



## **Cisco Personal Assistant User Guide**

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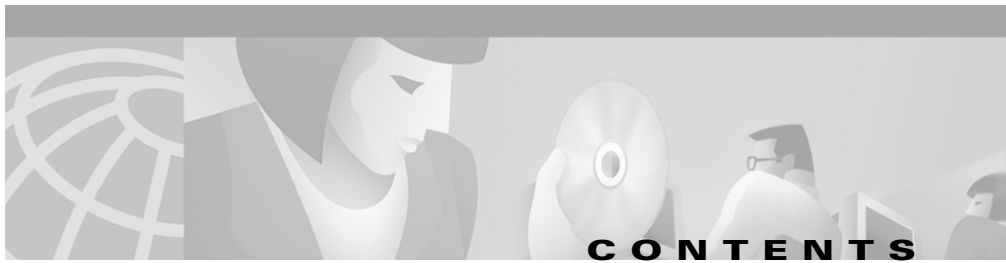
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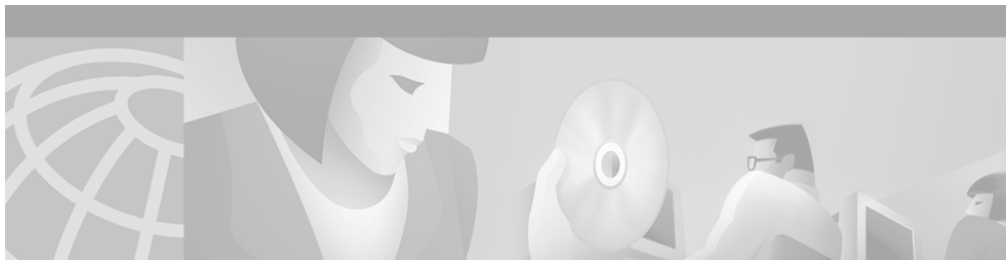


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## Preface

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This preface describes who should read this publication and its document conventions.

The preface covers these topics:

- Who Should Read This Publication, page xi
- Related Documentation, page xi
- What is Online Help?, page xii
- Obtaining Documentation, page xiii
- Obtaining Technical Assistance, page xiv

## Who Should Read This Publication

The Cisco Personal Assistant User Guide provides important tips, instructions and examples intended for anyone using Personal Assistant's features.

## Related Documentation

See the Cisco Unity User Guide for information about your Cisco Unity voice mail system.

# What is Online Help?

Cisco Personal Assistant's online help system provides task-oriented help as well as context-sensitive help available from every screen in the Cisco Personal Assistant User interface.

For example, if you are viewing the Rule-Sets page in the User interface and have a question, you can choose context-sensitive help to get information about that particular page. You can go to the help index to search for a specific key word, as well. For more information about accessing context-sensitive help, see the "Using Online Help" section on page xii.

For information about accessing the Personal Assistant User interface, see the "Where Do You Set Up Call Forwarding Rules?" section on page 13.

## Using Online Help

Once you log in to the Cisco Personal Assistant User interface, you can access online help in any of these ways:

- From the main menu along the top of the screen:
  - Choose **Help > Help for this screen** to access information about the page you are viewing. "Help for the screen" is another way of saying "context-sensitive help."
  - Choose **Help > Contents and Index** to access a list of help contents. Use the contents and index option to search for a specific topic or keyword, or to get an overview of how help is organized.
- To print a copy of Personal Assistant User Guide or to view an Adobe Acrobat version of the help system, click the **PDF** button in the top left of the help system. You need to have Adobe Acrobat installed (either as an independent application or as a plug-in to your browser), to view a printable copy of the entire document this way.

From Acrobat, you can search the Personal Assistant User Guide, print the entire manual or selected pages, or read the manual online. Click the **Bookmarks and Page** button to view a table of contents for the document in the left-hand margin if it is not already displayed. These bookmarks provide an easy way to navigate through the document.

## Document Conventions

This document uses these conventions:

- Command paths in the Cisco Personal Assistant User interface are displayed in the following format: **Help>Help for this screen**
- Syntax descriptions of command line commands use **bold** for keywords that you must type exactly as shown, *italic* for variables that you replace with an appropriate value.

Notes use the following conventions:



---

**Note**

Means *reader take note*. Notes contain helpful suggestions or references to material not covered in the publication.

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Cautions use the following conventions:



---

**Caution**

Means *reader be careful*. In this situation, you might do something that could result in equipment damage or loss of data.

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## Obtaining Documentation

This sections contains tips and resources for obtaining documentation:

- World Wide Web, page xiii
- Documentation CD-ROM, page xiv
- Ordering Documentation, page xiv

## World Wide Web

You can access the most current Cisco documentation on the World Wide Web at <http://www.cisco.com>, <http://www-china.cisco.com>, or <http://www-europe.cisco.com>.

## Documentation CD-ROM

Cisco documentation and additional literature are available in a CD-ROM package, which ships with your product. The Documentation CD-ROM is updated monthly. Therefore, it is probably more current than printed documentation. The CD-ROM package is available as a single unit or as an annual subscription.

## Ordering Documentation

Registered CCO users can order the Documentation CD-ROM and other Cisco Product documentation through our online Subscription Services at <http://www.cisco.com/cgi-bin/subcat/kaojump.cgi>.

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## Obtaining Technical Assistance

Cisco provides Cisco Connection Online (CCO) as a starting point for all technical assistance. Warranty or maintenance contract customers can use the Technical Assistance Center. All customers can submit technical feedback on Cisco documentation using the web, e-mail, a self-addressed stamped response card included in printed documentation, or by sending mail to Cisco.

## Cisco Connection Online

Cisco continues to revolutionize how business is done on the Internet. Cisco Connection Online is the foundation of a suite of interactive, networked services that provides immediate, open access to Cisco information and resources at anytime, from anywhere in the world. This highly integrated Internet application is a powerful, easy-to-use tool for doing business with Cisco.

CCO's broad range of features and services helps customers and partners to streamline business processes and improve productivity. Through CCO, you will find information about Cisco and our networking solutions, services, and programs. In addition, you can resolve technical issues with online support

services, download and test software packages, and order Cisco learning materials and merchandise. Valuable online skill assessment, training, and certification programs are also available.

Customers and partners can self-register on CCO to obtain additional personalized information and services. Registered users may order products, check on the status of an order and view benefits specific to their relationships with Cisco.

You can access CCO in the following ways:

- WWW: [www.cisco.com](http://www.cisco.com)
- Telnet: [cco.cisco.com](http://cco.cisco.com)
- Modem using standard connection rates and the following terminal settings: VT100 emulation; 8 data bits; no parity; and 1 stop bit.
  - From North America, call 408 526-8070
  - From Europe, call 33 1 64 46 40 82

You can e-mail questions about using CCO to [cco-team@cisco.com](mailto:cco-team@cisco.com).

## Technical Assistance Center

The Cisco Technical Assistance Center (TAC) is available to warranty or maintenance contract customers who need technical assistance with a Cisco product that is under warranty or covered by a maintenance contract.

To display the TAC web site that includes links to technical support information and software upgrades and for requesting TAC support, use [www.cisco.com/techsupport](http://www.cisco.com/techsupport).

To contact by e-mail, use one of the following:

Language	E-mail Address
English	<a href="mailto:tac@cisco.com">tac@cisco.com</a>
Hanzi (Chinese)	<a href="mailto:chinese-tac@cisco.com">chinese-tac@cisco.com</a>
Kanji (Japanese)	<a href="mailto:japan-tac@cisco.com">japan-tac@cisco.com</a>
Hangul (Korean)	<a href="mailto:korea-tac@cisco.com">korea-tac@cisco.com</a>

Language	E-mail Address
Spanish	tac@cisco.com
Thai	thai-tac@cisco.com

In North America, TAC can be reached at 800 553-2447 or 408 526-7209. For other telephone numbers and TAC e-mail addresses worldwide, consult the following web site:

<http://www.cisco.com/warp/public/687/Directory/DirTAC.shtml>.

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You can e-mail your comments to [bug-doc@cisco.com](mailto:bug-doc@cisco.com).

To submit your comments by mail, for your convenience many documents contain a response card behind the front cover. Otherwise, you can mail your comments to the following address:

Cisco Systems, Inc.  
Document Resource Connection  
170 West Tasman Drive  
San Jose, CA 95134-9883

We appreciate and value your comments.





# Getting Started with Personal Assistant

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The following sections provide overviews and examples to get you comfortable and familiar with Cisco Personal Assistant.

Complete and detailed instructions about using the features introduced here can be found in other sections. Just click on the links in these sections to access more information.

- [What Personal Assistant Can Do for You, page 1-1](#)—A quick overview of the tasks Personal Assistant can perform to help you manage your calls.
- [Getting Started with Dialing and Conferencing, page 1-2](#)—Personal Assistant helps you place and receive calls, and helps you set up conference calls according to spoken commands that you give over the telephone.
- [Getting Started with Voice Mail Browsing, page 1-6](#)—Personal Assistant helps you access voice mail messages and send new messages through spoken commands.
- [Getting Started with Call Forwarding Rules, page 1-12](#)—Personal Assistant forwards your incoming calls according to rules that you set up.

## What Personal Assistant Can Do for You

Cisco Personal Assistant functions like a virtual assistant, selectively forwarding and screening your incoming calls and helping you make outgoing calls.

There are two main jobs that the Cisco Personal Assistant can perform to help you manage your calls:

- **Speech-enabled dialing, conferencing and voice mail browsing**—Personal Assistant helps you place and receive calls, and browse your voice mail according to the spoken commands you give over any telephone handset or headset. Personal Assistant’s speech-recognition capability allows you to use your voice instead of your key pad to give instructions over the phone.

You can start using Personal Assistant through your telephone right away. For some dialog samples to get you started, see the following sections:

- Getting Started with Dialing and Conferencing, page 1-2
- Getting Started with Voice Mail Browsing, page 1-6

- **Call forwarding and screening**—Personal Assistant forwards and screens your incoming calls according to rules you set up. Rules tell Personal Assistant *where* you want to receive your calls (a phone number, series of phone numbers, or an email-based paging address), and *which* calls you want forwarded (all incoming calls, or particular calls according to the identity of the caller, the time of day, and your meeting schedule). Additionally, rules can tell Personal Assistant to screen some or all of your incoming calls.

Set up your rules using the Personal Assistant User interface. For more information and examples, see these sections:

- Getting Started with Call Forwarding Rules, page 1-12
- Setting Up Rules for Handling Incoming Calls, page 6-1
- Using the Call Screening Feature, page 6-19

## Getting Started with Dialing and Conferencing

Personal Assistant can help you place and receive calls, and can set up conference calls using your spoken instructions.

You can start using spoken instructions with Personal Assistant right away. For help and keywords, see these sections:

- Dialing and Conferencing Sample Dialogs, page 1-3
- Using Speech-enabled Directory Dialing, page 2-4
- Using Personal Assistant to Set Up Conferences, page 2-10

## Dialing and Conferencing Sample Dialogs

The following are dialing and conferencing sample dialogs. These examples assume that you have already dialed Personal Assistant and are in the Personal Assistant main menu:

- Getting Started with Directory Dialing and Call Screening, page 1-3
- Getting Started with Conferencing, page 1-4
- Getting Started with the Personal Address Book, page 1-5

## Getting Started with Directory Dialing and Call Screening

**PA:** Welcome to Personal Assistant. What would you like to do? Say the full name of the person you are trying to call.

**You:** Mr. Knightly.

**PA:** I'm sorry, I didn't understand. Say the person's first and last name.

**You:** George Knightly.

**PA:** *(Plays a recording of Mr. Knightly saying his name...)* Is this correct?

**You:** Yes.

**PA:** Dialing. *(After a few rings...)* Please wait while locating.

**Knightly:** Hello. I knew it was you.

**You:** Hi. Did you set up PA to screen your calls? Before you answered, Personal Assistant told me, "Please wait while locating."

**Knightly:** Yeah, it's really easy. You just go to the Rule page in the Personal Assistant web site and select call screening.

**You:** So what does it sound like on your side?

**Knightly:** As soon as I pick up, PA says, “You have a call from--” and plays your recording of your name. Then PA says, “Press 1 to connect or press 2 to transfer the call to a different number. And there’s an option to send the call to voice mail.”

**You:** That’ll come in handy.

**Knightly:** And you can apply call screening to all your calls or to specific callers, depending on how you set up your rules.

**You:** So I should take this personally?

**Knightly:** Sure. I didn’t want to miss your call.

### Tips

When you ask Personal Assistant to place a call to a colleague, Personal Assistant plays a recording of your colleague saying his or her name. If the recording is not available, or if you are calling someone external to the corporate directory, Personal Assistant identifies the called party by telling you the party’s phone number.

### Related Topics

- Getting Started with Conferencing, page 1-4—For the next dialog sample
- Getting Started with the Personal Address Book, page 1-5—For the last dialog sample
- Using Speech-enabled Directory Dialing, page 2-4—For detailed instructions
- Using the Call Screening Feature, page 6-19—For detailed instructions

## Getting Started with Conferencing

**You:** Listen, Knightly, I’m calling to see if you want to have a quick conversation with Anne about the Randalls project. Is this a good time for me to set up a phone conference?

**Knightly:** Works for me.

**You:** I’ll get PA to call you right back.

**PA:** *(After you hang up and redial...)* Welcome to --

**You:** *(Interrupting...)* Conference.

**PA:** Say the name of the person you would like to conference in.

**You:** George Knightly.

**PA:** Adding George Knightly to the conference list from the corporate directory. Would you like to add more people to the conference?

**You:** Yes.

**PA:** Say the name of the person you would like to conference in.

**You:** Anne Weston.

**PA:** Adding Anne Weston to the conference list from the corporate directory. Would you like to add more people to the conference?

**You:** No.

**PA:** Please wait while I set up the conference... Successfully conferenced in George Knightly....Successfully conferenced in Anne Weston. Conferencing done.

**Anne:** Hi guys.

**George:** Hello, Anne.

**You:** George and I have some great news to share with you.

### Related Topics

- Getting Started with Directory Dialing and Call Screening, page 1-3—For the previous dialog sample
- Getting Started with the Personal Address Book, page 1-5—For the next dialog sample
- Using Personal Assistant to Set Up Conferences, page 2-10—For detailed instructions

## Getting Started with the Personal Address Book

Use the personal address book to store names and numbers for people who are not included in the corporate directory, including customers, suppliers, family members and friends. Additionally, use the personal address book as a place to store copied entries from the corporate directory in order to personalize those entries. For example, you might want to use a nickname for a colleague whose full name is hard to pronounce, or you might want to add a home phone number for a colleague whose home number is not listed in the corporate directory. For instructions, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6.

Here's an example dialog with callers from your personal address book.

**PA:** Welcome to Personal Assistant. What would you like to do?

**You:** Get me "Boss" on his pager.

**PA:** Paging Mr. Woodhouse from the corporate directory. Is this correct?

**You:** Yes.

**PA:** Page sent. What else would you like to do?

**You:** Call "fund-raisers."

**PA:** Calling...555-7755 from the personal address book.

**Called party:** Thanks for calling Bates & Bates. How may I help you?...

**You:** *(After you have ended your call with Bates & Bates and speed-dialed Personal Assistant...)* Call Dad on his home phone.

**PA:** Calling...555-9989....from the personal address book.

**Dad:** Hello?

**You:** Hi, Dad. I thought you might be home.

### Related Topics

- Getting Started with Directory Dialing and Call Screening, page 1-3—For the first dialog sample
- Getting Started with Conferencing, page 1-4—For the previous dialog sample
- Setting Up Your Personal Address Book, page 4-1—For detailed instructions

## Getting Started with Voice Mail Browsing

Assuming that you already have access to Cisco Unity voice mail and have established both an extension and password, you can start using Personal Assistant right away to browse your messages and send new messages.

If you are unsure about whether or not you have Cisco Unity voice mail, contact your system administrator.

You can browse your voice mail using a few keywords. For help with these, see the following sections:

- Logging in to Voice Mail, page 1-7—Getting started information
- Voice Mail Browsing Sample Dialogs, page 1-8—Getting started examples
- Browsing Your Voice Mail with Personal Assistant, page 2-14—Complete and detailed instructions and voice mail commands

## Logging in to Voice Mail

To get started with voice mail browsing, simply dial Cisco Personal Assistant and say “Voice mail” or “Check messages.” The next steps vary depending on the phone from which you are calling:

- If you are calling from your desk phone, Personal Assistant asks for your password.
- If you are calling from a colleague’s desk phone (or an internal line other than your own), say “new mailbox” or “new extension.” Personal Assistant asks you to provide your mailbox extension number before you can enter your password.
- If you are calling from a home phone or other personal line, and if you have not established the line as a “personal destination,” Personal Assistant asks you to provide your mailbox extension number. Next, Personal Assistant asks you to enter your password.

To establish the line as a personal destination, see the “Adding Personal Destinations” section on page 3-2.



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**Note**

The voice mail password that you need to give Personal Assistant is the same numeric password that you have established with your Cisco Unity voice mail system. You can enter the password on your telephone key pad or you can say the password aloud.

---

The following sections provide examples and valid commands to help you get started with voice mail:

- Voice Mail Browsing Sample Dialogs, page 1-8
- Navigating the Main Menu, page 2-16
- Using Spoken Commands While Listening to Messages, page 2-21

## Voice Mail Browsing Sample Dialogs

The following are sample dialogs for voice mail browsing using Personal Assistant:

- Listening to an Urgent Message and Calling Back, page 1-8
- Listing Headers, Replaying a Message, Pausing Personal Assistant, page 1-9
- Returning to the Main Menu, Forwarding and Deleting a Message, page 1-10

### Listening to an Urgent Message and Calling Back

**PA:** Welcome to Personal Assistant. What would you like to do?

**You:** Voice mail.

**PA:** Welcome to voice mail. Please say your voice mail extension.  
(Personal Assistant asks for your extension in voice mail when it does not recognize the line from which you are calling.)

**You:** (*Saying your extension...*) 9-8-7-6. (You can also enter your extension using your touch tone key pad.)

**PA:** Please enter your password.

**You:** (*Enter your password on your touch tone key pad.*)

**PA:** You have three new and two old messages. One message marked urgent. Voice mail main menu. What would you like to do?

**You:** List headers.

**PA:** Message one, marked urgent. Received today, at 7:45 a.m., 5 seconds, from George Knightly. What would you like to do next?

**You:** Read it.

**PA:** “Big news on the Randalls project. Woodhouse came on board last night. Give me a call as soon as you can.”

**PA:** What would you like to do next?

**You:** Call back.

**PA:** (*Dials the number for George Knightly.*)



**Tips**

- After connecting a call, Personal Assistant no longer participates in the call. To reach Personal Assistant after a call has connected, hang up and redial the phone number for Personal Assistant.
- The voice mail password that you need to give Personal Assistant is the same numeric password that you have established with your Cisco Unity voice mail system. You can enter the password on your telephone key pad or you can say the password aloud.

**Related Topics**

- Listing Headers, Replaying a Message, Pausing Personal Assistant, page 1-9—For the next dialog sample
- Listening to an Urgent Message and Calling Back, page 1-8—For the last dialog sample
- Browsing Your Voice Mail with Personal Assistant, page 2-14—For detailed instructions

## Listing Headers, Replaying a Message, Pausing Personal Assistant

**PA:** Welcome to Personal Assistant. What would you like to do?

**You:** Voice mail.

**PA:** Please enter your password.

**You:** *(Enter your password on your touch tone key pad.)*

**PA:** You have two new and three old messages. One message marked urgent. Voice mail main menu. What would you like to do?

**You:** List headers.

**PA:** Message one received today, 8:56 a.m., 44 seconds, from extension 1-2-3-4-5.

What would you like to do next?

**You:** Next message.

**PA:** Message two received today--

**You:** *(Interrupting...)* Skip to last message.

**PA:** Message five received January fourteenth at 5:33 p.m., 8 seconds, from an outside caller. What would you like to do next?

**You:** Read it.

**PA:** Dad, here. Your sister's coming in next Saturday at noon. Flight 8990 on United. Or, no, flight 8909. Let me know if you can pick her up.

**PA:** What would you like to do next?

**You:** Repeat.

**PA:** "Dad, here...." What would you like to do next?

**You:** (*Press the **Hold** button on your telephone.*)

### Tips

Enabling the hold feature on your telephone puts Personal Assistant on temporary standby. This means that your current dialog with Personal Assistant is put on hold and resumes when you disable the hold feature. Note that certain operations need to be re-initiated after you pause Personal Assistant. For example, you need to tell Personal Assistant to replay a message if you enabled hold while listening to the message.

### Related Topics

- Listening to an Urgent Message and Calling Back, page 1-8—For the previous dialog sample
- Returning to the Main Menu, Forwarding and Deleting a Message, page 1-10—For the next dialog sample
- Browsing Your Voice Mail with Personal Assistant, page 2-14—For detailed instructions

## Returning to the Main Menu, Forwarding and Deleting a Message

**You:** (*Press the **Hold** or **Resume** button on your telephone to take Personal Assistant off of hold.*)

**PA:** What else would you like to do?

**You:** Cancel.

**PA:** Voice mail main menu. What would you like to do?

**You:** How many messages do I have?

**PA:** You have two new and three old messages. One message marked urgent.

**You:** Read messages from George Knightly.

**PA:** You have one old message from George Knightly. Message 1, marked urgent, received today at 7:45 a.m. “Big news....” What would you like to do next?

