registered Application Server 5300 SIP client, to a specified number.
Global Address Book

Your Global Address Book is a list of all users in your domain. This list, if enabled in your domain, is maintained by your service provider or system administrator. Using the Personal Agent, you can search for a Username/UserID, Name, First name, Last name, or phone number. You can initiate a call by clicking on an entry in your Global Address Book.

Personal Address Book

Your Personal Address Book is a key tool for managing contacts. You can save contact information for quick call (Click To Call) access as well as organize your contacts into groups. Your Personal Address Book is synchronized across all your network access devices. If you make a change in your Personal Address Book on the Personal Agent, the change automatically appears on your other network access devices (for example, your AS 5300 UC Client, AS 5300 Web Client, AS 5300 Office Client, or your Avaya IP Deskphone).

Friends

Within your Personal Address Book, you can designate entries as Friends. People that you contact frequently are good candidates as Friends. If you have marked an address book entry as a Friend, then you can see the online presence status for that entry in the AS 5300 UC Client, AS 5300 Web Client, AS 5300 Office Client, or Avaya IP Deskphone.

**Note:** The ability to designate entries as Friends is a feature of the Presence service and is dependent upon system configuration. If the system configuration does not support the Presence service, then you cannot designate entries as Friends.

Presence

- Presence: a service on the AS 5300 UC Client, AS 5300 Web Client, AS 5300 Office Client, or Avaya IP Deskphone that enables you to see the online status of other users on your network and also a way to alert others to your status.
Automatic presence: a service on the AS 5300 UC Client, AS 5300 Web Client, AS 5300 Office Client, or Avaya IP Deskphone that enables you to configure the system to automatically alert others when you are away from your PC or on the telephone.

**Note:** The ability to configure automatic presence notifications on the Personal Agent is dependent upon the system configuration. If your system configuration does not support automatic presence, then you will not be able to use the automatic presence feature.

Presence authorization: If configured, you can authorize each user (from your AS 5300 UC Client, or AS 5300 Office Client) who would like to receive your presence information. By default, all users are authorized. You can also configure specific users to always see your presence as Offline.

Presence indicators: You can determine the status of anyone registered in the system by querying your Personal Agent Global Address Book. This feature is extremely helpful when sending instant messages or after unanswered calls. The following table lists the Presence states.

<table>
<thead>
<tr>
<th>Presence Indicator</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Green Arrow" /></td>
<td>Active available</td>
<td>The user is active on their computer. This is an auto presence enabled state and is shown on the user's behalf.</td>
</tr>
<tr>
<td><img src="image" alt="Green Circle" /></td>
<td>Active on the phone</td>
<td>The user is active on a call on one of their clients. This is an auto presence enabled state and is shown on the user's behalf.</td>
</tr>
<tr>
<td><img src="image" alt="Green Circle" /></td>
<td>Connected</td>
<td>The user is registered on the network.</td>
</tr>
<tr>
<td><img src="image" alt="Yellow Circle" /></td>
<td>Connected inactive</td>
<td>The user has not used their computer for a period of time. The inactivity timer is configured in the Preferences portlet, under Personal, Presence, Preferences.</td>
</tr>
</tbody>
</table>
The Multilevel Precedence and Preemption (MLPP) feature introduces the concept of call priority. Each call in a system configured for MLPP has a priority (ROUTINE, PRIORITY, IMMEDIATE, FLASH or FLASH-OVERRIDE) associated with it. To place a priority call, you must have MLPP configured.

For information about using MLPP, see *Avaya Aura™ Application Server 5300 UC Client User Guide* (NN42040-107).

### Defining routes

With this service, you can define a route list in the Personal Agent. For more information, see “Managing Routes” on page 57. If you want to configure rules for rejecting calls from specific users, see “Advanced Call Routes” on page 64.
Vertical Service Code

A vertical service code (VSC) is a special telephone number that usually begins with the * (star) key on the keypad. VCSs, also referred to as star codes or feature codes, are used to trigger specific features and actions. For example, the VSC "*67" can be used to signal that the originator's identity should be blocked from presentation.

Acronyms

This guide uses the following acronyms:

- DN Directory Number
- IM Instant Message
- IP Internet Protocol
- MCP Multimedia Communication Portfolio
- PA Personal Agent
- PAD Personal Audio Device
- PIN Personal Identification Number
- PNG Portable Network Graphic
- PSTN Public Switched Telephone Network
- QoS Quality of Service
- SIP Session Initiation Protocol
- URL Universal Resource Locator (internet address)
- VSC Vertical Service Code
- VoIP Voice over IP
- XMPP Extensible Messaging and Presence Protocol
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