**You:** Forward it.

**PA:** Please say the full name of the person you want to forward the message to.

**You:** Anne Weston.

**PA:** *(Plays a recording of Anne saying her name...)* Is this correct?

**You:** Yes.

**PA:** Do you want to include an introduction to this message?

**You:** Yes.

**PA:** Please record your message after the tone. Press the pound key when finished.

**You:** Anne, here’s the good news from George. I thought you’d want to hear it straight from the source. *(Press #.)*

**PA:** To send this message, please press or say 1. To listen to your recording--

**You:** Send it.

**PA:** Message sent. Back to the message you were listening to. You are at message one. What would you like to do next?

**You:** Delete message.

**PA:** Message deleted. What would you like to do next?

### Tips

Say “Cancel” during a task to interrupt that task. Otherwise, say “Cancel” to exit the current menu and return to the main menu.

### Related Topics

- Listening to an Urgent Message and Calling Back, page 1-8—For the first dialog sample
- Listing Headers, Replaying a Message, Pausing Personal Assistant, page 1-9—For the previous dialog sample
- Browsing Your Voice Mail with Personal Assistant, page 2-14—For detailed instructions

# Getting Started with Call Forwarding Rules

The following sections can help you set up rules for Personal Assistant:

- Four Ways Personal Assistant Can Forward Calls, page 1-12
- Where Do You Set Up Call Forwarding Rules?, page 1-13
- Getting Started from the Welcome Page, page 1-13
- Getting Started with Sample Information from the Welcome Page, page 1-15
- Quick Setup Example, page 1-16

## Four Ways Personal Assistant Can Forward Calls

Because Personal Assistant can selectively forward your incoming calls to other telephone numbers, an incoming call to your desk phone can be routed to your mobile phone, your home phone, or another phone, based on the rules you create. An incoming call can even generate an email-based page.

The details of your rules are unique to you, but rule combinations fall into four basic categories:

- A single caller to one destination—For example, “Send calls from my brother to my mobile phone.”
- Multiple callers to one destination—For example, “Send calls from any of my top clients to my mobile phone.”
- A single caller to many destinations—For example, “When my brother calls, try calling me on my desk phone, then try me on my home phone, then try me on my mobile phone.”
- Multiple callers to many destinations—For example, “When anyone from the project calls, try calling me in my hotel room, then try me in the conference room, then try me on my mobile phone.”

A destination is a phone number or email-based paging address where you want Personal Assistant to send your calls. Setting up rules can be as simple as choosing a destination. If you want Personal Assistant to send all of your incoming calls to your voice mail, for example, set up this destination in a rule.

**Related Topics**

- Where Do You Set Up Call Forwarding Rules?, page 1-13
- Getting Started from the Welcome Page, page 1-13
- Getting Started with Sample Information from the Welcome Page, page 1-15
- Quick Setup Example, page 1-16

## Where Do You Set Up Call Forwarding Rules?

Set up rules in the Cisco Personal Assistant User interface. The Personal Assistant User interface is an internal web site where you can enter information to communicate instructions for Personal Assistant. Access the interface through your web browser, using the URL supplied by your system administrator.

**Related Topics**

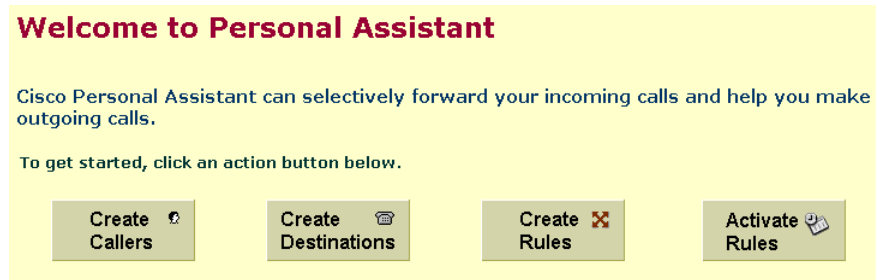
- Getting Started from the Welcome Page, page 1-13—For tips on navigating from the first page of the User interface
- Getting Started with Sample Information from the Welcome Page, page 1-15—For help finding and using sample rules stored in the interface
- Quick Setup Example, page 1-16—For a step-by-step example of how to set up a rule through the Personal Assistant User interface

## Getting Started from the Welcome Page

Use the Welcome page as a point of departure to explore the Personal Assistant User interface and return to the Welcome page as a way to orient yourself in the interface.

From the Welcome page, get started by clicking one of the four action buttons, as shown in Figure 1-1.

Figure 1-1



Each of the action buttons represents a sub-step toward the larger action of creating a new call-forwarding and screening rule. For example, click the **Create Callers** button to go to the Address Book page and the Caller Groups page. You can return to the Welcome page whenever you want to explore a new action.

The Welcome page is easy to find: The first time you log in to the Personal Assistant User interface and establish your password, the Welcome page opens automatically. The next time you log in to the interface, you can return to the Welcome page by choosing **Help > Welcome to Personal Assistant** from the main menu.

**Note**

You can access User interface pages through the main menu, as well as through the Welcome page. The main menu is displayed at the top of each page in the interface.

Most of the interface pages are stocked with sample information. For more information on how to use or delete samples, see the “Getting Started with Sample Information from the Welcome Page” section on page 1-15.

**Related Topics**

- What Personal Assistant Can Do for You, page 1-1
- Getting Started with Dialing and Conferencing, page 1-2
- Getting Started with Voice Mail Browsing, page 1-6
- Getting Started with Call Forwarding Rules, page 1-12

## Getting Started with Sample Information from the Welcome Page

You can find sample information on most of the pages in the Personal Assistant User Interface. For example, the address book page contains two sample address book entries and the Destination page contains a few sample destinations.

Click around and explore the sample information. It might be particularly helpful to explore sample information in conjunction with the Welcome page, where action buttons link to corresponding interface pages. See the “Getting Started from the Welcome Page” section on page 1-13 for more information on action buttons.

As you explore sample information in the interface, be sure to open the Rule-Sets page and look at the sample rule-set. From the Welcome page, click the **Create Rules** action button, or open the page from the main menu by choosing **Rules > Rule-Sets**. Once you get to the Rule-Sets page, open the sample rule-set by clicking the **plus icon**, then click the **text** of one of the two sample rules contained inside. Clicking on the text of a rule takes you to the Rule page where setup information for that particular rule is stored. Notice how sample information stored in other pages shows up in the Rules page. Use this sample rule as a model for setting up your own rules.

You can modify or delete samples when you are no longer using them. Or you can ignore them; because the samples are inert, they will not interfere with new information that you enter.

For deletion instructions, see the “Deleting Sample Information” section on page 1-15.

## Deleting Sample Information

To remove samples, delete the sample rule-set before deleting other sample information. Similarly, you must delete a destination group before you can delete destinations within that group. Follow these steps:

### Procedure

---

- Step 1** Open the Rule-Sets page in one of the following ways:
- From the Welcome page, click the **Create Rules** button.
  - From the main menu, choose **Rules > Rule Sets**.



**Step 2** Click the **delete icon** to the right of the “Sample Ruleset.”  
Personal Assistant asks you to verify your deletion request.

**Step 3** Click **OK**.

The rule-set is deleted. If you want to delete more samples, start by deleting the destination group, then delete the sample information stored in other pages.



---

**Note** If you have “activated” your sample rule-set, Personal Assistant displays an error message when you try to delete. De-activate the rule-set by returning to the Activate Rule-Sets page and choosing “click to select” in place of the rule-set name. Then click **Update**.

---

#### Related Topics

- What Personal Assistant Can Do for You, page 1-1
- Getting Started with Dialing and Conferencing, page 1-2
- Getting Started with Voice Mail Browsing, page 1-6
- Getting Started with Call Forwarding Rules, page 1-12
- Getting Started from the Welcome Page, page 1-13

## Quick Setup Example

This example illustrates how to set up a rule telling Personal Assistant to send your incoming calls from a single caller to a single destination. After following this example, you can create more advanced rule combinations. For an overview of rule combinations, see the “Four Ways Personal Assistant Can Forward Calls” section on page 1-12.

#### Procedure

---

**Step 1** Log in to access Personal Assistant.

The first time you log in, Personal Assistant prompts you to update your password and opens the Welcome page. The next time you log in, Personal Assistant opens the Rule-Sets page. Figure 1-2 shows the login prompt.



**Figure 1-2**


**Note** The initial default password for Personal Assistant is “changeme.” Use this password the first time you login.

- Step 2** Before you set up rules for Personal Assistant to follow, consider whose phone calls you want to forward, to what number, and on what schedule.
- For this example, you want calls from Harriet Smith forwarded to your mobile phone while you are on vacation. Now you need to create a rule-set and add a rule to it.
- Step 3** If the Rule-Sets page is not already open, choose **Rules > Rule-Sets** from the main menu.
- A rule-set is a container that holds one or more rules. You need to name a rule-set before you can add rules to it.
- Step 4** In the Rule-Set page, enter a name for your rule-set in the Rule-Set Name field. For example, “Work Week” might contain rules that you want to apply to Monday-Friday calls. In this example, you name your rule-set “vacation.” Figure 1-3 shows the Rule-Set Name field in the Rule-Set page.

**Figure 1-3**

- Step 5** Click the **Add Rule-Set** button.
- Personal Assistant creates your new rule-set and adds it to the List of Rule-Sets.
- Step 6** Now you need to add a rule to the rule-set. A rule is simply an instruction that you want Personal Assistant to follow. Access the rule page by clicking the **Add Rule** button to the right of your new rule-set. Figure 1-4 shows the Add Rule button.

**Figure 1-4**

Rule-Set Name	Active Period	Delete
<input type="checkbox"/> vacation	Inactive	<input type="button" value="Add Rule"/> <input alt="trash icon" type="image"/>

Personal Assistant opens the Rule page.

- Step 7** In the Rule page, you can tell Personal Assistant that you want to specify a caller, Harriet Smith, by name. Figure 1-5 shows the Caller Identity section of the Rule page.

**Figure 1-5**

Caller Identity: Use this section to specify "caller ID" criteria for this rule.

- Step 8** Use the first drop-down arrow to choose “is one of.”

- Step 9** Click the **Select Callers** button.

Personal Assistant displays the Caller Search window, as shown in Figure 1-6. Use this window to search for the caller you want the rule to apply to.

- Step 10** Use the drop-down arrow to choose either the **Corporate Directory** or the **Personal Address Book**. In this case, you want to search the corporate directory.

**Figure 1-6**

**Caller Search**

Look in:

First Name:

Last Name:

User ID\*\* :

- Step 11** Enter the first or last name of the caller you are looking for and click **Search**. You can also search by partial name.

Personal Assistant displays the results of your search, as shown in Figure 1-7.

Figure 1-7

Details	First Name	Last Name	User ID	Select
	John	Smith	jsmith	<input type="checkbox"/>
	Harriet	Smith	hsmith	<input checked="" type="checkbox"/>

62855

- Step 12** Select a caller from the list by checking the **Select** check box to right of the caller's name. Click **Add Selected** and **Close**.

Personal Assistant adds the caller you selected to the rule you are building and takes you back to the Rule page, as shown in Figure 1-8.

Figure 1-8

Caller Identity: Use this section to specify "caller ID" criteria for this rule.

If the caller   or

62838

- Step 13** In the Rule page, use the Destination drop-down arrow to choose a destination. In this example, choose your mobile phone, as shown in Figure 1-9.

Figure 1-9

Destination: Use this section to specify the destination and call screening behavior for this rule.

Direct the call to   and

65561

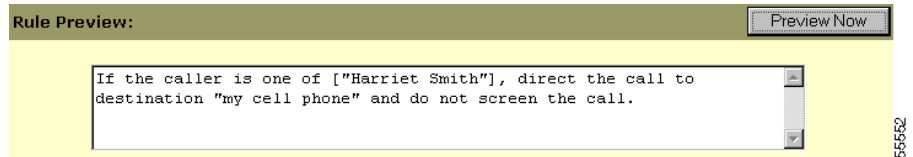
- Step 14** Choose a call screening option from the last drop-down menu, as shown in Figure 1-10. When you receive an incoming call that has been screened, Personal Assistant tells the caller to hold while identifying the caller for you. Personal Assistant then asks you to accept the call, forward the call to a different number, or send the call to voice mail. For more information, see the “Using the Call Screening Feature” section on page 6-19.

Figure 1-10

65563

- Step 15** Click **Preview Now**. Personal Assistant provides a text version of your new rule, as shown in Figure 1-11.

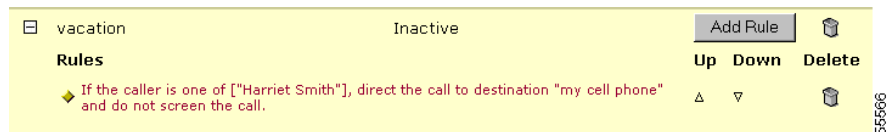
**Figure 1-11**



- Step 16** If you are satisfied with the rule, click the **Save** button. Or, you can make changes on the Rule page and preview the rule again.

After you click **Save**, Personal Assistant returns to the Rule-Set page, as shown in Figure 1-12. Notice that the new "vacation" rule-set is listed as "Inactive." Your rule-set cannot apply to your calls unless you activate it.

**Figure 1-12**

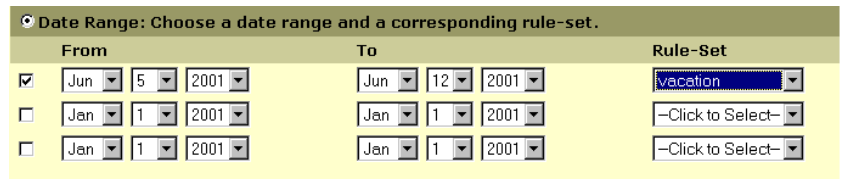


- Step 17** Choose **Rules >Activate Rule-Sets** from the main menu.

Personal Assistant opens the Activate Rule-Sets page.

- Step 18** Specify the day or date when you want your rule to take effect. In this case, you want to schedule the rule from June 5 - June 12, as shown in Figure 1-13.

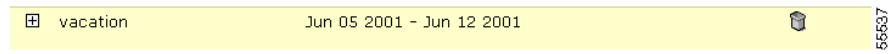
**Figure 1-13**



- Step 19** Using the **From** and **To** drop-down menus, select a date range for each rule-set that you want to schedule.
- Step 20** Choose the rule-set you want to schedule from the Rule-Set menu.
- Step 21** Click the **Update** button.
- Step 22** Choose **Rules > Rule-Set** from the main menu.

Personal Assistant opens the Rule-Set page. Notice that your rule-set is now scheduled, as shown in Figure 1-14.

**Figure 1-14**



Your Personal Assistant now has a rule to follow and a schedule for applying the rule to your incoming calls.

You can add more rules to the vacation rule-set or change the rule you have already created. You can also build a second rule-set and activate it according to a different schedule.

Finally, you can put your new rule to the test with a special testing tool. For instructions, see the “How to Use the Call Forwarding Rule Tester” section on page 8-1.

### Tips



- To delete a rule-set or any of its rules, click the corresponding **delete icon**. Note that you cannot delete a rule-set that is currently active. De-activate the rule-set by returning to the Activate Rule-Sets page and choosing “click to select” in place of the rule-set name. Then click **Update**.
- Choose a name for your rule-set that suggests when you want to schedule the rule-set. For example, “Work Week” for Monday through Friday, or “vacation” during a specific date range.
- The Rule page requires only that you specify a destination or destination group to which Personal Assistant can forward your incoming calls. You are not required to specify a caller or other criteria.

**Related Topics**

The “Quick Setup Example” section on page 1-16 is designed to provide a basic overview of the rule-building process; for more tips and detailed instructions, see any of these related topics:

- What Are Destinations?, page 3-1
- Creating a New Rule-Set, page 6-3
- Building Rules, page 6-5
- Activating a Rule-Set, page 6-15
- Using the Call Screening Feature, page 6-19
- How to Use the Call Forwarding Rule Tester, page 8-1



## Using Personal Assistant to Make Calls and Access Voice Mail

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Cisco Personal Assistant can understand your spoken instructions to help you make outbound calls, set up conference calls, and browse your voice mail.

You can start using Personal Assistant through your phone right away. Refer to these sections for more instructions and tables of valid commands:

- Accessing Personal Assistant over Your Phone, page 2-1
- Using Personal Assistant Main Menu Options, page 2-2
- Using Speech-enabled Directory Dialing, page 2-4
- Using Personal Assistant to Send and Receive Email-Based Paging Messages, page 2-8
- Using Personal Assistant to Set Up Conferences, page 2-10
- Using Introductory Phrases with Dialing and Conferencing Commands, page 2-13
- Browsing Your Voice Mail with Personal Assistant, page 2-14

## Accessing Personal Assistant over Your Phone

To access Personal Assistant over your telephone, dial the extension provided by your system administrator. You can save this number in your telephone's memory for quick access to Personal Assistant in the future.

The first time you call, Personal Assistant prompts you to record your spoken name. Personal Assistant uses this recording of your name to greet you and to announce your identity to other callers.

### **Related Topics**

Refer to the following sections for instructions about communicating with Personal Assistant:

- Using Personal Assistant Main Menu Options, page 2-2
- Using Speech-enabled Directory Dialing, page 2-4
- Using Personal Assistant to Send and Receive Email-Based Paging Messages, page 2-8
- Using Personal Assistant to Set Up Conferences, page 2-10
- Using Introductory Phrases with Dialing and Conferencing Commands, page 2-13
- Browsing Your Voice Mail with Personal Assistant, page 2-14

## **Using Personal Assistant Main Menu Options**

To access the main menu options shown in Table 2-1, simply call Personal Assistant. Personal Assistant greets you and asks what you want to do. Use any of the spoken commands listed in the table.



Table 2-1 Personal Assistant Main Menu Options

Spoken Command	What It Does	Where To Find More Details	Touch-Tone
“Voice mail”	Opens the voice mail menu.	<ul style="list-style-type: none"> <li>• See the “Getting Started with Voice Mail Browsing” section on page 1-6 for brief sample dialogs.</li> <li>• See the “Browsing Your Voice Mail with Personal Assistant” section on page 2-14 for complete instructions and commands.</li> </ul>	Press <b>1</b> or <b>1#</b>
“Conference”	Prompts Personal Assistant to set up a conference according to your directions.	<ul style="list-style-type: none"> <li>• See the “Getting Started with Dialing and Conferencing” section on page 1-2 for brief sample dialogs.</li> <li>• See the “Using Personal Assistant to Set Up Conferences” section on page 2-10 for complete instructions and commands.</li> </ul>	
“Call....”	Dials by: <ul style="list-style-type: none"> <li>• name</li> <li>• number</li> <li>• destination</li> <li>• nickname</li> </ul> Also directs a call to a pager.	<ul style="list-style-type: none"> <li>• See the “Getting Started with Dialing and Conferencing” section on page 1-2 for a brief sample dialogs.</li> <li>• See the “Using Speech-enabled Directory Dialing” section on page 2-4 for instructions and commands.</li> <li>• See the “Using Introductory Phrases with Dialing and Conferencing Commands” section on page 2-13 for a list of valid phrases besides “Call...”</li> </ul>	Enter the extension or number you want to reach.
“Spell by name”	Tells Personal Assistant that you want to spell the name of the party on your touch-tone key pad.	<ul style="list-style-type: none"> <li>• See the “Using Speech-enabled Directory Dialing” section on page 2-4 for instructions and commands.</li> </ul>	Press <b>2</b> or <b>2#</b>

**Note**

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If your system administrator has not purchased speech ports, these speech-enabled features are not available.

---

**Related Topics**

- Accessing Personal Assistant over Your Phone, page 2-1
- Using Speech-enabled Directory Dialing, page 2-4
- Using Personal Assistant to Send and Receive Email-Based Paging Messages, page 2-8
- Using Personal Assistant to Set Up Conferences, page 2-10
- Using Introductory Phrases with Dialing and Conferencing Commands, page 2-13
- Browsing Your Voice Mail with Personal Assistant, page 2-14

## Using Speech-enabled Directory Dialing

Speech-enabled directory dialing allows you to place a call through Personal Assistant by saying a person's name or phone number aloud. If you say, "Harriet Smith," or "Call Harriet Smith," for example, Personal Assistant uses speech-enabled dialing to obtain the telephone number of Harriet Smith from the corporate directory or from your personal address book.

You can set Personal Assistant to search only your address book for speech-enabled calls. For information about this option, see the "Setting the Name Dialing Preference" section on page 7-7.

The following steps describe how to place a call with Personal Assistant and the "dial-by" commands you can use:

**Procedure****Step 1**

---

Call Personal Assistant.

Personal Assistant greets you and asks what you want to do.

**Step 2** Tell Personal Assistant to place a call for you by saying any valid dialing commands.

- For common dialing commands, see Table 2-2.
- For optional introductory phrases, see Table 2-4.

If Personal Assistant clearly understands your spoken command, it confirms that it is dialing the person you want to call. For example, Personal Assistant says, “Calling George Knightly from the corporate directory.” Or “Calling 555-1234 from the personal address book.”



---

**Note** Personal Assistant can play a person’s recorded name for you only if the person has recorded his or her name. If a recorded name is not available, Personal Assistant uses the party’s desk extension or phone number.

---

**Step 3** At this point you can allow the call to connect or you can say “Cancel” to halt the last action without losing your connection to Personal Assistant.

If Personal Assistant does not understand your dialing command, it asks you to provide more information or to confirm the command. Personal Assistant also gives you helpful suggestions when you get stuck.

If you and your Personal Assistant are not communicating after several attempts, Personal Assistant might say, “Let’s start over” and cycle back to the beginning of the process. Or, if Personal Assistant continues to have problems understanding you, it might connect you to the system operator.

Table 2-2 Directory Dialing Commands






What You Want Personal Assistant to Do	What You Say	What Your Spoken Command Sounds Like	Touch-Tone
Dial by name	Say the person's first and last name.  <b>Note</b> You can preface a name with "Call." See Table 2-4 for more phrasing options.	<ul style="list-style-type: none"> <li>• "George Knightly"</li> <li>• "Call Frank Churchill"</li> <li>• "Dial Harriet Smith"</li> <li>• "Get me Philip Elton"</li> </ul>	
Dial by name and destination	Say the person's first and last name followed by the destination name or type.  <b>Note</b> If you do not specify a destination, Personal Assistant sends the call to the party's work phone.	<ul style="list-style-type: none"> <li>• "George Knightly on his mobile phone"</li> <li>• "Frank Churchill at home"</li> <li>• "Harriet Smith on her pager"</li> </ul>	
Dial by number	Say the extension or number.  <b>Note</b> You can preface a number with "Call." See Table 2-4 for more phrasing options.	<ul style="list-style-type: none"> <li>• "555 1234"</li> <li>• "Call 555 1234"</li> <li>• "Extension 3456"</li> <li>• "Dial 555 345 6789"</li> </ul>	Enter the extension or number you want to reach.
Dial with spell-by-name	Say "spell-by-name." Personal Assistant then prompts you to spell the name of the person you are calling on your touch-tone key pad.	"Spell by name"	Press <b>2</b> or <b>2#</b>
Dial by nickname	Say the nickname for the person. You can also specify a destination.  <b>Note</b> For help with nicknames, see the "Copying a Corporate Directory Entry Into Your Personal Address Book" section on page 4-6.	<ul style="list-style-type: none"> <li>• "Call Boss"</li> <li>• "Get me Phil on his mobile phone"</li> <li>• "Dial courier"</li> <li>• "Business office"</li> </ul>	

Table 2-2 Directory Dialing Commands (continued)

What You Want Personal Assistant to Do	What You Say	What Your Spoken Command Sounds Like	Touch-Tone
Send a page	<p>Say the person's first and last name and specify pager.</p> <p> <b>Note</b> See the "Using Personal Assistant to Send and Receive Email-Based Paging Messages" section on page 2-8 for more details about email-based paging.</p>	<ul style="list-style-type: none"> <li>• "Page George Knightly"</li> <li>• "Harriet Smith on her pager"</li> </ul>	
Pause or hold			Press <b>Hold</b> on your telephone
Resume			Press <b>Hold</b> or <b>Resume</b> on your telephone
Interrupt the current task	"Cancel"		
Exit voice mail	"Good bye"		

### Tips

- If Personal Assistant finds more than one match for a party you requested, it asks you to choose one based on either the extension number or available voice recordings. For example, "To select *Jane Fairfax*, press or say one; to select extension 4484, press or say two." If you need Personal Assistant to repeat these options, say "help."
- Say "Help" at any point to get instructions from your Personal Assistant.
- Say "Cancel" at any point during the dialog to interrupt a task.

**Related Topics**

- Accessing Personal Assistant over Your Phone, page 2-1
- Using Personal Assistant Main Menu Options, page 2-2
- Using Personal Assistant to Send and Receive Email-Based Paging Messages, page 2-8
- Using Personal Assistant to Set Up Conferences, page 2-10
- Using Introductory Phrases with Dialing and Conferencing Commands, page 2-13
- Browsing Your Voice Mail with Personal Assistant, page 2-14

## Using Personal Assistant to Send and Receive Email-Based Paging Messages

The following sections describe how to use Personal Assistant to send and receive email-based paging messages:

- Sending an Email-Based Page, page 2-8
- Receiving an Email-Based Page, page 2-9

### Sending an Email-Based Page

You can tell Personal Assistant to send an email-based page to anyone who has an email-based paging address in the corporate directory. For example, if you want to page your colleague, Anne Weston, call Personal Assistant and say, “Page Anne Weston.” If Anne has an email-based paging address, Personal Assistant dispatches an email message to Anne with the date and time of your page, your name, and your contact number.

If your paging attempt is successful, Personal Assistant responds by saying, “Page sent.” If the party you want to page does not have an email-based paging address, or if your paging attempt is otherwise unsuccessful, Personal Assistant says, “I do not have that number” or “I was unable to send that page.”

**Note**

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You cannot send an email-based page to parties in your personal address book using Personal Assistant.

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**Related Topics**

- Accessing Personal Assistant over Your Phone, page 2-1
- Using Personal Assistant Main Menu Options, page 2-2
- Using Speech-enabled Directory Dialing, page 2-4
- Receiving an Email-Based Page, page 2-9
- Using Introductory Phrases with Dialing and Conferencing Commands, page 2-13

## Receiving an Email-Based Page

If you have a corporate email-based paging address, your colleagues can send you email-based paging messages through Personal Assistant. Email-paging messages contain the time and date of the page and the name and contact number of the person who dispatched the page.

If you have a personal email-based paging address external to your company, you can establish this address as a “destination” to which Personal Assistant can forward your incoming calls. Establish personal destinations and set up call forwarding rules by using the Cisco Personal Assistant User interface. For more information about the User interface, see the “Getting Started with Call Forwarding Rules” section on page 1-12.

**Note**

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Personal Assistant supports only email-based paging systems. You cannot send or receive numeric-based pages through Personal Assistant.

---

**Tips**

- An email-based paging address cannot be assigned to a rule as a solitary destination; it must reside in a destination group that contains at least one phone number. For more information, see the “Creating Destination Groups” section on page 3-4.
- If you create a destination group that contains a personal pager, Personal Assistant dispatches an email-based page to you at the same time that it calls the first phone number in the sequence of destinations. For more information, see the “Ordering Destinations in a Destination Group” section on page 3-7.

**Related Topics**

- Accessing Personal Assistant over Your Phone, page 2-1
- Using Personal Assistant Main Menu Options, page 2-2
- Using Speech-enabled Directory Dialing, page 2-4
- Sending an Email-Based Page, page 2-8
- Using Introductory Phrases with Dialing and Conferencing Commands, page 2-13

## Using Personal Assistant to Set Up Conferences

Personal Assistant can help you set up calls with more than one party. The following section describes how to use spoken commands to set up conference calls.

**Procedure**

---

**Step 1** Call Personal Assistant.

Personal Assistant greets you and asks what you want to do.

**Step 2** Say “Conference” or “Conference George Knightly.” You can also say, “Conference 555-2345” to include a party who is not listed in the corporate directory.

If you have already specified a name (or number), Personal Assistant confirms the name of the first participant. If you have not specified a name, Personal Assistant says, “Say the name of the person you want to conference in.”



**Step 3** Say the name of the party that you want to add to the conference list. For example, say “George Knightly.”

Personal Assistant says, “Adding George Knightly to the conference list from the corporate directory. Would you like to add more people to the conference?”

**Step 4** Say “yes” or “no.” If yes, repeat Step 3.

If you say “no,” Personal Assistant says, “Please wait while I set up the conference.”

If Personal Assistant reached the person successfully and the person accepted the conference invitation, Personal Assistant says, “Successfully conferenced in George Knightly,” for example. If Personal Assistant could not reach the person or the person declined the conference invitation, Personal Assistant says, “I’m sorry, I was unable to conference in George Knightly.”

Personal Assistant asks you to wait while inviting those on your list. The parties you invited can accept or reject the invitation by pressing 1 or 2 on their telephone key pads.

Once a conference is successfully established, Personal Assistant says, “Conferencing done.” At this point, the conference participants can speak directly to one another.

If all conference invitees decline or are unreachable, Personal Assistant says, “I’m sorry, I was unable to set up the conference.”

**Step 5** When you and other parties are ready to end the conference call, simply hang up. To use speech-enabled dialing or to set up another conference, redial Personal Assistant.

Table 2-3 shows a summary of conference options and commands:

Table 2-3 Conference Commands

What You Want Personal Assistant to Do	What You Say	What Your Spoken Command Sounds Like
Set up a conference	Tell Personal Assistant to set up a conference.	<ul style="list-style-type: none"> <li>“Conference”</li> </ul>
Set up a conference with a specific person	Say the first and last name of the person you want to conference in.	<ul style="list-style-type: none"> <li>“Conference George Knightly”</li> <li>“Harriet Smith”</li> </ul>
Add specific conference participants	Say the first and last name of the person you want to add to the conference.	<ul style="list-style-type: none"> <li>“Add George Knightly”</li> <li>“Harriet Smith”</li> </ul>

### Tips

- To cancel the addition of one person to the conference, say “Cancel” while Personal Assistant requests confirmation from the invited party. To cancel the entire conferencing attempt, say “Cancel” after Personal Assistant says, “Please wait while I set up the conference.”
- Say “Help” at any point to get instructions from your Personal Assistant.

### Related Topics

- Accessing Personal Assistant over Your Phone, page 2-1
- Using Personal Assistant Main Menu Options, page 2-2
- Using Speech-enabled Directory Dialing, page 2-4
- Using Personal Assistant to Send and Receive Email-Based Paging Messages, page 2-8
- Using Introductory Phrases with Dialing and Conferencing Commands, page 2-13
- Browsing Your Voice Mail with Personal Assistant, page 2-14

# Using Introductory Phrases with Dialing and Conferencing Commands

To place a call, simply state the person's first and last name, or state a phone number, and Personal Assistant understands that you want to place a call. Using introductory phrases, such as "Call" and "Dial," with dialing commands is optional. For example, "Jane Fairfax" and "Call Jane Fairfax" are synonymous commands to Personal Assistant.

If you want to use introductory phrases, however, you have a wide array to choose from. See Table 2-4 for introductory phrases that Personal Assistant recognizes.

**Table 2-4** *Optional Phrasing for Dialing and Conferencing Commands*

<b>Introductory Phrase</b>	<b>Examples</b>
Call	"Call Jane Fairfax."
Get me	"Get me Jane Fairfax."
Give me	"Give me Jane Fairfax on her pager."
Dial	"Dial George Knightly."
Connect me to/with	"Connect me with George Knightly."
Let me have	"Let me have George Knightly on his mobile phone."
I would like to dial	"I would like to dial Harriet Smith."
I want to place a call to	"I want to place a call to Harriet Smith."
I want to ring	"I want to ring Harriet Smith at work."
Transfer me to	"Transfer me to Frank Churchill."
Find me	"Find me Frank Churchill."
Could you call	"Could you call Frank Churchill?"
Extension	"Extension 1-2-3-4."

## **Related Topics**

- Accessing Personal Assistant over Your Phone, page 2-1
- Using Personal Assistant Main Menu Options, page 2-2

- Using Speech-enabled Directory Dialing, page 2-4
- Using Personal Assistant to Send and Receive Email-Based Paging Messages, page 2-8
- Using Personal Assistant to Set Up Conferences, page 2-10
- Browsing Your Voice Mail with Personal Assistant, page 2-14

## Browsing Your Voice Mail with Personal Assistant

Personal Assistant's voice-recognition feature lets you use spoken commands over the phone to navigate through your Cisco Unity voice mail system. In addition to spoken commands, Personal Assistant understands commands that you give through your touch-tone key pad. For a comprehensive list of commands that Personal Assistant recognizes, see the following tables:

- Table 2-1—Main Menu Options
- Table 2-2—Directory Dialing Commands
- Table 2-3—Conference Commands
- Table 2-4—Optional Phrasing for Dialing and Conferencing Commands
- Table 2-5—Voice Mail Main Menu Options
- Table 2-6—Task and Command Options
- Table 2-7—Outbound Message Options

You can begin using Personal Assistant to access your Cisco Unity voice mail immediately. Simply call Personal Assistant from any phone and say “voice mail” to get started. For more details, see the “How to Log in to the Voice Mail Main Menu” section on page 2-15.

**Note**

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Use of the voice mail feature through Personal Assistant assumes that your system administrator has already set up Personal Assistant to access your Cisco Unity voice mail system.

---

The following sections describe how to access and use your voice mail through Personal Assistant:

- How to Log in to the Voice Mail Main Menu, page 2-15
- Navigating the Main Menu, page 2-16
- Using Spoken Commands While Listening to Messages, page 2-21
- How to Send Voice Mail Messages, page 2-25

## How to Log in to the Voice Mail Main Menu

The following section describes how to log in to your voice mail from any phone.

### Procedure

---

**Step 1** Call Personal Assistant.

Personal Assistant says, “Welcome to Personal Assistant. What would you like to do?”

**Step 2** Say “Voice mail” or “Check messages.” The next steps vary depending on the phone from which you are calling:

- If you are calling from your desk phone, Personal Assistant asks for your password.
- If you are calling from a colleague’s desk phone (or an internal line other than your own), say “New mailbox” or “New extension.” Personal Assistant asks you to provide your mailbox extension number before you can enter your password.
- If you are calling from a home phone or other personal line, and if you have not established the line as a “personal destination,” Personal Assistant asks you to provide your mailbox extension number. Next, Personal Assistant asks you to enter your password.

**Step 3** You can enter your mailbox extension number (if required) and your password using the touch-tone key pad on your phone. Or you can say your extension and password aloud. For example, say “1-2-3-4.”



---

**Note** The voice mail password that you need to give Personal Assistant is the same numeric password that you have established with your Cisco Unity voice mail system.

---

Personal Assistant tells you the number of new and saved messages in your mailbox, and whether any of those messages are marked “urgent.” For example, “You have one new and three old messages. One message marked urgent.”

You have completed the login process and are now in the voice mail main menu. For a list of your main menu options, see the “Navigating the Main Menu” section on page 2-16.

---

### Tips

- To speed things up while you are entering your extension or password, press # to tell Personal Assistant that you have finished providing information. If you don't press #, Personal Assistant waits a moment after your last response before continuing.
- Say “Cancel” during the login process to exit the voice mail system and return to the Personal Assistant main menu.
- Say “Help” to hear your current options.

### Related Topics

- Navigating the Main Menu, page 2-16
- Using Spoken Commands While Listening to Messages, page 2-21
- How to Send Voice Mail Messages, page 2-25
- Adding Personal Destinations, page 3-2

## Navigating the Main Menu

After you log in to your voice mail “mail box” through Personal Assistant, you are placed in the voice mail main menu.

Table 2-5 describes your options from the main menu:

**Table 2-5 Voice Mail Main Menu**

<b>What You Want Personal Assistant to Do</b>	<b>Spoken Commands</b>	<b>Touch-Tone Commands</b>	<b>Notes on this Option</b>
List message headers	<ul style="list-style-type: none"> <li>• “List messages”</li> <li>• “Review messages”</li> </ul>	Press <b>1</b>	Use this option to hear header information for your messages. For example, “Message 1, received today at 10:45 a.m. from an outside caller, 25 seconds.”
Hear recorded messages	<ul style="list-style-type: none"> <li>• “Read messages”</li> <li>• “Play messages”</li> <li>• “Listen to messages”</li> </ul>	Press <b>2</b>	
Find a message by name, extension, or nickname	<ul style="list-style-type: none"> <li>• “Read messages from Frank Churchill” (by name)</li> <li>• “Play messages from 9-8-7-6” (by extension)</li> <li>• “List messages from Boss” (by nickname)</li> </ul>		Anywhere you can use a specific name or extension in a command, you can use a nickname that you have created to identify a user, such as “Boss.” For instructions about creating nicknames, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6.
Send a message	<ul style="list-style-type: none"> <li>• “Send message to John Smith”</li> <li>• “Compose message”</li> </ul>	Press <b>3</b>	Use this option to record and send a voice mail message.
Tally your messages	<ul style="list-style-type: none"> <li>• “Count messages”</li> <li>• “How many messages do I have?”</li> </ul>		Use this option to find out how many new, old, and urgent messages you have in your mail box.
Pause or hold			Press <b>Hold</b> on your telephone

Table 2-5 Voice Mail Main Menu (continued)

What You Want Personal Assistant to Do	Spoken Commands	Touch-Tone Commands	Notes on this Option
Resume			Press <b>Hold</b> or <b>Resume</b> on your telephone
Exit voice mail	<ul style="list-style-type: none"> <li>• “Cancel”</li> <li>• “Good bye”</li> </ul>		Use this command to exit voice mail and return to the Personal Assistant main menu.

### Tips

- Say “Cancel” at any point to interrupt an action and return to the previous menu.
- Say “Help” at any point to get information about your current options.
- Personal Assistant presents your voice mail messages to you in the following order: new urgent, new, old.
- Personal Assistant updates your message tally to reflect any new messages that you received while you were listening to your existing messages.

### Related Topics

- How to Log in to the Voice Mail Main Menu, page 2-15
- Using Read and List Modes, page 2-19
- Using Spoken Commands While Listening to Messages, page 2-21
- How to Send Voice Mail Messages, page 2-25



## Using Read and List Modes

There are two ways to listen to your voice mail messages from the main menu:

- read mode
- list mode

In read mode, Personal Assistant plays your recorded messages.

In list mode, Personal Assistant gives you a brief summary of each of your messages, including who left the message, on what date, the length of the recording, and whether the message is old, new or urgent. This summary information is also called “envelope” or “header” information.

Personal Assistant switches into read or list mode based on your spoken instructions. You can switch between these two modes as often as you want while navigating through your voice mail.

See the following sections for more information:

- Using Read Mode, page 2-19
- Using List mode, page 2-20

### Using Read Mode

In read mode, Personal Assistant simply plays back the message that a caller has recorded for you.

From the main menu, say any of the following keywords, in combination with other recognized voice mail commands, to trigger read mode:

- “Read”
- “Play”
- “Listen to”

For example, “Read messages” or “Play messages from George Knightly.”

From read mode you can:

- Hear another voice mail message by saying “next.”
- Switch to list mode by saying “List message.”

**Related Topics**

- Navigating the Main Menu, page 2-16
- Using List mode, page 2-20
- Using Spoken Commands While Listening to Messages, page 2-21

**Using List mode**

Use list mode to browse your messages quickly. In list mode, Personal Assistant provides detailed summary information for a message without playing the message itself. For example, “Message 1, received Tuesday at 9:15 a.m. from Anne Weston, 35 seconds.” Using list mode, you can decide which messages you want to hear and which you want to skip.

**Note**

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Personal Assistant can identify the person who left the message by name or extension if the caller is listed in the corporate directory. Otherwise, Personal Assistant identifies the caller as “an outside caller.”

---

From the main menu, say any of the following keywords, in combination with other recognized voice mail commands, to trigger list mode:

- “List”
- “Review”
- “Find”

For example, “List messages,” “Review messages from George Knightly,” or “Review messages from 1-2-3-4.”

From list mode you can:

- Hear another message header by saying “next.”
- Switch to read mode by saying, “Read message.”

**Related Topics**

- Navigating the Main Menu, page 2-16
- Using Read Mode, page 2-19
- Using Spoken Commands While Listening to Messages, page 2-21

## Using Spoken Commands While Listening to Messages

You have numerous command and task options while listening to your messages. Task options include skipping messages, replaying messages, responding to the sender of a message, deleting a message, and so on. Command options include touch-tone commands and spoken commands, with several phrasing options for each task. Table 2-6 lists task and command options.

**Table 2-6 Task and Command Options You Can Use While Listening to Messages**

<b>What You Want Personal Assistant to Do</b>	<b>Spoken Commands</b>	<b>Touch-Tone Commands</b>	<b>Notes on this Option</b>
List or read the first message	<ul style="list-style-type: none"> <li>• “Read first message”</li> <li>• “List first message”</li> </ul>		
List or read the next message	<ul style="list-style-type: none"> <li>• “Skip”</li> <li>• “List next message”</li> <li>• “Read next message”</li> </ul>	Press #	
List or read the last message	<ul style="list-style-type: none"> <li>• “Read last message”</li> <li>• “List last message”</li> <li>• “Skip to last message”</li> </ul>		
List or read the previous message	<ul style="list-style-type: none"> <li>• “Go back”</li> <li>• “List previous message”</li> <li>• “Read previous message”</li> </ul>	Press 9	
List or read a specific message by number	<ul style="list-style-type: none"> <li>• “Read first message”</li> <li>• “List second message”</li> <li>• “Go to message number three”</li> </ul>		
Replay a message or message header	<ul style="list-style-type: none"> <li>• “Replay message”</li> <li>• “Repeat message”</li> </ul>	Press 4	
Delete a message	<ul style="list-style-type: none"> <li>• “Delete message”</li> <li>• “Erase message”</li> </ul>	Press 7	Personal Assistant confirms your instruction, then says, “deleting message.” Say “cancel” within two seconds to stop the deletion.
Call the sender of a message	<ul style="list-style-type: none"> <li>• “Call back”</li> <li>• “Call him back”</li> <li>• “Call her back”</li> <li>• “Call this person back”</li> </ul>	Press 5	The call back feature works only with parties listed in the corporate directory.

Table 2-6 Task and Command Options You Can Use While Listening to Messages (continued)

What You Want Personal Assistant to Do	Spoken Commands	Touch-Tone Commands	Notes on this Option
Reply to the sender of a message	<ul style="list-style-type: none"> <li>• “Reply”</li> <li>• “Reply by voice mail”</li> <li>• “Reply to this message”</li> </ul>	Press <b>8</b>	You cannot use the reply feature with messages left by callers external to the corporate directory.
Forward the message to another extension	<ul style="list-style-type: none"> <li>• “Forward”</li> <li>• “Forward message”</li> <li>• “Forward to 5-6-7-8”</li> <li>• “Forward this message to George Knightly”</li> </ul>	Press <b>6</b>	Personal Assistant asks you to identify the recipient of the forwarded message and whether you want to include an introduction to the message.
Send a message	<ul style="list-style-type: none"> <li>• “Send message”</li> <li>• “Send message to Philip Elton” (by name)</li> <li>• “Compose message to “2-3-4-5” (by extension)</li> <li>• “Send message to Phil” (by nickname)</li> </ul>	Press <b>3</b>	For complete instructions, see the “How to Send Voice Mail Messages” section on page 2-25.
Delete all messages	<ul style="list-style-type: none"> <li>• “Delete all messages”</li> </ul>		Personal Assistant always asks you to verify. If you use this command after a “read” command for a specific caller, “delete all” applies to messages from only that caller.
Pause or hold			Press <b>Hold</b> on your telephone
Resume			Press <b>Hold</b> or <b>Resume</b> on your telephone

**Table 2-6 Task and Command Options You Can Use While Listening to Messages (continued)**

<b>What You Want Personal Assistant to Do</b>	<b>Spoken Commands</b>	<b>Touch-Tone Commands</b>	<b>Notes on this Option</b>
Interrupt the last task; exit the current menu	<ul style="list-style-type: none"> <li>• “Cancel”</li> <li>• “Quit”</li> </ul>		Saying “Cancel” during a task interrupts that task. Otherwise, say “Cancel” to exit the current menu and return to the main menu.
Exit voice mail	<ul style="list-style-type: none"> <li>• “Good bye”</li> <li>• “So long”</li> </ul>		Once you exit voice mail, you return to the Personal Assistant main menu.

**Tips**

- You can use nicknames in place of a full name or extension number. To establish nicknames for people, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6.
- Say “Help” during any point in the process, and Personal Assistant lists your options.
- Say “Cancel” to interrupt a task or return to the previous menu.

**Related Topics**

- How to Log in to the Voice Mail Main Menu, page 2-15
- Navigating the Main Menu, page 2-16
- Using Read and List Modes, page 2-19
- How to Send Voice Mail Messages, page 2-25

## How to Send Voice Mail Messages

The following procedure tells you how to record and send voice mail messages.

- 
- Step 1** Call Personal Assistant and log in to voice mail.  
Personal Assistant tells you the number of new and old messages in your mailbox.
- Step 2** Say “Send message.”  
Personal Assistant prompts you to say the first and last name, or extension, of the person to whom you want to send the message.
- Step 3** Say the name or extension of the message recipient.  
Personal Assistant might repeat the information and ask, “Is this correct?” Then Personal Assistant prompts you to record your message.
- Step 4** Speak after the beep and press # when you are done.  
After you record your message, Personal Assistant lists your options, as described in Table 2-7.

**Table 2-7** *Outbound Message Options*

<b>What You Want Personal Assistant to Do</b>	<b>Spoken Commands</b>	<b>Touch-Tone Command</b>
Send the message	<ul style="list-style-type: none"> <li>• “Send”</li> <li>• “Send message”</li> <li>• “Send it”</li> <li>• “One”</li> </ul>	Press <b>1</b>
Listen to your recording	<ul style="list-style-type: none"> <li>• “Review”</li> <li>• “Review message”</li> <li>• “Review it”</li> <li>• “Two”</li> </ul>	Press <b>2</b>

**Table 2-7 Outbound Message Options (continued)**

<b>What You Want Personal Assistant to Do</b>	<b>Spoken Commands</b>	<b>Touch-Tone Command</b>
Erase and re-record	<ul style="list-style-type: none"> <li>• “Re-record”</li> <li>• “Re-record message”</li> <li>• “Re-record it”</li> <li>• “Three”</li> </ul>	Press <b>3</b>
Mark this message as urgent and send it	<ul style="list-style-type: none"> <li>• “Send urgent”</li> <li>• “Send urgent message”</li> <li>• “Four”</li> </ul>	Press <b>4</b>
Cancel this message	<ul style="list-style-type: none"> <li>• “Cancel”</li> </ul>	Press <b>0</b>

**Step 5** If you are satisfied with your recording, say “Send.” See Table 2-7 for wording options.

Personal Assistant says, “Sending message.” You can say “cancel” immediately to stop the message from being sent.

After each of your instructions, Personal Assistant confirms your request, confirms the completion of the task, or asks for more information. If you get stuck, Personal Assistant gives you helpful suggestions. Once a task is completed, Personal Assistant asks, “What do you want to do next?”

### Tips

- Say “Help” at any point in the process, and Personal Assistant lists your options.
- Say “Cancel” to interrupt a task or return to the previous menu.
- You can use nicknames in place of a full name or extension number. To establish nicknames for people, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6.



### Related Topics

- Using Personal Assistant to Set Up Conferences, page 2-10
- How to Log in to the Voice Mail Main Menu, page 2-15
- Navigating the Main Menu, page 2-16
- Using Spoken Commands While Listening to Messages, page 2-21





## Setting Up Destinations for Incoming Calls

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Destinations are phone numbers or email-based paging addresses to which Cisco Personal Assistant can deliver your incoming calls. While some destinations are assigned to you by your company, you can set up additional destinations. Setting up a destination means giving Personal Assistant information about it.

Use the following sections to help you set up destinations and destination groups:

- What Are Destinations?, page 3-1
- Adding Personal Destinations, page 3-2
- Editing Personal Destinations, page 3-3
- Creating Destination Groups, page 3-4

### What Are Destinations?

Destinations are phone numbers or email-based paging addresses where Personal Assistant can deliver your incoming calls. Destinations include the following *types*:

- voice—telephone, mobile phone, IP phone, or voice mail system
- pager—An email-based paging system

Your destinations are set up in two different ways—by you and by your company:

- Your company destinations are assigned to you. These might include your desk phone number (such as, “ext.1234”), your voice mail number, your office email-based paging address (such as “ewoodhouse@pager.xyz.com”), or your company mobile phone.
- Your personal destinations are set up by you. These might include your personal mobile phone number, your home phone number, and numbers where you can be reached during a business trip.

Personal Assistant already knows about your company destinations; company destinations are assigned to you and stored in the “corporate directory.” However, you need to set up personal destinations. For more information about this procedure, see the “Adding Personal Destinations” section on page 3-2.

## Adding Personal Destinations

Use this procedure to establish a new, non-company destination. (Personal Assistant already knows about your company destinations, such as your desk phone.)

A destination is a phone number or email-based paging address to which Personal Assistant can forward your incoming calls.

### Procedure

- 
- Step 1** From the main menu, choose **Destinations > Destinations**.  
Personal Assistant opens the Destinations page.
- Step 2** Use the Type drop-down arrow to choose **pager** or **voice**.
- Step 3** Fill in the Destination Name field, then enter a phone number or email-based paging address in the next field, as shown in Figure 3-1.


**Figure 3-1**

Type	Destination Name	Number or Email-based Paging Address	
voice	Line 1 at Hartfield	5557755	Save

- Step 4** Click **Save**.

Personal Assistant creates the new destination and adds it to the List of Destinations, as shown in Figure 3-2.

**Figure 3-2**

Type	Name	Number or Email-based Paging Address	Delete
pager	Work Pager	ewoodhouse@xyz	
voice	Home Phone	555 1234	
voice	Voicemail	Voicemail	
voice	Work Phone	853 1180	
voice	Mobile Phone	555 8765	
voice	Line 1 at Hartfield	555 7755	

55627

### Tips

- An email-based paging address cannot be assigned to a rule as an individual destination; it must reside in a destination group that contains at least one phone number.
- Some destination names, such as “Work Phone,” “Mobile Phone” and “Home Phone,” are reserved for use by your company. Personal Assistant prompts you to choose a new name if you try to use a reserved name. A quick solution is to add “my” to the name of personal destinations.

### Related Topics

- What Are Destinations?, page 3-1
- Editing Personal Destinations, page 3-3
- Creating Destination Groups, page 3-4
- Creating a New Rule-Set, page 6-3

## Editing Personal Destinations

Use this procedure to change a destination. Edit a personal destination if your phone number changes or if you want to rename a destination.

You cannot edit destinations that your company has assigned to you.

### Procedure

---

- Step 1** From the main menu, choose **Destinations > Destinations**.  
Personal Assistant opens the Destinations page.
- Step 2** In the List of Destinations, click on the name, number or address of the destination that you want to edit.
- Step 3** Personal Assistant displays the information for this destination in the fields near the top of the page.
- Step 4** Change the information in the fields and click **Save**.  
Personal Assistant adds the modified entry to the List of Destinations.
- 

### Tips

To rename a destination, delete the original and recreate it with a new name.

### Related Topics

- What Are Destinations?, page 3-1
- Adding Personal Destinations, page 3-2
- Creating Destination Groups, page 3-4
- Creating a New Rule-Set, page 6-3

## Creating Destination Groups

Destination groups are multiple destinations arranged in a series and stored under a single group name.



### Note

With the exception of an email-based pager destination, you can determine the order in which Personal Assistant calls each destination in a group. For more information, see “Ordering Destinations in a Destination Group” section on page 3-7.

---

These sections can help you create destination groups:

- What Are Destination Groups?, page 3-5
- How Are Calls Processed By Destination Groups?, page 3-5
- Ordering Destinations in a Destination Group, page 3-7
- Adding a New Destination Group, page 3-7
- Assigning Destinations to a Destination Group, page 3-9
- Copying a Destination Group, page 3-11

## What Are Destination Groups?

Destination groups are multiple destinations (phone numbers or email-based paging addresses) arranged in a series and stored under a single group name.

Create a destination group when you want one call forwarded to a series of destinations. Take this example: You need a rule that tells Personal Assistant: “When George Knightly calls, try calling me at my desk phone. If I don’t answer, try me on my mobile phone, then try me on my home phone.” You create a destination group called “A,” for example, that contains your desk, mobile, and home phone numbers. Then, you create a rule that tells Personal Assistant: “When George Knightly calls, send his call to destination group ‘A.’”

See the “How Are Calls Processed By Destination Groups?” section on page 3-5.

## How Are Calls Processed By Destination Groups?

When a call gets sent to a destination group, Personal Assistant tries to forward the call to each destination in the group until you answer the phone, until your caller hangs up, or until the last destination in the group is reached. When Personal Assistant runs out of destinations, the call is forwarded to your default phone, which is typically your desk phone.

Personal Assistant asks the caller to hold while trying each number in your destination group.

Personal Assistant uses automatic call screening with destination groups to distinguish between a person answering and a machine answering; this feature ensures that answering machines and voice mail systems cannot prevent Personal Assistant from rolling a call that you do not answer to the next destination in the destination group.

The call screening feature places the caller on hold while Personal Assistant identifies the caller for you and prompts you to accept or forward the call. Personal Assistant only considers a call “connected” when a person picks up and presses an option key on his or her telephone key pad.

**Note**

---

A destination group must contain at least one phone number. If a destination group also contains a pager, Personal Assistant dispatches a pager message at the same time that it calls the first phone number in the group.

---

**Tips**

- Remember that callers are placed on hold while Personal Assistant tries to reach you at each destination in your destination group; the caller might hang up before the Personal Assistant can try all of the destinations in your group if your group is too big.
- To change the length of time that Personal Assistant waits for the phone to ring at each destination in a destination group, see the “Setting the Call Pick-Up Time-Out Feature” section on page 7-9.

**Related Topics**

- Ordering Destinations in a Destination Group, page 3-7
- Adding a New Destination Group, page 3-7
- Assigning Destinations to a Destination Group, page 3-9
- Copying a Destination Group, page 3-11
- Using the Call Screening Feature, page 6-19



## Ordering Destinations in a Destination Group

The sequence in which Personal Assistant dials each destination in a destination group mimics the sequence in which you added each destination to the group. For example, if you add destinations A, B, and C to a destination group in the order of C, A, and B, Personal Assistant calls destination C first, then destination A, then destination B.

To change the order in which Personal Assistant calls destinations in a group, you need to delete and re-add destinations to the group in the sequence that you want Personal Assistant to follow.

The only exception is an email-based pager; if a destination group contains a pager, Personal Assistant dispatches an email-based paging message at the same time that it calls the first phone number in the sequence.

### Related Topics

- What Are Destination Groups?, page 3-5
- Adding a New Destination Group, page 3-7
- Assigning Destinations to a Destination Group, page 3-9
- Copying a Destination Group, page 3-11

## Adding a New Destination Group

Use this procedure to create a new destination group.

### Procedure

- 
- Step 1** Open the Destination Groups page by doing one of the following:
- From the main menu, choose **Destinations > Destination Groups**.
  - Click the **Destination Groups** link near the bottom of the Destinations page.
- Personal Assistant displays the Destinations Groups page.
- Step 2** Enter a name for the new group in the Destinations Group Name field, as shown in Figure 3-3. If a name is already showing in the field, you can overwrite it.

**Figure 3-3**

A screenshot of a web interface showing a text input field labeled "Destination Group Name" containing the text "Personal". To the right of the input field is a grey button labeled "Add". The entire area is highlighted in yellow. On the right edge, there is a vertical label "55528".

**Step 3** Click the **Add** button.

Personal Assistant creates the destination group and adds it to the List of Destination Groups, as shown in Figure 3-4.

**Figure 3-4**

A screenshot of a table with three rows. The first row is highlighted in yellow and contains "Personal", a "Select Destinations" button, and "Copy" and "Delete" icons. The second and third rows are highlighted in light green and contain "Hartfield Offices" and "London Trip" respectively, each with "Copy" and "Delete" icons. On the right edge, there is a vertical label "55903".

Group Name		Copy	Delete
Personal	Select Destinations		
Hartfield Offices			
London Trip			

You can assign destinations to the new destination group now or later.

### Tips

Destination groups can share destinations. You can include your mobile phone in your destination groups “Personal,” “Weekends,” and “London Trip,” for example.

### Related Topics

- What Are Destination Groups?, page 3-5
- Ordering Destinations in a Destination Group, page 3-7
- Assigning Destinations to a Destination Group, page 3-9
- Copying a Destination Group, page 3-11

## Assigning Destinations to a Destination Group

Use this procedure to assign one or more destinations to a new or existing destination group.

### Before You Begin

If you want to add a new destination, such as a personal mobile phone, to an existing destination group, establish the mobile phone as a destination, then follow this procedure. See the “Adding Personal Destinations” section on page 3-2 for more information.

### Procedure

- Step 1** Open the Destination Groups page by doing one of the following:
- From the main menu, choose **Destinations > Destination Groups**.
  - Click the **Destination Groups** link near the bottom of the Destinations page.
- Personal Assistant displays the Destination Groups page.
- Step 2** Click the **Select Destinations** button to the right of the destination group that you want to assign a destination to, as shown in Figure 3-5.

**Figure 3-5**

Group Name		Copy	Delete
[-] Personal	Select Destinations		
[+] Hartfield Offices			
[+] London Trip			

559003



If the Select Destinations button does not appear, click the **plus or minus** icon to open it.

Personal Assistant opens the Destinations window, as shown in Figure 3-6.

**Figure 3-6**

Type	Name	Number or Email-based Paging Address	Select
pager	Work Pager	ewoodhouse@xyz	<input type="checkbox"/>
voice	Home Phone	555 1234	<input type="checkbox"/>
voice	Voicemail	Voicemail	<input checked="" type="checkbox"/>
voice	Work Phone	853 1180	<input type="checkbox"/>
voice	Mobile Phone	555 8765	<input checked="" type="checkbox"/>

555830

**Step 3** In the Destinations window, select the destinations that you want to include in the group by checking the **Select** check box at the end of the row. Be sure to select destinations in the order that you want Personal Assistant to follow when it forwards your incoming calls. For details, see the “Ordering Destinations in a Destination Group” section on page 3-7.



The Destinations window displays all the destinations that your Personal Assistant knows about. If the destination you want to use is not displayed, you need to add it. For instructions, see the “Adding Personal Destinations” section on page 3-2.

**Step 4** Click the **Add Selected** button.

**Step 5** If necessary, close or minimize the Destinations page to return to the Destination Groups page.

Personal Assistant adds the new destinations to the List of Destination Groups, as shown in Figure 3-7.

**Figure 3-7**

Type	Name	Number or Email-based Paging Address	Delete
voice	Home Phone	555 1234	
voice	Mobile Phone	555 8765	

555831

### Tips

- Destination groups must contain at least one phone number.
- The sequence in which Personal Assistant dials each destination in a destination group mimics the sequence in which you added each destination to the group. The only exception is a pager, which Personal Assistant calls at the same time that it calls the first phone number in the group.
- If you cannot find a destination group you want in the List of Destination Groups, you can create it from the Destination Groups page. Enter the name for the new destination in the Name field near the top of the page and click **Add**.

### Related Topics

- What Are Destinations?, page 3-1
- Adding Personal Destinations, page 3-2
- Creating Destination Groups, page 3-4
- Copying a Destination Group, page 3-11

## Copying a Destination Group

Use this procedure to create a copy of an existing destination group. The copy includes destination information contained within the original group.

You might copy a destination group to create two distinct groups with different names but similar contents (phone numbers and email-based paging addresses). In this case, copy the original destination group, then add and delete contents from the copied group.

### Procedure

---



- Step 1** In the Destination Groups page, click the **copy icon** that corresponds to the destination group that you want to copy.
- Step 2** Enter the name of the new destination group in the pop-up field.

**Step 3** Click **OK**.

Personal Assistant adds the new destination group to the List of Destination Groups.

You can add or remove personal destinations from the new destination group now or later.

---

**Tips**

If you want to delete a destination group, click the **delete icon** to the right of the group. To remove an individual destination from a destination group, click the **plus or minus** icon, if necessary, to open the group, then click the **delete icon**.

**Related Topics**

- What Are Destinations?, page 3-1
- Adding Personal Destinations, page 3-2
- Creating Destination Groups, page 3-4
- Assigning Destinations to a Destination Group, page 3-9



## Setting Up Your Personal Address Book

---

Your personal address book is a place to store contact information about the people who are *not* included in your corporate directory, such as clients, suppliers, friends, and family members.

These sections will help you set up and use your personal address book:

- Why Do You Need a Personal Address Book?, page 4-1
- Using Your Personal Address Book, page 4-2

### Why Do You Need a Personal Address Book?

You need a personal address book to supplement the information in the corporate directory.

The corporate directory is internal to your company and maintained by your company's system administrators, whereas your personal address book is set up and maintained by you.

Use the personal address book to store names and numbers of people outside of the company, including customers, suppliers, corporate partners, service providers, family members and friends. Cisco Personal Assistant uses information from your address book to forward your incoming calls and to help you place out-going calls. Personal Assistant also uses your personal address book to identify the people who call you.

**Note**

---

The personal address book is designed to supplement the corporate directory; however, use of the personal address book is *not* required. You can set up call forwarding and screening rules using only the corporate directory.

---

See the “Using Your Personal Address Book” section on page 4-2 for detailed instructions.

## Using Your Personal Address Book

These sections will help you set up and use the personal address book:

- Adding an Address Book Entry, page 4-2
- Editing an Address Book Entry, page 4-5
- Copying a Corporate Directory Entry Into Your Personal Address Book, page 4-6

## Adding an Address Book Entry

Use this procedure to add a new entry to your personal address book.

### Procedure

---

- Step 1** Open the address book by doing one of the following:
- From the main menu, choose **Callers > Address Book**.
  - From the Caller Groups page, click the **Add New Callers** link at the bottom of the page.

Personal Assistant displays the Address Book page, as shown in Figure 4-1.



Figure 4-1

Details	First Name	Last Name	Delete
	Bates &	Bates	
	Philip	Elton	
	George	Knightly	
	Anne	Weston	
	John	Smith	
	Mr.	Woodhouse	

55517

**Step 2** Click the **Add Caller** button.

Personal Assistant opens the Add New Caller window, as shown in Figure 4-2.

Figure 4-2

Caller Information	
First Name*	<input type="text" value="Jane"/>
Last Name*	<input type="text" value="Fairfax"/>
Email	<input type="text" value="jfairfax@wxy.com"/>
Nickname	<input type="text"/>
Work Phone	<input type="text" value="789-555-3080"/>
Home Phone	<input type="text"/>
Mobile Phone	<input type="text" value="789-555-6006"/>
* required item	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

55901

**Step 3** Fill in the personal information fields and click **Save**.

You must enter information in both the First Name and Last Name fields. The remaining fields, including the Nickname field, are optional.

The caller is added to the address book in the List of Callers, as shown in Figure 4-3.

Figure 4-3

Details	First Name	Last Name	Delete
	Bates &	Bates	
	Philip	Elton	
	Jane	Fairfax	
	George	Knightly	
	Anne	Weston	
	John	Smith	
	Mr.	Woodhouse	

55518

In addition to creating new entries in your personal address book, you can copy caller information from the corporate directory into your address book. For information about why you might want to do this, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6

### Tips

- To change an address book entry, click on any portion of the caller’s name to go directly to the Update Caller Information window. After you make your changes, click **Save**.
- You can choose any name for address book entries, but you must fill in both the first and last name fields.
- Personal Assistant recognizes phone numbers whether or not you enter them using dashes, parentheses, or spaces.

### Related Topics

- Why Do You Need a Personal Address Book?, page 4-1
- Editing an Address Book Entry, page 4-5
- Copying a Corporate Directory Entry Into Your Personal Address Book, page 4-6
- How to Use the Dial Rule Tester, page 8-3

## Editing an Address Book Entry

Use this procedure to update information on an existing entry in your personal address book.

### Procedure

---

- Step 1** From the main menu, choose **Callers>Address Book**.  
Personal Assistant opens the Address Book page.
- Step 2** Click on the first name or last name of the caller whose information you want to change.  
Personal Assistant opens the Update Caller Information window.
- Step 3** Change the caller information as required. For example, you might want to change a person's name or number or assign a nickname.
- Step 4** Click **Save**.  
Personal Assistant returns to the Address Book page and the address book entry reflects the changes you made to the caller information.
- 

### Tips

To delete an address book entry, click the **delete icon** to right of the caller's name in the Address Book page.



### Related Topics

- Why Do You Need a Personal Address Book?, page 4-1
- Adding an Address Book Entry, page 4-2
- Copying a Corporate Directory Entry Into Your Personal Address Book, page 4-6
- How to Use the Dial Rule Tester, page 8-3

## Copying a Corporate Directory Entry Into Your Personal Address Book

You can copy caller information from the corporate directory into your personal address book. There are several advantages to doing this:

- **Nicknames**—You can dial your colleagues by nickname if you establish a nickname in the personal address book and use the nickname instead of the person’s real name for speech-enabled dialing. Use of a nickname can improve the accuracy of speech-enabled dialing. Consider creating and using nicknames for those people in the corporate directory to whom you regularly place calls or whose names you find difficult to pronounce.
- **Name Dialing Preference**—You can search a smaller pool of names and improve the accuracy of speech-enabled dialing by setting the Name Dialing Preference. This feature tells Personal Assistant to search only your personal address book, and not the corporate directory, when searching for matches to speech-enabled dialing commands. To use this feature, copy often-called corporate directory entries into your personal address book, then set the Name Dialing Preference. For instructions, see the “Setting the Name Dialing Preference” section on page 7-7.
- **External numbers**—Another reason to copy a corporate entry into your personal address book is to add external phone numbers for your colleagues. If you regularly call a co-worker on his personal mobile phone, for example, you can copy his corporate directory information into your personal address book, then add his mobile phone to his list of numbers and use speech-enabled dialing to reach him.

Use the following procedure to copy a corporate entry into your personal address book.

### Procedure

---

**Step 1** From the Address Book page, click the **Copy Callers** button.

Personal Assistant opens the Caller Search window.

**Step 2** Fill in the fields.

Personal Assistant allows you to search by partial name, as shown in Figure 4-4. Wildcards (\*) are implicit and do not need to be entered.

**Figure 4-4**

Caller Search

First Name:

Last Name:

**Step 3** Click **Search**.

Personal Assistant displays a list of callers based on the information you entered, as shown in Figure 4-5.

**Figure 4-5**

Details	First Name	Last Name	User ID	Select
	John	Smith	jsmith	<input type="checkbox"/>
	Harriet	Smith	hsmith	<input checked="" type="checkbox"/>

**Step 4** Select the caller or callers that you want to copy by checking the **Select** check box or boxes.**Step 5** Click the **Add Selected** button.**Figure 4-6**

Details	First Name	Last Name	Delete
	Bates &	Bates	
	Philip	Elton	
	George	Knightly	
	Anne	Weston	
	John	Smith	
	Mr.	Woodhouse	
	Harriet	Smith	

Personal Assistant adds the copied callers to the list of callers in the Address Book page.

**Tips**

You can search by partial name, but you cannot leave the search fields entirely blank when searching the corporate directory. Wildcards (\*) are implicit and do not need to be entered.

**Related Topics**

- Using Speech-enabled Directory Dialing, page 2-4
- Why Do You Need a Personal Address Book?, page 4-1
- Adding an Address Book Entry, page 4-2
- Editing an Address Book Entry, page 4-5
- Setting the Name Dialing Preference, page 7-7
- How to Use the Dial Rule Tester, page 8-3



## Setting Up Caller Groups to Apply Rules to Multiple Callers

---

Caller groups contain multiple entries from your address book and corporate directory.

Caller groups allow you to apply one rule to multiple callers without requiring you to recreate the rule multiple times.

The following sections can help you set up caller groups with Cisco Personal Assistant:

- How Can You Use Caller Groups?, page 5-1
- Adding a New Caller Group, page 5-2
- Adding Callers to Caller Groups, page 5-3
- Copying Caller Groups, page 5-5

## How Can You Use Caller Groups?

Grouping callers can help you organize callers by priority, rather than simply dividing them between the personal address book and corporate directory.

For example, assume that you want calls from your top-priority clients or co-workers to reach you on your mobile phone when you are in meetings, but you want all other incoming calls to go to your voice mail when you are in meetings. Create a caller group that contains your top-priority clients and co-workers (a blend of personal address book and corporate directory entries) and label the

group “Top Priority,” for example. Then build a rule telling your Personal Assistant: “If someone from the group called ‘Top Priority’ calls when I am in a meeting, send the call to my mobile phone.”

You can add and remove the members of a caller group any time.

### Related Topics

- Adding a New Caller Group, page 5-2
- Adding Callers to Caller Groups, page 5-3
- Copying Caller Groups, page 5-5
- Building Rules, page 6-5

## Adding a New Caller Group

Use this procedure to create a new caller group.

### Procedure

- 
- Step 1** From the main menu, choose **Callers > Caller Groups**.  
Personal Assistant opens the Caller Groups page.
- Step 2** In the Caller Group Name field, enter a name for the new group, as shown in Figure 5-1. If a name is already showing in the Name field, you can overwrite it.

**Figure 5-1**

Caller Group Name

A List

52862

- Step 3** Click **Add**.  
Personal Assistant creates the caller group and adds it to the list of existing groups.  
You can add callers to the new caller group now or later.
-



### Tips

Because caller groups are designed to help you organize callers according to priority, choose caller group names that reflect the priority level of one group of callers relative to another group of callers. For example, Group A, Group B, and Group C—or “Friends,” “Top Customers,” and “Colleagues.”

### Related Topics

- Using Your Personal Address Book, page 4-2
- How Can You Use Caller Groups?, page 5-1
- Adding Callers to Caller Groups, page 5-3
- Copying Caller Groups, page 5-5

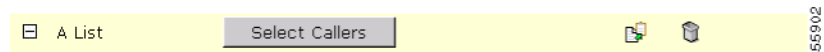
## Adding Callers to Caller Groups

Use this procedure to add callers to a new or existing caller group.

### Procedure

- Step 1** In the Caller Group page, click the **Select Callers** button to the right of the caller group to which you want to assign callers. See Figure 5-2.

**Figure 5-2**



If the Select Callers button does not appear, click the **plus or minus** icon to open it.

Personal Assistant opens the Caller Search window, as shown in Figure 5-3.

Figure 5-3

Caller Search

Look in: Corporate Directory

First Name: George

Last Name: Knightly

User ID\*\*:

Search

**Step 2** In the Caller Search window, choose **Corporate Directory** or **Personal Address Book**.

**Step 3** Fill in the remaining fields.

Personal Assistant allows you to search by partial name. When searching the corporate directory, however, you cannot leave both fields entirely blank. Wildcards (\*) are implicit and do not need to be entered.

**Step 4** Click the **Search** button.

Personal Assistant displays a list of callers based on the information you entered, as shown in Figure 5-4.

Figure 5-4

Details	First Name	Last Name	Select
	George	Knightly	<input checked="" type="checkbox"/>

**Step 5** Select the callers whom you want to include in the caller group by checking the **Select** check box at the end of the row.

**Step 6** Click **Add Selected**.

Personal Assistant adds the callers to the caller group and returns to the Caller Groups page, as shown in Figure 5-5.

Figure 5-5

A List

Select Callers

Callers

George Knightly\*

Delete



---

**Note** The asterisk in Figure 5-5 denotes that caller information for this particular caller comes from the personal address book rather than from the corporate directory.

---

### Related Topics

- Using Your Personal Address Book, page 4-2
- How Can You Use Caller Groups?, page 5-1
- Adding a New Caller Group, page 5-2
- Copying Caller Groups, page 5-5

## Copying Caller Groups

Use this procedure to create a copy of an existing caller group. The copy includes caller information contained within the original group.

### Procedure



---

**Step 1** In the Caller Groups page, click the **copy icon** that corresponds to the caller group you want to copy.

**Step 2** Enter the name of the new caller group in the pop-up field and click **OK**.

The pop-up field disappears and Personal Assistant adds the new caller group to the List of Caller Groups.

You can add or remove callers from the new caller group now or later.

---

**Tips**

- If you want to delete a caller group, click the **delete icon** to the right of the group. To remove an individual caller from a caller group, click the **plus or minus** icon, if necessary, to open the group, then click the **delete icon**.
- To rename a caller group, copy the group under a new name and delete the original group.

**Related Topics**

- Using Your Personal Address Book, page 4-2
- How Can You Use Caller Groups?, page 5-1
- Adding a New Caller Group, page 5-2
- Adding Callers to Caller Groups, page 5-3



## Setting Up Rules for Handling Incoming Calls

---

These sections introduce rules and rule-sets and provide instructions about how to use them:

- What Are Rules and Rule-Sets?, page 6-1
- Creating a New Rule-Set, page 6-3
- Building Rules, page 6-5
- Activating a Rule-Set, page 6-15
- Using the Call Screening Feature, page 6-19

## What Are Rules and Rule-Sets?

The following sections define rules and rule-sets:

- What is a Rule?, page 6-2
- What is a Rule-Set?, page 6-2
- What is the Difference Between a Rule and a Rule-Set?, page 6-3

## What is a Rule?

A rule for Cisco Personal Assistant is much like an instruction that you would give to a human personal assistant. Rules tell Personal Assistant to send some of your calls to certain numbers and other calls to different numbers based on the identity of the caller, the time of day, and your calendar.

You can change the characteristics of your rules as frequently and dramatically as you need to. For example, you can make a rule that sends all calls from Philip Elton to your mobile phone; then later change the rule to effectively send all calls *except* those from Philip Elton to your mobile phone.

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

### Related Topics

- What is a Rule-Set?, page 6-2
- What is the Difference Between a Rule and a Rule-Set?, page 6-3
- Creating a New Rule-Set, page 6-3
- Building Rules, page 6-5

## What is a Rule-Set?

A rule-set is a group of one or more rules that you can activate on certain days, according to your schedule. Personal Assistant requires that you create a rule-set before you can add rules to it.

When your incoming calls are processed through rules, Personal Assistant uses the first rule in a rule-set that matches the conditions of the incoming call and applies it. Therefore, the way you order your rules within a rule-set is important. In general, order rules from most specific to least specific.

### Related Topics

- What is a Rule?, page 6-2
- What is the Difference Between a Rule and a Rule-Set?, page 6-3

- Creating a New Rule-Set, page 6-3
- Activating a Rule-Set, page 6-15

## What is the Difference Between a Rule and a Rule-Set?

*Rule-sets* are ordered lists of rules. You can schedule a rule-set by days of the week or by date range.

A *rule* needs to be built inside of a rule-set; you cannot build a rule for your Personal Assistant unless you first create the rule-set to which you want the rule to belong.

When a rule-set contains more than one rule, Personal Assistant tests each rule in sequence to see if it matches the conditions of an incoming phone call. Personal Assistant applies the first matching rule to the call.

### Related Topics

- What is a Rule?, page 6-2
- What is a Rule-Set?, page 6-2
- Creating a New Rule-Set, page 6-3

## Creating a New Rule-Set

Use the following procedure to create a new rule-set.

### Procedure

---

- Step 1** From the main menu, choose **Rules > Rule-Sets**.  
Personal Assistant opens the Rule-Sets page.
- Step 2** In the Rule-Set Name field, enter a name for the new rule-set, as shown in Figure 6-1.





**Figure 6-1**

Rule-Set Name	Add Rule-Set
Work Week	Add Rule-Set

**Step 3** Click **Add Rule-Set**.

Personal Assistant creates the new rule-set and adds it to the List of Rule-Sets, as shown in Figure 6-2.

**Figure 6-2**

Rule-Set Name	Active Period	Delete
☒ Anne's	Inactive	
☒ HQ	Inactive	
☒ Weekend	Inactive	
☒ Work Week	Inactive	

**Step 4** You can add rules to the rule-set now or later. For instructions, see the “Building Rules” section on page 6-5.**Tips**

- To delete a rule-set, click the **delete icon** to the right of the rule-set. Active rule-sets cannot be deleted. To de-activate a rule-set, select “click to select” in place of the rule-set name in the Activate Rule-Sets page.
- The names you choose for your rule-sets can make it easier for you to activate them in the future. For example, a rule-set called “Work Week” might be activated Monday through Friday, whereas a rule-set called “London Trip” might be activated only during the calendar dates of that trip. See the “Activating a Rule-Set” section on page 6-15.

**Related Topics**

- What Are Rules and Rule-Sets?, page 6-1
- Building Rules, page 6-5
- Activating a Rule-Set, page 6-15
- Using the Call Screening Feature, page 6-19
- How to Use the Call Forwarding Rule Tester, page 8-1



# Building Rules

Use the following sections to help you build and use rules:

- Adding a New Rule, page 6-5
- Editing a Rule, page 6-13
- Changing the Order of Multiple Rules in a Rule-Set, page 6-14

## Adding a New Rule

Use this procedure to add a new rule. For help with understanding rules, see the “What Are Rules and Rule-Sets?” section on page 6-1.

### Before You Begin

Before adding a rule, you need to create a rule-set. For instructions, see the “Creating a New Rule-Set” section on page 6-3.

### Procedure

- Step 1** Choose **Rules > Rule-Sets** from the main menu.
- Personal Assistant opens the Rule-Sets page.
- From the Rule-Sets page, click the **Add Rule** button for the rule-set within which you want to build a rule.
- If the Add Rule button is hidden, click the **plus or minus** icon to open it.




**Figure 6-3**



Personal Assistant opens the Rule page.

- Step 2** In the Rule page, enter the information that you want Personal Assistant to use when forwarding your calls. At a minimum, you must choose a destination or destination group (a phone number or group of numbers to which Personal Assistant can forward your calls). Other fields on the Rule page are optional.
- See Table 6-1 for Rule page options.

Table 6-1 Rule Page Options

Rule Page Section	Required or Optional	How to Use this Section	Where to Get More Details
Caller Identity	Optional	Specify a caller, caller group, or caller's phone number that you want to include in your rule.	Specifying Caller Identity in a Rule, page 6-8
Time of Day	Optional	Specify hours of the day when you want your rule to apply to your calls.	Specifying Time of Day in a Rule, page 6-11
Meeting schedule	Optional, if available	Include your calendar or meeting schedule in a rule.	Specifying Calendar Status in a Rule, page 6-12   <b>Note</b> Your system administrator determines the availability of this feature
Destination	Required	Specify a destination or destination group where you want Personal Assistant to forward your calls. Use the call-screening field in this section to tell Personal Assistant whether or not to screen calls.	<ul style="list-style-type: none"> <li>• What Are Destinations?, page 3-1</li> <li>• What Are Destination Groups?, page 3-5</li> <li>• Using the Call Screening Feature, page 6-19</li> </ul>
Preview	Optional	View a text version of your rule before adding it to your rule-set.	Previewing a Rule, page 6-12

**Note**

Pager destinations do not appear in the Destinations drop-down menu because pagers cannot exist alone in a rule; a pager needs to share a destination group with at least one phone number.

**Step 3** In the Destination section of the Rule page, use the drop-down arrow to choose a destination or destination group.

**Step 4** Choose “screen the call” or “do not screen the call” from the drop-down menu, as shown in Figure 6-4.



**Note** Personal Assistant automatically screens calls that you send to a destination group. Therefore, you cannot choose to de-activate the call-screening feature on the rule page once you select a destination group for a rule.

**Figure 6-4**



**Step 5** To see your rule after choosing a destination, click the **Preview Now** button. Personal Assistant will show you a text version of your rule so far.

**Step 6** Click **Save** to add your rule to the rule-set. Or specify more criteria for your rule. You can add multiple rules to a rule-set.

### Tips



- In the Rule-Set page, click the **delete icon** to the right of the rule that you want to remove from a rule-set. Click on the **delete icon** that corresponds to a rule-set to delete the entire rule-set.
- Click the **up and down** arrows to rearrange the order of the rules in a rule-set. Because Personal Assistant uses the first rule that matches and applies it to an incoming call, the order of your rules within a rule-set is important. In general, order rules from most specific to least specific.
- To edit a rule, click on the rule text in the Rule-Set page.

- In the Rule page, you must specify a destination or destination group to which Personal Assistant can forward your calls. Other fields on the page are optional.
- Specify “voice mail” as a destination when you want calls to go straight to your voice mail system without ringing your desk-top phone.

### Related Topics

- Specifying Caller Identity in a Rule, page 6-8
- Specifying Time of Day in a Rule, page 6-11
- Specifying Calendar Status in a Rule, page 6-12
- Previewing a Rule, page 6-12
- Editing a Rule, page 6-13
- Using the Call Screening Feature, page 6-19
- How to Use the Call Forwarding Rule Tester, page 8-1

## Specifying Caller Identity in a Rule

Use the Caller Identity section of the Rule page to include individual callers, caller groups, or a caller’s phone number in a rule.

### Procedure


- 
- Step 1** Choose **Rules > Rule-Sets** from the main menu.  
Personal Assistant opens the Rule-Sets page.  
From the Rule-Sets page, click the **Add Rule** button for the rule-set within which you want to build a rule. See Figure 6-3.
-  If the Add Rule button is hidden, click the **plus or minus** icon to open it.
- Step 2** Find the **Caller Identity** section of the Rule page, as shown in Figure 6-5.

Figure 6-5

**Caller Identity:** Use this section to specify "caller ID" criteria for this rule.

If the caller is one of  or

\* caller is from Address Book

if the caller belongs to  or

\* caller group contains no callers

if the caller's  is  (phone number, such as 525\*)

55567

**Step 3** If you want to specify one or more individual callers (as opposed to caller groups) in your rule, perform the following steps:

- a. Choose “is one of” or “is not one of” from the first drop-down menu. Then click the **Select Callers** button.

Personal Assistant opens the Caller Search window, as shown in Figure 6-6.

Figure 6-6

**Caller Search**

Look in:

First Name:

Last Name:

User ID\* \*:

52840

- b. Choose a directory to search, enter a name or partial name, and click **Search**. Personal Assistant displays the results of your search.
- c. To select a caller from the list, check the **Select** check box to the right of the caller’s name. Click **Add Selected** and **Close**.

You can add more than one individual caller to a rule. To remove callers from a rule, select the caller’s name in the Rule page and click the **Remove Callers** button.

**Step 4** If you want to specify a caller group (as opposed to individual callers) in your rule, do the following:

- a. Choose “belongs to” or “does not belong to” from the drop-down menu.

- b. Choose a caller group from the next drop-down menu.
- c. Click **Save** to add your rule to the rule-set, or specify more criteria for your rule.

**Step 5** Additionally, you can specify a caller by phone number, as shown in Figure 6-7.



**Note** Enter the number that Personal Assistant associates with the caller (typically a work extension); this number is not necessarily the same number from which the person might place the incoming call.

**Figure 6-7**

if the caller's  is  (phone number, such as 525\*)

### Tips

- You can see a text version of a rule before you save it by clicking the **Preview Now** button at the bottom of the Rule page.
- Before you can use a caller group in a rule, you need to create the caller group. For more information, see Adding a New Caller Group, page 5-2.

### Related Topics

- Building Rules, page 6-5
- Specifying Time of Day in a Rule, page 6-11
- Specifying Calendar Status in a Rule, page 6-12
- Previewing a Rule, page 6-12
- Editing a Rule, page 6-13
- Using the Call Screening Feature, page 6-19

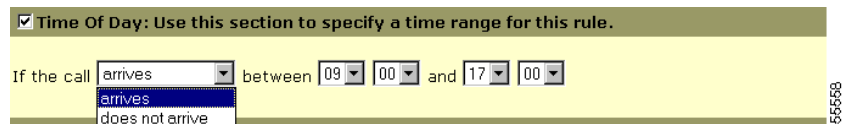
## Specifying Time of Day in a Rule

Use the Time of Day section of the Rule page to limit the hours when you want a rule applied to your incoming calls.

### Procedure

- Step 1** Find the **Time of Day** section of the Rule page, as shown in Figure 6-8.

**Figure 6-8**



- Step 2** Use the drop-down arrow to choose “arrives” or “does not arrive.”
- Step 3** Choose an hourly range from the drop-down menu.

### Tips

- The Personal Assistant uses a 24-hour clock, rather than a 12-hour clock; therefore, “17:00” is equivalent to 5:00 pm.
- If you use the Time of Day criteria in a rule, Personal Assistant needs to know your time zone. From the main menu, choose **Preferences > Settings** to view or change your time zone setting.

### Related Topics

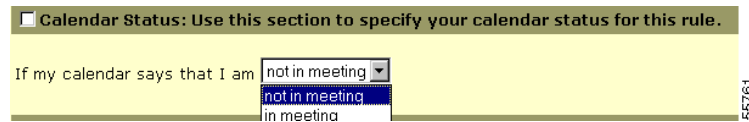
- Specifying Caller Identity in a Rule, page 6-8
- Specifying Calendar Status in a Rule, page 6-12
- Previewing a Rule, page 6-12
- Using the Call Screening Feature, page 6-19
- Changing the Time Zone, page 7-6

## Specifying Calendar Status in a Rule

Use this feature to specify your calendar status or meeting schedule in a rule. This feature works in tandem with your corporate calendar system. Your system administrator determines the availability of this feature.

Choose “in a meeting” or “not in a meeting” as shown in Figure 6-9.

**Figure 6-9**



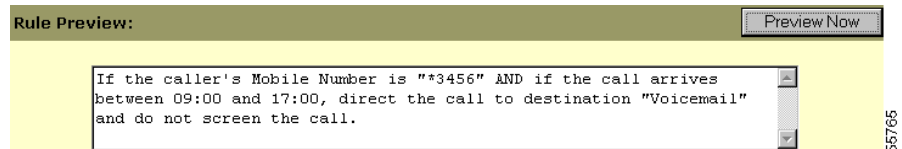
### Related Topics

- Building Rules, page 6-5
- Specifying Caller Identity in a Rule, page 6-8
- Specifying Time of Day in a Rule, page 6-11
- Previewing a Rule, page 6-12
- Using the Call Screening Feature, page 6-19

## Previewing a Rule

You can preview a text version of a rule while you are building the rule by clicking the **Preview Now** button on the Rule page. See Figure 6-10.

**Figure 6-10**





**Related Topics**

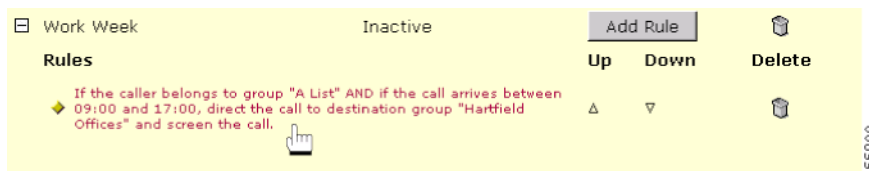
- Building Rules, page 6-5
- Specifying Caller Identity in a Rule, page 6-8
- Specifying Time of Day in a Rule, page 6-11
- Editing a Rule, page 6-13
- How to Use the Call Forwarding Rule Tester, page 8-1

## Editing a Rule

Use this procedure to change a rule that you have already created.

**Procedure**

- Step 1** From the Rule-Sets page, click on any part of the descriptive text for a rule, as shown in Figure 6-11. The rules are links that will take you to the Rule page.

**Figure 6-11**

Personal Assistant opens the Rule page for that particular rule.

- Step 2** In the Rule page, change the information as necessary.
- Step 3** Once you have completed the changes, click **Preview Now**. If you are satisfied with the changes you made to your rule, click **Save**.

Personal Assistant returns to the Rule-Sets page. The rule text reflects the changes you made to the rule.

- Step 4** When you have finished adding rules to and creating rule-sets, click the **Activate Rule-Sets** link to apply the rule-set to your incoming phone calls.
- 

#### Related Topics

- Creating a New Rule-Set, page 6-3
- Building Rules, page 6-5
- Previewing a Rule, page 6-12
- Changing the Order of Multiple Rules in a Rule-Set, page 6-14
- Activating a Rule-Set, page 6-15

## Changing the Order of Multiple Rules in a Rule-Set

If you add multiple rules to one rule-set, arrange your rules from most specific to least specific. Because Personal Assistant tries to match rules in a top-down order as they appear on the Rule-Sets page, this arrangement ensures that Personal Assistant matches calls to a specific rule before trying to match a call to a general rule.

Use the following procedure to change the order of multiple rules in a rule-set.

#### Procedure

---

- Step 1** Open the Rule-Sets page by choosing **Rules > Rule-Sets**.
- Step 2** Click the **up and down** arrows to rearrange the order of the rules, as shown in Figure 6-12.

*Figure 6-12*





### Tips

Click the **delete icon** to the right of the rule that you want to remove from a rule-set. You can click on the **delete icon** that corresponds to a rule-set to delete the entire rule-set.

### Related Topics

- Creating a New Rule-Set, page 6-3
- Adding a New Rule, page 6-5
- Editing a Rule, page 6-13
- Activating a Rule-Set, page 6-15

## Activating a Rule-Set

Activating a rule-set means to schedule it to take effect on certain days or dates. Activate a rule-set to tell Personal Assistant when to apply rules to your incoming phone calls.

You can activate a rule-set by days of the week or within a range of calendar dates. For example, you can tell your Personal Assistant to apply your “vacation” rule-set from March 1 to March 8 and your “London Trip” rule-set from March 8 to March 11. Once the trip is over, you can activate your “Work Week” rule-set on Monday through Friday, as usual.

Personal Assistant only allows one rule-set to be active at any given time. When one rule-set is active, other rule-sets are simultaneously de-activated for the same time period.

The following sections describe your options for activating a rule-set:

- Activating Rule-Sets By Days of the Week, page 6-15
- Activating Rule-Sets By Specific Dates, page 6-17

## Activating Rule-Sets By Days of the Week

Use this procedure to apply a rule-set to one or more days of the week. For example, every Tuesday, every weekday, every weekend, and so on.

## Procedure

- Step 1** Open the Activate Rule-Sets page by doing one of the following:
- In the Rule-Sets page, click the **Activate Rule-Sets** link at the bottom of the screen.
  - From the main menu, choose **Rules > Activate Rule-Sets**

Personal Assistant opens the Activate Rule-Sets page.

- Step 2** To activate a rule-set according to days of the week, click any of the drop-down menus for days of the week and select the rule-set that you want to activate, as shown in Figure 6-13.

You can select a rule-set for one or more particular days of the week, or you can select a rule-set for “Everyday,” which applies the rule-set to every day of the week.

**Figure 6-13**

Days of the week: Choose rule-sets to activate on specific days.

Day(s)	Rule-Set	Day(s)	Rule-Set
Monday	Work Week	Friday	Work Week
Tuesday	Work Week	Saturday	-Click to Select-
Wednesday	Work Week	Sunday	-Click to Select- vacation
Thursday	Work Week	Everyday	Weekend Work Week

- Step 3** Once you have selected the rule-set or sets that you want to activate by days of the week, click **Update**.
- Step 4** From the main menu, choose **Rules > Rule-Sets**. You can see the activation results under the “Active Period” section of the Rule-Sets page, as shown in Figure 6-14.

**Figure 6-14**

Rule-Set Name	Active Period	Delete
Weekend	Sat	
Work Week	Mon, Tue, Wed, Thu, Fri	<input type="button" value="Add Rule"/>

**Tips**

- You can turn off rule processing without changing your rule-set schedule. Choose **Preferences > Settings** from the main menu, then check the box called “Turn off Cisco PA.”
- To de-activate a rule-set without turning off rule processing, go back to the Activate Rule-Sets page and select “Click to Select” in place of rule-set names from the drop-down menus.

**Related Topics**

- Creating a New Rule-Set, page 6-3
- Specifying Time of Day in a Rule, page 6-11
- Activating Rule-Sets By Specific Dates, page 6-17
- How to Use the Call Forwarding Rule Tester, page 8-1

## Activating Rule-Sets By Specific Dates

Use this procedure to apply a rule-set during a range of calendar dates.

You can schedule up to three date ranges in advance. Because Personal Assistant uses the first date range that matches, order your rule-sets from most specific to least specific. Place your most general, or “default” rule-set last. This ordering ensures that all the date ranges can take affect. For example:

- “Vacation” rule-set, active June 5 to June 12
- “London Trip” rule-set, active June 17 - June 20
- “Work Week” rule-set, active June 1 - June 30

**Procedure**

- 
- Step 1** Open the Activate Rule-Sets page by doing one of the following:
- In the Rule-Sets page, click the **Activate Rule-Sets** link at the bottom of the screen
  - From the main menu, choose **Rules > Activate Rule-Sets**

Personal Assistant opens the Activate Rule-Sets page.

## Activating a Rule-Set

**Step 2** To activate a rule-set according to specific dates, choose a date range in the **From** and **To** drop-down menus.

**Step 3** In the Rule-Set column, choose a rule-set for each row you want to use, as shown Figure 6-15.



**Note** Rows that have “click to select” in place of a rule-set are not active. You can de-activate a rule-set by returning to the Activate Rule-Sets page and choosing “click to select” in place of the rule-set name. Click **Update** after any changes.

**Figure 6-15**

Date Range: Choose a date range and a corresponding rule-set.

	From	To	Rule-Set
<input checked="" type="checkbox"/>	Jun 7 2001	Jun 12 2001	vacation
<input checked="" type="checkbox"/>	Jun 20 2001	Jun 24 2001	London Trip
<input checked="" type="checkbox"/>	Jun 1 2001	Jul 31 2001	Work Week

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**Step 4** Click **Update**.

**Step 5** Choose **Rules > Rule-Sets** to see the activation results on the Rule-Sets page, as shown in Figure 6-16.

**Figure 6-16**

Rule-Set Name	Active Period	Delete
<input type="checkbox"/> Weekend	Inactive	
<input type="checkbox"/> Work Week	Jun 01 2001 - Jul 31 2001	
<input type="checkbox"/> vacation	Jun 07 2001 - Jun 12 2001	
<input type="checkbox"/> London Trip	Jun 20 2001 - Jun 24 2001	

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**Tips**

- You can turn off rule processing without changing your rule-set schedule. Choose **Preferences > Settings** from the main menu, then check the box called “Turn off Cisco PA.”
- To de-activate a rule-set without turning off rule processing, go back to the Activate Rule-Sets page and select “Click to Select” in place of rule-set names from the drop-down menus.

**Related Topics**

- Creating a New Rule-Set, page 6-3
- Specifying Time of Day in a Rule, page 6-11
- Activating Rule-Sets By Days of the Week, page 6-15
- Using the Call Screening Feature, page 6-19
- How to Use the Call Forwarding Rule Tester, page 8-1

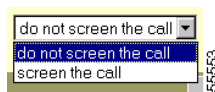
## Using the Call Screening Feature

Adding call screening to a rule lets you have options about how to handle screened calls before allowing those calls to connect.

Figure 6-17 shows the call screening drop-down menu in the Rule page.

Because the call screening feature is part of a rule, you need to follow the procedure for setting up a rule-set before you can add a rule with call screening. For instructions, see the “Creating a New Rule-Set” section on page 6-3 and the “Building Rules” section on page 6-5.

**Figure 6-17**



Note that call screening applies automatically to rules that specify destination groups.

For a description of what Personal Assistant says to you and your callers, see the “What Call Screening Sounds Like” section on page 6-20.

## What Call Screening Sounds Like

When you receive a call to which a call screening rule applies, Personal Assistant tells the caller to hold while it lets you decide if you want to take the call.

If the caller is included in your corporate directory, Personal Assistant recognizes the caller and identifies the caller by a name or phone number.

If the caller does not belong to the corporate directory, Personal Assistant does not recognize the caller and asks the caller to record his or her name after a prompt. Personal Assistant then plays the recorded name to identify the caller for you.

Next, Personal Assistant gives you the following options over the telephone:

- Press 1 to take the call
- Press 2 to forward the call to another number
- Press 3 to send the call to voice mail (if available)

Meanwhile, Personal Assistant tells your caller, “Please wait while locating.”

If you are not available to pick up a screened call, Personal Assistant sends the incoming call to your default destination, which typically is your desk phone and integrated voice mail system.





## Customizing Personal Assistant

---

You can customize your Cisco Personal Assistant through the Preferences menu. Use this menu to turn Personal Assistant on and off, change your time zone setting or password, narrow directory searches, and specify alternate names for yourself, among other options.

The following sections describe customizing options in the preferences menu:

- Setting Dial Rules, page 7-1
- Specifying Your Settings, page 7-3
- Changing Your Password, page 7-10

### Setting Dial Rules

The Dial Rules feature allows you to insert a prefix before a number, or strip a prefix from a number.

It is unlikely that you will need to configure your dial rules, as this feature is primarily handled by your system administrator. However, in unusual cases, you might want to configure dial rules to insert a special access code or long distance prefix in front of particular phone numbers.



**Note**

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The digits you enter in your personal address book generally dictate how your Personal Assistant dials outbound calls to parties external to the corporate directory. Because you can enter area codes,

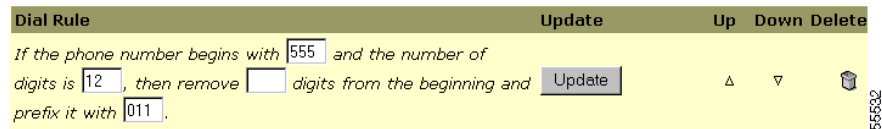
external line codes, and other dialing prefixes directly into your personal address book, you do not need to rely on the Dial Rules page to set up these dialing patterns.

Use the following procedure to configure dial rules.

### Procedure

- Step 1** From the main menu, choose **Preferences > Dial Rules**.  
Personal Assistant opens the Dial Rules page.
- Step 2** Fill in the fields that complete the dial rule. You do not need to fill in all of the fields. Dashes and parentheses are invisible to Personal Assistant.
- Step 3** Click **Add Rule**.
- Step 4** Personal Assistant displays your rule in text form, as shown in Figure 7-1.

**Figure 7-1**



### Tips

- Dial rules created by your system administrator take precedence over your personal dial rules.
- To edit a dial rule, change the information in the fields near the top of the page and click **Update**. To delete a dial rule, click the **delete icon** that corresponds to that rule.
- You can change the order of multiple dial rules by clicking the **up and down** arrows. Personal Assistant searches your individual dial rules in the order in which they appear on the Dial Rule page to find the first dial rule that applies. Therefore, the order of your personal dial rules is important.
- To put your dial rules to the test, choose **Tools > Dial Rule Tester** from the main menu.

**Related Topics**

- Using Personal Assistant to Make Calls and Access Voice Mail, page 2-1
- Why Do You Need a Personal Address Book?, page 4-1
- Specifying Your Settings, page 7-3
- How to Use the Dial Rule Tester, page 8-3

## Specifying Your Settings

Use the following procedures to configure your settings:

- Turning Personal Assistant Off and On, page 7-3
- Using the Alternate Name Feature, page 7-4
- Changing the Time Zone, page 7-6
- Setting the Name Dialing Preference, page 7-7
- Resetting Your Spoken Name, page 7-8
- Setting the Call Pick-Up Time-Out Feature, page 7-9

## Turning Personal Assistant Off and On

You can turn off rule processing without changing your rule-set schedule. Turning off rule processing de-activates the call-forwarding and screening feature only; it does not deactivate name dialing, voice mail browsing and conferencing features.

When you disable Personal Assistant's rule processing feature, your calls will be forwarded as they were before you turned it on. Typically, this means your incoming calls will reach your desk phone.

**Procedure**

- 
- Step 1** From the main menu, choose **Preferences > Settings**.  
Personal Assistant opens the Settings page.
- Step 2** Check the “Turn off Cisco Personal Assistant” check box, as shown in Figure 7-2.

**Figure 7-2**

Personal Assistant: Select to turn off Personal Assistant.

Turn off Personal Assistant:

52851

Check the box again at the time that you want to enable the call-forwarding feature.

---

**Tips**

- Once disabled, your Personal Assistant saves your rule-sets but does not activate them. Your calls are now forwarded as they were before you set up your Personal Assistant.
- Another option is to de-activate a rule-set without turning off rule processing. To accomplish this, go back to the Activate Rule-Sets page and select “Click to Select” in place of rule-set names from the drop-down menus.

**Related Topics**

- Using the Alternate Name Feature, page 7-4
- Changing the Time Zone, page 7-6
- Setting the Name Dialing Preference, page 7-7
- Resetting Your Spoken Name, page 7-8
- Setting the Call Pick-Up Time-Out Feature, page 7-9

## Using the Alternate Name Feature

The following sections describe the alternate name feature and how to use it:

- What is the Alternate Name Feature?, page 7-5
- When to Use the Alternate Name Feature, page 7-5
- How to Specify an Alternate Name, page 7-6

## What is the Alternate Name Feature?

The alternate name feature allows Personal Assistant to recognize you by one or more alternate names that you specify. Alternate names are different from the version of your name that shows up in the corporate directory; but how different is up to you.

See the “When to Use the Alternate Name Feature” section on page 7-5.

## When to Use the Alternate Name Feature

In general, use the alternate name feature when you want to help callers reach you successfully through speech-enabled directory dialing or spell-by-name.

For example, use the alternate name feature to specify a shortened version of your name if people know you by the short version. While Personal Assistant already recognizes hundreds of common shortened names (Bill in place of William, for example), you might need to specify the shortened version of an uncommon name.

Because Personal Assistant knows how to “read” names for pronunciation, you can specify an alternate spelling of your name to provide an easy-to-say version. Callers may not know how to pronounce the name “Wei,” for example. By looking at the spelling, callers might try to pronounce it like “Why.” To make sure all callers can reach you through directory dialing, you might choose to enter “Why” as an alternate name.

Additionally, some callers may know your name by sound only, and think to spell it “Way.” To make sure all callers can reach you through spell-by-name dialing, you might enter “Way” as an alternate name, as shown in Figure 7-3.

**Figure 7-3**

Alternate Name: Allow others to call me by the following names.			
First Name	<input type="text" value="Way"/>	Add	<div style="border: 1px solid gray; padding: 2px;">Way</div> Remove
Last Name	<input type="text"/>	Add	<div style="border: 1px solid gray; padding: 2px;">Add Name</div> Remove

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See the “How to Specify an Alternate Name” section on page 7-6 for instructions.

## How to Specify an Alternate Name

The following section explains how to specify an alternate name for yourself.

### Procedure

---

- Step 1** From the main menu, choose **Preferences > Settings**.  
Personal Assistant opens the Settings page.
- Step 2** In the Alternate Name section of the Settings page, enter information in Name fields and click **Add**. You are not required to fill in both fields.
- Step 3** To remove an alternate name, select the name and click **Remove**.
- 

### Tips

Personal Assistant cannot identify you by your newly established alternate name until your system administrator refreshes user information. System refreshes vary by company; check with your system administrator if you want information about the refresh schedule for your system.

### Related Topics

- Turning Personal Assistant Off and On, page 7-3
- Changing the Time Zone, page 7-6
- Setting the Name Dialing Preference, page 7-7
- Resetting Your Spoken Name, page 7-8
- Setting the Call Pick-Up Time-Out Feature, page 7-9

## Changing the Time Zone

If you build rules that include Time of Day limitations, it is important to set the time zone. You may need to reset the time zone when you travel.

### Procedure

---

- Step 1** From the main menu, choose **Preferences > Settings**.

Personal Assistant opens the Settings page.

- Step 2** Select a time zone from the Time Zone drop-down menu.  
Your time-based rules now reflect the new time zone.
- 

#### Related Topics

- Turning Personal Assistant Off and On, page 7-3
- Using the Alternate Name Feature, page 7-4
- Setting the Name Dialing Preference, page 7-7
- Resetting Your Spoken Name, page 7-8
- Setting the Call Pick-Up Time-Out Feature, page 7-9

## Setting the Name Dialing Preference

Personal Assistant uses speech-enabled directory dialing to dial phone numbers based on your spoken commands. If you say, “Call Harriet Smith,” for example, Personal Assistant searches both the corporate directory and your personal address book for a name that matches your spoken command.

However, if you select the Name Dialing Preference, Personal Assistant restricts its search to the personal address book. In this case, Personal Assistant does not look in the corporate directory.

For information about why you might want to set the Name Dialing Preference, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6.

Use the following procedure to set the Name Dialing Preference:

#### Procedure

---

- Step 1** From the main menu, choose **Preferences > Settings**.  
Personal Assistant opens the Settings page.
- Step 2** Check the Name Dialing Preference box, as shown in Figure 7-4.

**Figure 7-4**

**Name Dialing Preference: Select to look only in personal Address Book when dialing by name.**

Look only in Address Book:

62842

Check the box again if you want to remove the selection.

---

### Tips

You cannot assign nicknames to people who are in the corporate directory without first copying them into your personal address book. For instructions, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6.

### Related Topics

- Using Personal Assistant to Make Calls and Access Voice Mail, page 2-1
- Setting Up Your Personal Address Book, page 4-1
- Turning Personal Assistant Off and On, page 7-3
- Using the Alternate Name Feature, page 7-4
- Resetting Your Spoken Name, page 7-8

## Resetting Your Spoken Name

The first time you call Personal Assistant, it prompts you to say your name. Personal Assistant uses this recording to identify you to other callers and to greet you in the future. If you don't like your recorded name, you can change it.

Use the following procedure to reset your spoken name.

### Procedure

---

- Step 1** From the main menu, choose **Preferences > Settings**.  
Personal Assistant opens the setting page.
- Step 2** Click the **Reset Spoken Name** button.



**Figure 7-5**

Spoken Name: Click this button to re-record your name the next time you call Personal Assistant.

Reset Spoken Name

55767

**Step 3** Call the Personal Assistant and re-record your spoken name.

---

**Related Topics**

- Turning Personal Assistant Off and On, page 7-3
- Using the Alternate Name Feature, page 7-4
- Using the Alternate Name Feature, page 7-4
- Changing the Time Zone, page 7-6
- Setting the Name Dialing Preference, page 7-7
- Setting the Call Pick-Up Time-Out Feature, page 7-9

## Setting the Call Pick-Up Time-Out Feature

The call pick-up time-out feature controls how many seconds Personal Assistant rings each destination in a destination group before moving on to the next destination.

The default setting for the time-out feature is eight seconds. Because each ring takes about three seconds, the eight second default setting means that Personal Assistant allows approximately two to three rings at each destination before trying the next destination in the group.

**Figure 7-6**

Call Pickup Timeout: Enter the timeout in seconds.

10

55768

To get to the time-out feature, choose **Preferences > Settings** from the main menu.

**Related Topics:**

- Turning Personal Assistant Off and On, page 7-3
- Using the Alternate Name Feature, page 7-4
- Changing the Time Zone, page 7-6
- Setting the Name Dialing Preference, page 7-7
- Resetting Your Spoken Name, page 7-8
- Changing Your Password, page 7-10

## Changing Your Password

The first time you log in to the Personal Assistant User interface, Personal Assistant takes you directly to the Update Password page. After initially choosing a password, you can update your password any time by using this procedure.

**Procedure**

- 
- Step 1** From the main menu, choose **Preferences > Password**.  
Personal Assistant displays the Update Password page, as shown in Figure 7-7.

**Figure 7-7**

Please enter your current password

Enter a new password

Enter your new password to confirm it

55895

- Step 2** Follow the instructions for updating your password.
-

**Tips**

If you forget your password, ask your system administrator to reset your default password. Personal Assistant will prompt you to customize the default password.

**Related Topics**

- [Where Do You Set Up Call Forwarding Rules?](#), page 1-13
- [Setting Dial Rules](#), page 7-1
- [Specifying Your Settings](#), page 7-3





## Testing Your Rules

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The following sections explain how to use testing options in the tools menu.

- How to Use the Call Forwarding Rule Tester, page 8-1
- How to Use the Dial Rule Tester, page 8-3

### How to Use the Call Forwarding Rule Tester

The call forwarding rule tester lets you see how Cisco Personal Assistant would forward a hypothetical incoming call based on your actual rules.

Use the rule tester when you want to put a rule, or set of rules, to the test. You might choose to do this after building a rule and activating a rule-set to see if the rule applies to a specific caller or to an incoming call that reaches you at a specific time of day.

The call forwarding rule tester is also a good way to diagnose a call forwarding problem. For example, if Personal Assistant did not forward a phone call in the way that you anticipated, enter the name of the real caller, the time of day and date during which the call was placed, and the rule tester can help you figure out what part of your rule-set Personal Assistant would apply to the incoming call.

#### **Before You Begin**

Before you begin to use the call forwarding rule tester, you need to create a rule-set, add at least one rule to it, then activate the rule-set. For instructions on these procedures, see the “Building Rules” section on page 6-5.

## Procedure

---

- Step 1** From the main menu, choose **Tools > Call Forwarding Rule Tester**.  
Personal Assistant opens the Call Forwarding Rule Tester page.
- Step 2** Enter the information that you want to try out in your hypothetical incoming call.  
The call forwarding rule tester allows you to specify up to four factors:
- the name of the caller
  - the time of day
  - the calendar date
  - the year
- You can combine these factors to test a hypothetical call in which the caller, time, date and year date are all specified. Or you can choose one factor, such as the time of day. The combination of factors is up to you.
- Step 3** Click **Test**.  
If one of your rules applies to the call conditions that you specified, Personal Assistant displays the rule.  
If none of your rules applies to the incoming call conditions that you specified, Personal Assistant displays the message: “No matching rule found.” When none of your rules matches the conditions of a real incoming call, Personal Assistant simply forwards the call to your desk phone, which is your default phone.
- 

## Tips

- When using the call forwarding rule tester to diagnose why Personal Assistant did not forward a call in a particular way, start by providing broad conditions for the rule tester. For example, provide a name or a time of day. If the rule applies to the hypothetical call under broad conditions, begin to narrow the conditions to single out the reason your rule did not apply to the incoming phone call.
- To get results with the call forwarding rule tester, the rule-set that contains your tested rule must be active.

**Related Topics**

- Using Your Personal Address Book, page 4-2
- Setting Dial Rules, page 7-1
- How to Use the Dial Rule Tester, page 8-3

## How to Use the Dial Rule Tester

The following sections explain what the Dial Rule Tester is and why you might use it.

- What is the Dial Rule Tester?, page 8-3
- When to Use the Dial Rule Tester, page 8-3

## What is the Dial Rule Tester?

The dial rule tester lets you preview how Personal Assistant will dial or recognize a phone number based on dial rules that are set up by you or, more typically, by your system administrator.

Dial rules simply determine the string of digits that Personal Assistant uses to place outbound calls and to recognize inbound calls. For example, dial rules are responsible for filling in the rest of the phone number when you call extension 1-2-3-4 to reach a colleague at work. The dial rule tester works in tandem with dial rules so that you can see exactly how Personal Assistant will process or recognize a phone number.

See the “When to Use the Dial Rule Tester” section on page 8-3.

## When to Use the Dial Rule Tester

Use the dial rule tester to see how a phone number that you have entered in your personal address book will be processed or recognized by Personal Assistant—whether Personal Assistant uses the number to make an outbound call or to identify an inbound call.

For example, if you entered the phone number 555-4567 in your personal address book, you might want to test whether the dial rules set up by your system administrator tell Personal Assistant to dial the number as 9-555-4567. (In this case, the prefix “9” would allow external calls to be placed from your work phone.)

Dial rules set up by your system administrator probably cover most, if not all, necessary prefix modifications that you need Personal Assistant to make. However, if you use the Dial Rule page of the Cisco Personal Assistant User interface to set up your own dial rules, it is a good idea to use the dial rule tester to try them out. The dial rule tester can reveal whether Personal Assistant would prefix an outbound call appropriately. For more information on setting your own dial rules, see the “Setting Dial Rules” section on page 7-1.

### Procedure

---

- Step 1** Choose **Tools > Dial Rule Tester** from the main menu. Personal Assistant opens the Dial Rule Tester page.
- Step 2** Enter a phone number in the first field and click **Test**. If you want to test how dial rules apply to a phone number in your personal address book, use the first field to enter the number exactly as it appears in your address book. Personal Assistant displays the number in the second field, showing prefix modifications determined by the most applicable dialing rule.



**Note** Do not confuse *dial rules* with call forwarding and screening rules. Dial rules determine the string of digits that Personal Assistant uses to place outbound calls and to recognize inbound calls. Unless you have special prefix requirements, you can let your system administrator set up your dial rules. Call forwarding and screening rules, on the other hand, are designed by you. These rules tell Personal Assistant how to selectively forward and screen your incoming calls based on the identity of the caller, the time of day, and other conditions.

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**Related Topics**

- Using Your Personal Address Book, page 4-2
- Setting Dial Rules, page 7-1
- How to Use the Call Forwarding Rule Tester, page 8-1





## Common Questions about Using Cisco Personal Assistant

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The following sections provide common questions (and answers) about using Cisco Personal Assistant:

- Using Speech-enabled Dialing, page A-1
- Browsing Voice Mail, page A-7
- Accessing the Personal Assistant User Interface, page A-11
- Specifying Destinations, page A-13
- Using the Personal Address Book, page A-16
- Setting up Rules and Rule-Sets, page A-20
- Customizing Dial Rules and Settings, page A-26

### Using Speech-enabled Dialing

The following sections provide common questions (and answers) about using speech-enabled dialing:

- Can I access Personal Assistant when I am away from the office?, page A-2
- Why does Personal Assistant sometimes identify callers or called parties by extension, and other times by name?, page A-2
- When I apply call screening, why does Personal Assistant tell some callers to record their names?, page A-3

- How do I set up call screening and what does it sound like to my callers?, page A-3
- How can I make my name easier to pronounce for directory dialing?, page A-4
- What is directory dialing?, page A-4
- Personal Assistant does not recognize my new alternate name. Why not?, page A-4
- What can I do to help Personal Assistant understand my directory dialing commands?, page A-5
- Why does Personal Assistant sometimes offer me only touch-tone options, rather than speech options?, page A-5
- Why did spell-by-name fail?, page A-6
- There are several people with the same name in my company. How do I tell Personal Assistant to call one of these people?, page A-6
- Why is Personal Assistant telling my callers that I am unavailable?, page A-6
- I am getting technical difficulty messages. What do I do?, page A-7

## Can I access Personal Assistant when I am away from the office?

Q.) Can I use Personal Assistant to make phone calls and check my voice mail when I'm away from the office?

A.) Yes, Personal Assistant's directory dialing and voice mail features are accessible from any phone. Simply dial Personal Assistant to get connected. For instructions and examples, see the "Getting Started with Dialing and Conferencing" section on page 1-2.

## Why does Personal Assistant sometimes identify callers or called parties by extension, and other times by name?

Q.) Why does Personal Assistant play phone number extensions sometimes instead of playing the recording of the person saying his or her name?

A.) When you place a call with speech-enabled dialing, Personal Assistant uses a name or number to identify the person to whom the call is being placed. Personal Assistant can only play the party's recorded name if that recording is available. Otherwise, it plays the party's office extension or phone number.

Additionally, Personal Assistant will play the phone number of a party not included in the corporate directory, but whom you have added to your personal address book.

For instructions and examples, see the “Getting Started with Dialing and Conferencing” section on page 1-2.

## When I apply call screening, why does Personal Assistant tell some callers to record their names?

Q.) With call screening enabled, Personal Assistant asks some callers to record their names before sending the call to me. Why?

A.) Personal Assistant asks a caller to record his or her name for call-screening identification purposes if the caller's phone number is blocked.

## How do I set up call screening and what does it sound like to my callers?

Q.) What do my callers hear when Personal Assistant screens their calls? What happens if I'm not there to get the call?

A.) When call screening applies to an incoming phone call, Personal Assistant tells you who is calling and gives you options to forward or accept the call, or send the call to voice mail. To set up call screening, specify call screening in a rule. Call screening then applies to those incoming calls that are affected by that particular rule.

Your callers hear “Please wait while locating” when the call screening feature is active.

If you are not able to pick up a screened call, Personal Assistant eventually sends the incoming call to your default destination, which typically is your desk phone and integrated voice mail system.

For more details, see the “Using the Call Screening Feature” section on page 6-19.

## How can I make my name easier to pronounce for directory dialing?

Q.) People who use speech-enabled directory dialing to call me complain that my name is not recognized by Personal Assistant. What can I do to make my name easier for others to pronounce and for Personal Assistant to understand?

A.) Set up one or more alternate names for yourself. From the main menu, choose **Preferences > Settings** and go to the Alternate Names section of the page. For an example, see the “Using the Alternate Name Feature” section on page 7-4.

## What is directory dialing?

Q.) What is directory dialing?

A.) Directory dialing means using spoken commands to call co-workers at numbers recognized by your company and contained within the corporate directory. For examples and instructions, see the “Dialing and Conferencing Sample Dialogs” section on page 1-3 and the “Using Speech-enabled Directory Dialing” section on page 2-4.

## Personal Assistant does not recognize my new alternate name. Why not?

Q.) I recently set up an alternate name for myself, but callers who have tried it found that it didn't work. What's wrong?

A.) Personal Assistant cannot recognize your newly established alternate name until your system administrator refreshes user information. Refresh schedules vary by company, but are typically conducted daily. Contact your system administrator if you want to know about the Personal Assistant refresh schedule for your server.

For help with alternate names, see the “Using the Alternate Name Feature” section on page 7-4.

## What can I do to help Personal Assistant understand my directory dialing commands?

Q.) Personal Assistant has difficulty understanding me when I use directory dialing to place calls. What can I do?

A.) Here are some suggestions for helping Personal Assistant understand your directory dialing commands:

- Speak phonetically—Pronounce a person’s name as the spelling suggests.
- Copy the person’s name and number into your personal address book and create an easy-to-pronounce nickname for the person. Store the nickname in your personal address book. Additionally, you can tell Personal Assistant to look only in your personal address book (and not in the corporate directory) when searching for a match to the name you have provided. To do this, choose **Preferences > Settings** from the main menu, then check the Name Dialing Preference check box.
- Find out if the person has set up an alternate name. If so, you can say the alternate name instead of the actual name in your directory dialing commands.

For help with nicknames, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6. For an alternate name example, see the “Using the Alternate Name Feature” section on page 7-4.

## Why does Personal Assistant sometimes offer me only touch-tone options, rather than speech options?

Q.) Sometimes Personal Assistant gives me only touch-tone prompts, telling me to enter the person’s extension on my key pad or to use spell-by-name. When this happens, Personal Assistant no longer recognizes my spoken commands. What’s going on?

A.) This can happen when Personal Assistant cannot access the speech servers it needs to satisfy your spoken requests. In these cases, Personal Assistant places you in a non-speech mode. In this mode, you can place calls by entering the person’s extension or by spelling the person’s name.

## Why did spell-by-name fail?

Q.) I tried to call John Smith using Personal Assistant's spell-by-name feature. I used the key pad to spell "Smith, John." Personal Assistant could not find his number. Why?

A.) Spell the last name followed by #, then the first name followed by #. You can also enter a partial last name followed by a partial first name; this is especially useful when the name is long. In this example, you could enter **SMI#** followed by **JO#**. Personal Assistant will call John Smith's number or prompt you to select from a list of names if the combination of letters is not unique.

## There are several people with the same name in my company. How do I tell Personal Assistant to call one of these people?

Q.) My company has five John Smiths; when I use directory dialing to try to reach one of them, Personal Assistant transfers me to the operator. What should I do?

A.) To differentiate a particular person in your company from others with the same name, copy that person's information from your corporate directory to your personal address book. Then create a nickname and say the nickname instead of the real name in your spoken command.

For more information on nicknames, see the "Copying a Corporate Directory Entry Into Your Personal Address Book" section on page 4-6 and the "Setting the Name Dialing Preference" section on page 7-7.

## Why is Personal Assistant telling my callers that I am unavailable?

Q.) My callers are getting a message that says, "The person you are trying to reach unavailable." That's not true. What's going on?

A.) Make sure your personal and corporate destinations are correct. If Personal Assistant tries to forward an incoming phone call to you at an invalid number, your caller will hear the unavailable message. For help with destinations, see the "What Are Destinations?" section on page 3-1.



## I am getting technical difficulty messages. What do I do?

Q.) I keep getting a message that says “You are experiencing technical difficulties” when I try to use the interface. What should I do?

A.) Contact your system administrator for help.

## Browsing Voice Mail

The following sections provide common questions (and answers) about browsing voice mail with Personal Assistant:

- Can I listen to voice mail messages from particular callers?, page A-7
- Can I send a voice mail message to someone in my personal address book?, page A-8
- What is an alternative to the voice mail command?, page A-8
- What password do I use to access voice mail?, page A-8
- How do I check messages from phones outside of the office?, page A-9
- Personal Assistant did not delete my voice mail messages. Why not?, page A-9
- Can I tell if I received a new message while browsing voice mail?, page A-9
- Voice mail is not listed among my destinations. Why not?, page A-10
- I do not hear an option for transferring a screened call to voice mail. Why not?, page A-10
- Why do I have voice mail messages from Personal Assistant asking me to accept an incoming call?, page A-10

## Can I listen to voice mail messages from particular callers?

Q.) Can I listen to voice mail messages from particular callers?

A.) Yes. You can direct Personal Assistant to play messages from a particular caller. See the “Getting Started with Voice Mail Browsing” section on page 1-6 for examples. For detailed instructions, main menu options, and valid commands, see the “Browsing Your Voice Mail with Personal Assistant” section on page 2-14.

## Can I send a voice mail message to someone in my personal address book?

Q.) Can I use Personal Assistant to send a voice mail message to someone in my address book?

A.) Voice mail features work with a personal address book entry only if the information that you entered in the address book for the first name, last name, and work number exactly duplicate the corresponding information in the corporate directory. To ensure a perfect replication, use the “copy callers” function to duplicate corporate directory entries into the personal address book. For instructions, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6.

## What is an alternative to the voice mail command?

Q.) I have difficulty saying “voice mail.” What other commands can I use to prompt Personal Assistant?

A.) In addition to “voice mail,” you can say, “check messages,” “get messages,” or “voice messages.” See the “Getting Started with Voice Mail Browsing” section on page 1-6 for various command examples.

## What password do I use to access voice mail?

Q.) What’s the password for logging into voice mail?

A.) The password for accessing your voice mail with Personal Assistant is the same numeric password you have already established for your Cisco Unity voice mail account. See the “Logging in to Voice Mail” section on page 1-7 for more information.

## How do I check messages from phones outside of the office?

Q.) How do I check messages from an external phone?

A.) You can check your voice mail from any phone. However, if you are calling from a phone external to your company, Personal Assistant will ask you to provide your office extension unless you have already established the external line from which you are calling as a “destination.” For help with destinations, see the “What Are Destinations?” section on page 3-1.

If you are calling from a colleague’s desk phone (or an internal line other than your own), say “New mailbox” or “New extension.” See the “Logging in to Voice Mail” section on page 1-7 for more information.

## Personal Assistant did not delete my voice mail messages. Why not?

Q.) Why does Personal Assistant continue to list messages that I just deleted?

A.) These messages are marked for deletion and are actually deleted when you log out.

For examples and instructions regarding spoken commands, see the “Getting Started with Voice Mail Browsing” section on page 1-6 and the “Browsing Your Voice Mail with Personal Assistant” section on page 2-14.

## Can I tell if I received a new message while browsing voice mail?

Q.) How do I know if new messages were delivered while I was listening to other messages?

A.) If there are any new messages delivered, Personal Assistant provides a summary of messages when you go back to the voice mail main menu. You can also say “announce messages” or “message summary” to check the latest count of new and old messages. For more verbal commands, see the “Using Spoken Commands While Listening to Messages” section on page 2-21.

## Voice mail is not listed among my destinations. Why not?

Q.) Why don't I see my voice mail number listed among my other destinations, such as my office phone and corporate mobile phone?

A.) Voice mail only appears as a destination if your system administrator has established a voice mail server for you. For help with destinations, see the "What Are Destinations?" section on page 3-1.

## I do not hear an option for transferring a screened call to voice mail. Why not?

Q.) Why doesn't Personal Assistant list voice mail among my options for dealing with a screened call?

A.) Your system administrator has not configured the voice mail number in your system configuration.

For help with call screening, see the "Using the Call Screening Feature" section on page 6-19.

## Why do I have voice mail messages from Personal Assistant asking me to accept an incoming call?

Q.) I have voice mail messages from Personal Assistant that say, "You have a call from...." These are not regular voice mail prompts, but recordings from Personal Assistant. What's going on?

A.) These messages can occur when you have set up a call forwarding rule that includes a destination group. In this case your office voice mail and even your home answering machine (if your home line is established as a destination) can pick up and record the message that Personal Assistant intended to deliver to you at the time that it had your caller on hold. To prevent this from happening, decrease the amount of time that Personal Assistant tries calling each of the destinations in the group.

Control the number of seconds with the Call Pick-Up Time-Out setting. The default setting is eight seconds, but you can override the default setting. See the "Setting the Call Pick-Up Time-Out Feature" section on page 7-9 for instructions.

# Accessing the Personal Assistant User Interface

The following sections provide common questions (and answers) about using the Personal Assistant User interface:

- What is the Personal Assistant User interface?, page A-11
- Why do I need to log in again?, page A-11
- What can I do if I forgot my password?, page A-11
- How do I get rid of the pre-stocked samples?, page A-12
- Why does Personal Assistant sometimes say that I am already logged in?, page A-12
- Do I need to access or set up the User interface to use Personal Assistant?, page A-12

## What is the Personal Assistant User interface?

Q.) What is the Personal Assistant User interface and how do I find it?

A.) The interface contains all the Personal Assistant help information and all of the configurable screens that you can see on your computer. Access the User interface through your web browser, using the URL that your system administrator provided. For more help, see the “Where Do You Set Up Call Forwarding Rules?” section on page 1-13.

## Why do I need to log in again?

Q.) Why do I sometimes have to log back on when I'm using the Personal Assistant User interface?

A.) Personal Assistant asks you to log in again following 30 minutes of inactivity.

## What can I do if I forgot my password?

Q.) I forgot my password. What can I do?

A.) Contact your system administrator. Your administrator will give you a temporary password. Personal Assistant prompts you to customize this password as soon as you log in.

For help with changing your password, in general, see the “Changing Your Password” section on page 7-10.

## How do I get rid of the pre-stocked samples?

Q.) Can I delete the sample rules and destinations that I keep seeing in the User interface?

A.) The samples will not interfere with your own rules, but you can delete them if you want to. Begin by deleting the rule, then the destination group, followed by individual destinations. For more information about samples, including the order in which to perform deletions, see the “Getting Started with Sample Information from the Welcome Page” section on page 1-15.

## Why does Personal Assistant sometimes say that I am already logged in?

Q.) Why do I sometimes get a screen when I open Personal Assistant that says “The user is already logged in elsewhere”?

A.) If you closed your web browser without logging out of the Personal Assistant User interface, you will see this message the next time you log in to Personal Assistant. To log out, choose **Session > Logout** from the main menu.

## Do I need to access or set up the User interface to use Personal Assistant?

Q.) Do I need to configure the Personal Assistant User interface in order to use Personal Assistant’s features?

A.) It depends upon which features you want to use. You can use Personal Assistant to browse your voice mail and place calls to people *internal* to your company without first setting up your User interface. However, you cannot call people external to your company with Personal Assistant until you set up

these external parties in your personal address book through the User interface. Additionally, you can set up personal destinations in the interface if you want Personal Assistant to forward calls to a non-work phone number. There are other features that require configuration in the User interface, such as call screening.

For a quick introduction to the User interface, see the “Getting Started from the Welcome Page” section on page 1-13 and the “Quick Setup Example” section on page 1-16.

## Specifying Destinations

The following sections provide common questions (and answers) about using destinations and destination groups:

- Where do I enter numbers for my private phone lines?, page A-13
- Why can't I change my mobile phone number?, page A-14
- Why is one of my destinations listed as undefined?, page A-14
- Why would I want to create a destination group?, page A-14
- How do I change the sequence of destinations in a group?, page A-15
- Why would I want to set up personal destinations?, page A-15
- Why does Personal Assistant page me when it sends my calls to a destination group?, page A-16
- Can I change the name of a destination group or caller group?, page A-16

## Where do I enter numbers for my private phone lines?

Q.) Where do I enter phone numbers other than work-related numbers so that Personal Assistant can send my incoming calls to them? For example, I want to receive some of my forwarded calls on my personal mobile phone.

A.) Choose **Destinations > Destinations** from the main menu and follow the directions. For more detailed instructions, see the “Adding Personal Destinations” section on page 3-2.

Note that destinations can also include email-based paging addresses, in addition to phone numbers. For information, see the “Using Personal Assistant to Send and Receive Email-Based Paging Messages” section on page 2-8.

## Why can't I change my mobile phone number?

Q.) Why can't I change my mobile phone number from the way it appears on the Destinations page?

A.) If your mobile phone is a corporate number, you cannot change it. All of your corporate numbers are assigned to you. Your company email-based paging address is also assigned to you. If you have your own personal mobile phone, you can add this to the destinations page and change the number at your discretion.

For more information, see the “What Are Destinations?” section on page 3-1.

## Why is one of my destinations listed as undefined?

Q.) The Personal Assistant User interface listed one of my destinations as “undefined” instead of displaying the phone number. Why?

A.) Destinations become “undefined” when they are deleted from the corporate directory. Any active rule-sets containing an undefined destination will be de-activated.

## Why would I want to create a destination group?

Q.) Why would I want to create a destination group rather than creating several separate destinations?

A.) Use a destination group to send one incoming phone call to a series of destinations. With destination groups, you can tell Personal Assistant: “Try calling me at my desk phone, then try me on my home phone, then try me on my mobile phone,” for example. Personal Assistant calls each destination in the group sequentially, until the call connects or the caller hangs up. For more information and instructions, see the “Adding a New Destination Group” section on page 3-7.

The order in which Personal Assistant calls each destination in the group is determined by the order in which you added the destinations to the group. For more information, see the “Ordering Destinations in a Destination Group” section on page 3-7.



## How do I change the sequence of destinations in a group?

Q.) I want to change the sequence of destinations in my destination group. How do I do that?

A.) Delete them and add them again.

The sequence in which Personal Assistant dials each destination in a destination group mimics the sequence in which you added each destination to the group. For example, if you add destinations A, B, and C to a destination group in the order of C, A, and B, Personal Assistant calls destination C first, then destination A, then destination B.

To change the order in which Personal Assistant calls destinations in a group, you need to delete and re-add destinations to the group in the sequence that you want Personal Assistant to follow.

The only exception is an email-based pager; if a destination group contains a pager, Personal Assistant dispatches an email-based paging message at the same time that it calls the first phone number in the sequence.

For detailed instructions, see the “Creating Destination Groups” section on page 3-4.

## Why would I want to set up personal destinations?

Q.) What’s the advantage of setting up my home phone, personal mobile phone, or other non-work phone as a personal destination?

A.) Once you set up a line as a destination, Personal Assistant knows how to recognize you when you call from that line. That allows you to access your personal address book and to include the line as a destination in your call forwarding and screening rules.

Additionally, set up personal destinations so that other people can refer to you by name in their own call forwarding and screening rules.

## Why does Personal Assistant page me when it sends my calls to a destination group?

Q.) Why does Personal Assistant page me when calling numbers in my destination group? I even made sure that the email-based paging destination was added to the group last, and Personal Assistant still pages me as soon as it begins calling the first phone number in the group.

A.) Pagers are an exception to the sequential calling pattern in a destination group. If you have included an email-based paging address in your destination group, Personal Assistant will dispatch an email-based page to you at the same time that it calls the first phone number in the sequence of destinations. See the “Ordering Destinations in a Destination Group” section on page 3-7.

For paging information, see the “Using Personal Assistant to Send and Receive Email-Based Paging Messages” section on page 2-8.

## Can I change the name of a destination group or caller group?

Q.) I want to change the name of a destination group or caller group. Can I do that?

A.) Yes. First copy the contents of the group that you want to rename by clicking the copy icon. Then give the copied group a new name and delete the original group. For detailed instructions, see the “Copying a Destination Group” section on page 3-11.

## Using the Personal Address Book

The following sections provide common questions (and answers) about using the personal address book:

- Where do I enter phone numbers for customers and friends?, page A-17
- What format should I use to enter phone numbers?, page A-17
- Is there a way for me to see the details of an address book entry without editing the entry?, page A-18

- Can I access my personal address book when I am away from the office?, page A-18
- If I have several phone numbers for someone in my personal address book, which number does Personal Assistant call?, page A-19
- Do I need to train Personal Assistant to recognize nicknames in my address book?, page A-19

## Where do I enter phone numbers for customers and friends?

Q.) Where do I enter phone numbers for customers and friends, or anyone who's not in the corporate directory?

A.) Put these numbers in your personal address book. You can also copy callers from your corporate directory into your personal address book. For more information, see the “Using Your Personal Address Book” section on page 4-2.



### Note

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The email field in the personal address book is for reference only; you cannot use the address as a point of contact via Personal Assistant. However, Personal Assistant does recognize an email-based paging address as a valid *destination*. Set up and view your destinations on the Destinations page.

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## What format should I use to enter phone numbers?

Q.) What format should I use to enter phone numbers in my personal address book or in the Destinations page? For example, do I use an area code? Do I include “9” for external numbers? Does it matter whether I use dashes or parentheses?

A.) Because your system administrator determines the default dialing rules for Personal Assistant, these rules may vary from one administrator to another. However, in most cases, you are likely to use the following formats:

- For phone numbers outside of your work area code, use xxx-xxx-xxxx. Your system administrator has probably already added the 9-1 (or equivalent dialing prefix) necessary for this type of call.

- For phone numbers inside your work area code, but external to the company, use xxx-xxxx. Your system administrator has probably already added the 9 (or equivalent dialing prefix) necessary for this type of call.
- For internal phone extensions, use the abbreviated internal dialing format for your company, such as xxxx or x-xxxx

You can use parentheses, spaces and dashes if you'd like; Personal Assistant ignores these in phone numbers. For information about setting up your personal address book, see the "Adding an Address Book Entry" section on page 4-2.

For more information about default dialing rules, see the "Setting Dial Rules" section on page 7-1.

## Is there a way for me to see the details of an address book entry without editing the entry?

Q.) Sometimes I want to quickly glance at someone's phone number in my address book, but I don't want to open the whole entry or edit the entry. Is there a quick way to see the information?

A.) Yes. When you position your mouse over the caller icon (an image of a person's head) you can see a small tool tip that displays the party's nickname, phone numbers, and email address (if available).

This tool tip feature also works for search results in the Caller Search window.

## Can I access my personal address book when I am away from the office?

Q.) Can I use Personal Assistant to place calls to people in my personal address book when I'm calling from my home phone or mobile phone?

A.) You can access your address book from any phone that Personal Assistant recognizes as one of your "destinations." Destinations include phone numbers and email-based paging addresses assigned to you by your company or established by you through the Cisco Personal Assistant User interface.

**Note**

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You can access the corporate directory (in contrast to the personal address book) from any phone, whether or not Personal Assistant recognizes the phone as a destination. Use the corporate directory to perform “directory dialing.” Directory dialing means using spoken commands to call co-workers at numbers recognized by your company and contained within the corporate directory.

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If you need to view, create, or change personal address book entries, use the Personal Assistant User interface. Choose **Callers > Address Book** from the main menu.

For instructions about destinations, see the “Adding Personal Destinations” section on page 3-2. For help with personal address book entries, see the “Adding an Address Book Entry” section on page 4-2. For help with using speech-enabled dialing, see the “Using Speech-enabled Directory Dialing” section on page 2-4.

## If I have several phone numbers for someone in my personal address book, which number does Personal Assistant call?

Q.) I have several numbers for one person in my personal address book. Which number will personal Assistant call if I specify only the person’s name in a spoken command?

A.) If you don’t specify where you want Personal Assistant to dial, and there is more than one number available, Personal Assistant calls the work number.

If no work number is listed, but more than one number is available, Personal Assistant asks you to specify the number that you want to use.

## Do I need to train Personal Assistant to recognize nicknames in my address book?

Q.) I recently created a nickname for someone in my personal address book. The nickname is not a common version of the person’s real name. Do I need to train Personal Assistant to recognize my pronunciation of the nickname or can I begin using the nickname in conjunction with speech-enabled dialing right away?

A.) As long as you pronounce the nickname phonetically, Personal Assistant will recognize the spoken version of the nickname as corresponding to the spelled-out version that you added to the address book. You cannot train Personal Assistant to identify nicknames.

For instructions about creating a nickname, see the “Copying a Corporate Directory Entry Into Your Personal Address Book” section on page 4-6.

## Setting up Rules and Rule-Sets

The following sections provide common questions (and answers) about using rules and rule-sets:

- How do I create a rule that applies to everyone?, page A-21
- How do I schedule a rule-set so it applies to all my incoming calls every day, indefinitely?, page A-21
- How do I schedule one temporary and one permanent rule-set?, page A-21
- How does Personal Assistant decide which rule to use when a rule-set contains more than one rule?, page A-22
- How do I create two time-based rules for same person?, page A-23
- How do I change the name of a rule-set?, page A-23
- Where is the call screening option on the Rule page?, page A-23
- Where is the calendar section of the Rule page?, page A-23
- How long until a new rule takes effect?, page A-24
- How do I turn off a rule without deleting it?, page A-24
- Why did my call forwarding rule fail?, page A-24
- Why am I unable to test more than one caller with the Call Forwarding Rule Tester?, page A-25
- Can a call get lost?, page A-25

## How do I create a rule that applies to everyone?

Q.) I want all my calls to go to my voice mail when I'm on vacation. Can I create a rule that applies to everyone?

A.) Yes. Choose a destination in the rule page, but leave most or all of the remaining sections unspecified. For example, if you are planning a trip and want all your calls to go straight to voice mail (without ringing your desk phone), choose "voice mail" as your destination in the Rule page. Then activate the rule-set for the date range of your trip. For more help, see the "Quick Setup Example" section on page 1-16 and the "Building Rules" section on page 6-5.

## How do I schedule a rule-set so it applies to all my incoming calls every day, indefinitely?

Q.) I want to schedule my rule-set to take effect every day and to continue to be in effect indefinitely. How do I do this?

A.) Schedule a rule-set by "activating" the rule-set. To keep a rule-set active continually, either select the rule-set from the "Everyday" drop-down menu (using the Days of the Week section of the Activate Rule-Sets page), or select a cut-off date that is well into the future (using the Date Range section of the Activate Rule-Sets page).

For more information and instructions, see the "Activating a Rule-Set" section on page 6-15.

## How do I schedule one temporary and one permanent rule-set?

Q.) I recently created a temporary rule-set that I want to activate during a week-long business trip. How do I activate the temporary rule-set without permanently disrupting the schedule for my regular rule-set?

A.) You can activate up to three rule-sets in advance so that each takes effect during a specific date range.

In this example, you can schedule both rule-sets so that the business trip rule-set supersedes the regular rule-set for one week, and so that the regular rule-set continues to take effect after that week.

To achieve this, use the Date Range section of the Activate Rule-Sets page, then order the rule-sets from most specific to least specific. Because Personal Assistant uses the first date range that matches, place your most general, or “default” rule-set last. This ordering ensures that all the date ranges can take effect.

You can overlap the date ranges; only one rule-set will take effect at any one time. For example:

- “Business Trip” rule-set, active January 15 - January 22
- “Regular” rule-set, active January 1 - December 31

For more help, see the “Activating Rule-Sets By Specific Dates” section on page 6-17.

## How does Personal Assistant decide which rule to use when a rule-set contains more than one rule?

Q.) I have multiple rules in a rule-set that is active. Which rule will Personal Assistant use?

A.) The first rule that matches the conditions of the incoming call.

Personal Assistant tries each rule in the order in which the rules are displayed in the Rule-Sets page of the Personal Assistant User interface. Moving from top to bottom, Personal Assistant tries each rule in the list until it finds a rule to apply to the incoming phone call. If the first rule in the list matches, Personal Assistant follows that rule and looks no further.

Because Personal Assistant tries to match rules in a top-down order as they appear on the Rule-Sets page, it is important that you order multiple rules from most specific to least specific. This arrangement ensures that Personal Assistant matches calls to a specific rule before trying to match a call to a general rule.

For example, a rule that tells Personal Assistant to send all calls to voice mail should be added *after* a rule that tells Personal Assistant to send calls from Harriet Smith to your mobile phone. If the general voice mail rule is placed first, it will apply to every call, including Harriet Smith’s, and her relatively specific rule will not take effect.

For more information, see the “Changing the Order of Multiple Rules in a Rule-Set” section on page 6-14. For help with the User interface, see the “Where Do You Set Up Call Forwarding Rules?” section on page 1-13.



## How do I create two time-based rules for same person?

Q.) I want to create two time-based rules for the same person. Do I need to create two separate rules?

A.) Yes. If, for example, you want calls from Harriet Smith to reach you on your mobile phone between 3:00 and 5:00 p.m., and on your home phone between 5:00 and 8:00 pm, you need to create two rules within a single rule-set.

For more help, see the “Building Rules” section on page 6-5.

## How do I change the name of a rule-set?

Q.) Can I change the name of a rule-set without deleting and then recreating the rule-set?

A.) No. You must delete and then recreate the rule-set. If Personal Assistant will not allow you to delete the rule-set because it is active, go to the Activate Rule-Sets page and select “Click to Select” in place of the rule-set name.

For instructions, see the “Creating a New Rule-Set” section on page 6-3.

## Where is the call screening option on the Rule page?

Q.) Why can't I find the “do not screen the call” option on the Rule page?

A.) You are probably setting up a rule that includes a destination group. Call screening automatically takes effect, and cannot be de-selected, when you specify a destination group (rather than a single destination) in a rule.

For more information and instructions, see the “Ordering Destinations in a Destination Group” section on page 3-7.

## Where is the calendar section of the Rule page?

Q.) I can't find the calendar section of the Rule page. Why isn't it available?

A.) Personal Assistant displays the “calendar status” section of the Rule page if this feature has been set up by your system administrator.

## How long until a new rule takes effect?

Q.) How soon after I set up a rule does Personal Assistant put it into effect?

A.) Immediately, assuming that you have set the rule up correctly and activated the rule-set to which it belongs. Don't forget to click **Update** on the Activate Rule-sets page.

## How do I turn off a rule without deleting it?

Q.) Can I “turn off” or disable a rule temporarily?

A.) You can turn off a *rule-set*, but not individual rules within the set. There are two ways to disable a rule-set (the container for rules) without deleting the rule-set. You can de-activate the rule-set or you can turn off the rule-processing feature.

To de-activate a rule-set, choose **Rules > Activate Rule-Sets** from the main menu, then select “Click to Select” in place of the rule-set name or names that you want to de-activate.

To turn off the rule-processing feature, choose **Preferences > Settings** from the main menu, then check the Turn Off Personal Assistant check box. Check the box again to turn Personal Assistant back on. Turning off Personal Assistant in this way disables call forwarding and screening features, but does not disable directory dialing, conferencing and voice mail features.



### Note

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Each rule-set can contain a single rule or multiple rules. If you de-activate a rule-set containing a single rule, you are effectively “turning off” an individual rule. If you de-activate a rule-set with multiple rules, you are turning off all those rules.

---

## Why did my call forwarding rule fail?

Q.) I set up a rule and it didn't work. What happened?

A.) First of all, make sure to activate the rule-set that contains the rule. Choose **Rules > Activate Rule-Sets** from the main menu to do this. Don't forget to click **Update** after activating your rule-set. For more information on this procedure, see the "Activating a Rule-Set" section on page 6-15.

If activating your rule-set is not the problem, try troubleshooting with the Call Forwarding Rule Tester. Simply enter information about an incoming call and the rule tester determines whether any rules in your *active* rule-set would apply. You can also use the rule tester to verify that a new rule will forward your calls the way you anticipate it will before you put the rule to the test with real calls. You must activate the rule prior to testing it. For more information and examples, see the "How to Use the Call Forwarding Rule Tester" section on page 8-1.

If you have set up and activated the rule correctly, the rule might have failed because you received more than one call simultaneously. In this case, Personal Assistant intercepts one call, while another, nearly simultaneous, call slips by. The call that is not intercepted is routed to your default phone (typically your desk phone and integrated voice mail system).

## Why am I unable to test more than one caller with the Call Forwarding Rule Tester?

Q.) Why can't I test more than one caller at a time with the call forwarding rule tester?

A.) The call forwarding rule tester is designed to test your rules against any single call arriving at a particular time and date. Since a single call necessarily arrives from one person, the call forwarding rule tester tests only one person, or caller, at a time. For instructions and examples, see the "How to Use the Call Forwarding Rule Tester" section on page 8-1.

## Can a call get lost?

Q.) What happens to an incoming call that Personal Assistant doesn't forward the way that I anticipated? Is the call "lost"?

A.) No. Unless it has a clear call-routing rule to follow, Personal Assistant sends your calls to your default phone. This is the phone to which your calls would be sent if Personal Assistant wasn't involved—typically your desk phone and integrated voice mail system.

For an overview and detailed examples, see the “Getting Started with Call Forwarding Rules” section on page 1-12.

## Customizing Dial Rules and Settings

The following sections provide common questions (and answers) about customizing dial rules and settings:

- Is a dial rule the same thing as a call forwarding and screening rule?, page A-26
- Do my dial rules override my system administrator's dial rules?, page A-27
- Why would I want to use a dial rule?, page A-27
- Why would I use the Alternate Name feature?, page A-27
- Why did my rule specifying time-of-day fail to work?, page A-28
- Can I re-record the spoken name that Personal Assistant uses to identify me?, page A-28

### Is a dial rule the same thing as a call forwarding and screening rule?

Q.) I'm confused. What's the difference between a “dial rule” and a “rule”?

A.) Don't confuse dial rules with call forwarding and screening rules. Dial rules determine the string of digits that Personal Assistant uses to place outbound calls and to recognize inbound calls. Unless you have special prefix requirements, you can let your system administrator set up your dial rules. Call forwarding and screening rules, on the other hand, are designed by you. These rules tell Personal Assistant how to selectively forward and screen your incoming calls based on the identity of the caller, the time of day, and other conditions.

For help with dial rules, see the “Setting Dial Rules” section on page 7-1. For help with call forwarding rules, see the “Getting Started with Call Forwarding Rules” section on page 1-12 and the “What Are Rules and Rule-Sets?” section on page 6-1.

## Do my dial rules override my system administrator's dial rules?

Q.) Do my dial rules override my system administrator's dial rules?

A.) No, but your personal dial rules can supplement your system administrator's dial rules. When looking for a matching dial rule to follow, Personal Assistant searches your system administrator's dial rules first, then Personal Assistant looks in your personal dial rules (if available) for an applicable rule. Personal Assistant always searches your system administrator's rules first.

You can test how Personal Assistant will recognize a phone number based on your dial rules. For instructions, see the “How to Use the Dial Rule Tester” section on page 8-3.

## Why would I want to use a dial rule?

Q.) Why would I want to use a dial rule?

A.) Create a dial rule to insert a prefix before a number, or strip a prefix from a number. It is unlikely that you will need to configure your dial rules, as this feature is primarily handled by your system administrator. However, in unusual cases, you might want to configure dial rules to insert a special access code or long distance prefix in front of particular phone numbers. For help with dial rules, see the “Setting Dial Rules” section on page 7-1.

Note that dial rules are considered an advanced user feature.

## Why would I use the Alternate Name feature?

Q.) Why would I use the Alternate Name feature?

A.) Use the Alternate Name feature to establish another name by which Personal Assistant can recognize you. Note that Personal Assistant already anticipates common shortened names, such as Bill for William.

An alternate name can help people reach you using speech-enabled dialing if your name is hard to pronounce. For more information and examples, see the “Using the Alternate Name Feature” section on page 7-4.

**Note**

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After you establish your alternate name on the Settings page, Personal Assistant cannot use your alternate name until your system administrator refreshes your company’s system information.

---

## Why did my rule specifying time-of-day fail to work?

Q.) Why did my rule specifying time-of-day fail to work?

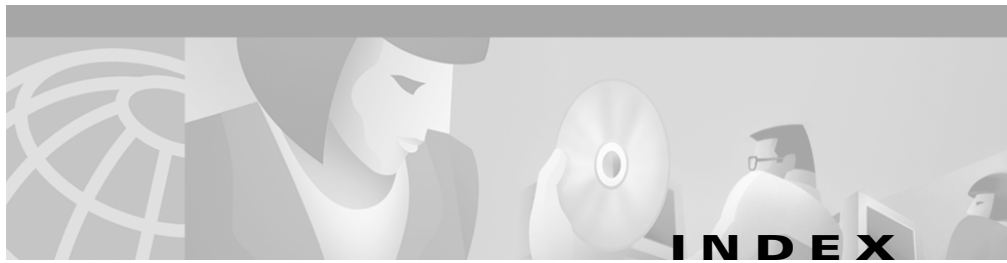
A.) Check whether you have used the 24-hour clock correctly. For example, a rule that forwards calls between 8 am and 5 pm corresponds to 0800 - 1700 on the Rules page.

Also, make sure that Personal Assistant knows your time zone. From the main menu, choose **Preferences > Settings**, then go to the time zone section of the Settings page.

## Can I re-record the spoken name that Personal Assistant uses to identify me?

Q.) I don't like how my spoken name sounds. How do I re-record it?

A.) Choose **Preferences > Settings** from the main menu and click the **Reset Spoken Name** button. The next time you call Personal Assistant, it will prompt you to say your name again.



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