Using Executive and Assistant on Yealink IP Phones with BroadSoft UC One

WWW.YEALINK.COM

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Document Version V1.0

Document Revision History

Version	Change Log
1.0	Edited and published document

Requirements for BroadWorks and IP Phones

BroadWorks (UC ONE) software version:

R20.0/R21.0

Firmware version on IP phones:

T19(P) E2: 53.81.xx.xx
T21(P) E2: 52.81.xx.xx
T23P/G: 44.81.xx.xx
T27P: 45.81.xx.xx
T29G: 46.81.xx.xx
T40P: 54.81.xx.xx
T41P: 36.81.xx.xx
T42G: 29.81.xx.xx
T46G: 28.81.xx.xx
T48G: 35.81.xx.xx
T27G: 69.81.xx.xx
T41S: 36.81.xx.xx
T42S: 29.81.xx.xx
T46S: 66.81.xx.xx
T48S: 65.81.xx.xx

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You will learn

① Application Scenarios

② Configuration on BroadWorks&BTBC

③ Configuration on Yealink phone

④ Feature Show

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① Application Scenarios

Executive and assistant feature provides a new solution for executive/assistant interworking.

- The call to executive can be filtered and screened.
- The filtered calls can be transferred or shared to the opted-in assistant.
- The executive can barge in or retrieve a call answered by an assistant.
- The assistant can push a call to the executive or initiate a call on behalf of an executive.

The following features are configurable for an executive:

- Assistant Permission
- Call Filtering
- Call Screening
- Call Altering

The following features are configurable for an assigned assistant:

- Divert Calls
- Opt-in/Opt-out for an executive

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① Application Scenarios - Executive

Assistant Permission

Configure whether or not the assigned assistants can opt in or opt out.

Call Filtering

Specify which incoming calls to be filtered. The executive can enable or disable call filtering feature, configure the filtering mode to use for filtering and the filter type.

Call Screening

Screen calls (When Filtering feature is enabled), the screening calls will alert executive. The executive can enable or disable call screening feature, configure the alert type to use for screening and whether to alert specific types of locations for screening. If call screening is disabled, the executive will not be alerted by the filtered calls.

Call Alerting

Configure the alert method for assistant. The executive can configure the alert mode for filtered calls, the contents of the Calling Line ID (CLID) name and number to present for filtered calls, the timer for advancing to the next assistant for filtered calls using the sequential alert mode, the timer for triggering the rollover action for filtered calls, the rollover action to apply for filtered calls, and the timer to use for call push recalls.

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① Application Scenarios - Executive-Assistant

Divert Calls

The assistant can enable divert calls feature, and configure the address to divert filtered calls to.

Opt-in/Opt-out for an executive

The assistant can configure whether to opt in or opt out for assigned executives. It is only configurable when the executive assigns assistant permission.

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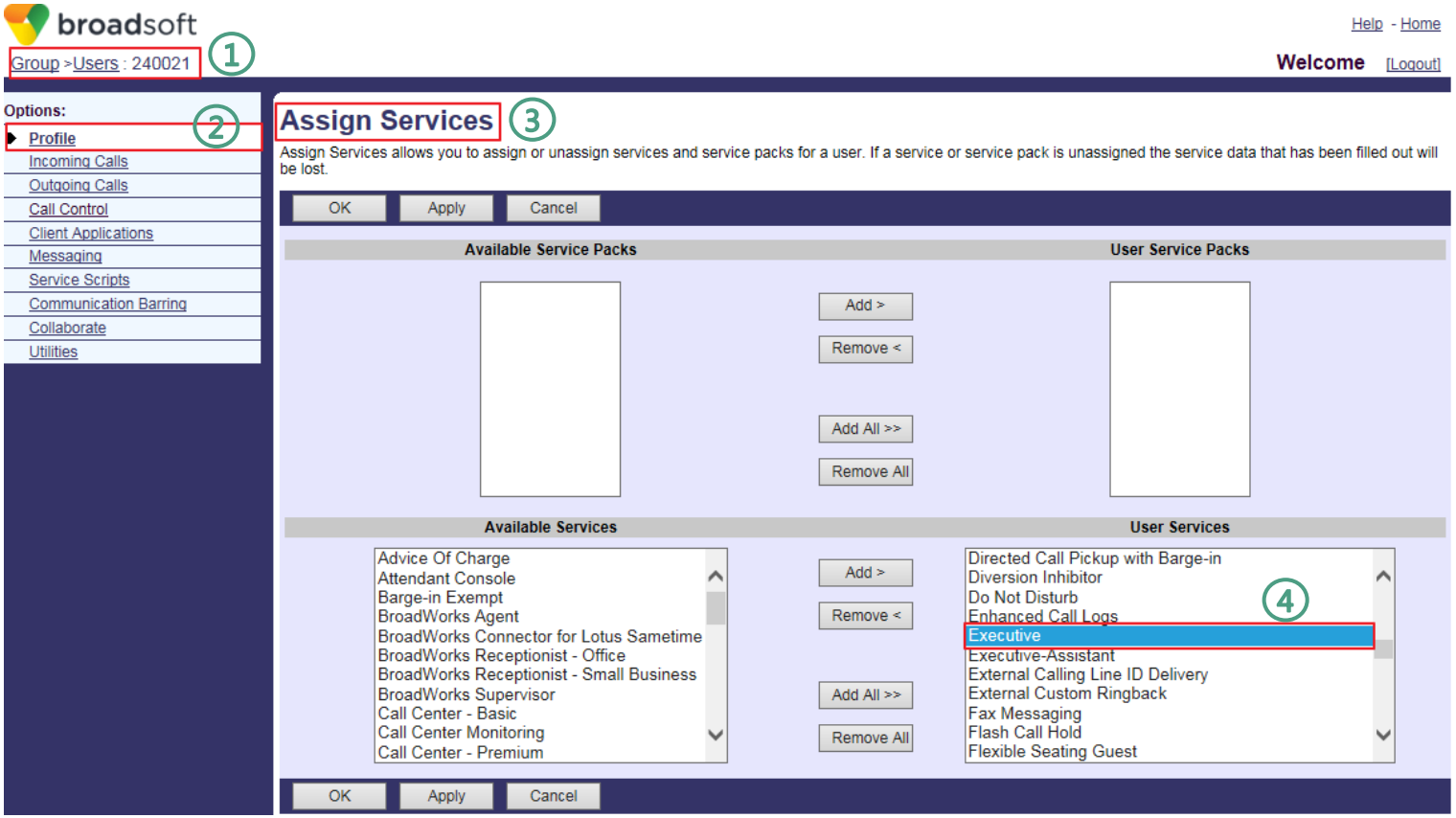
② Configuration on BroadWorks - Executive

1. Assign the Executive service to a user

Configuration Path: Group->Users->Search->select a user (240021)->Assign Services



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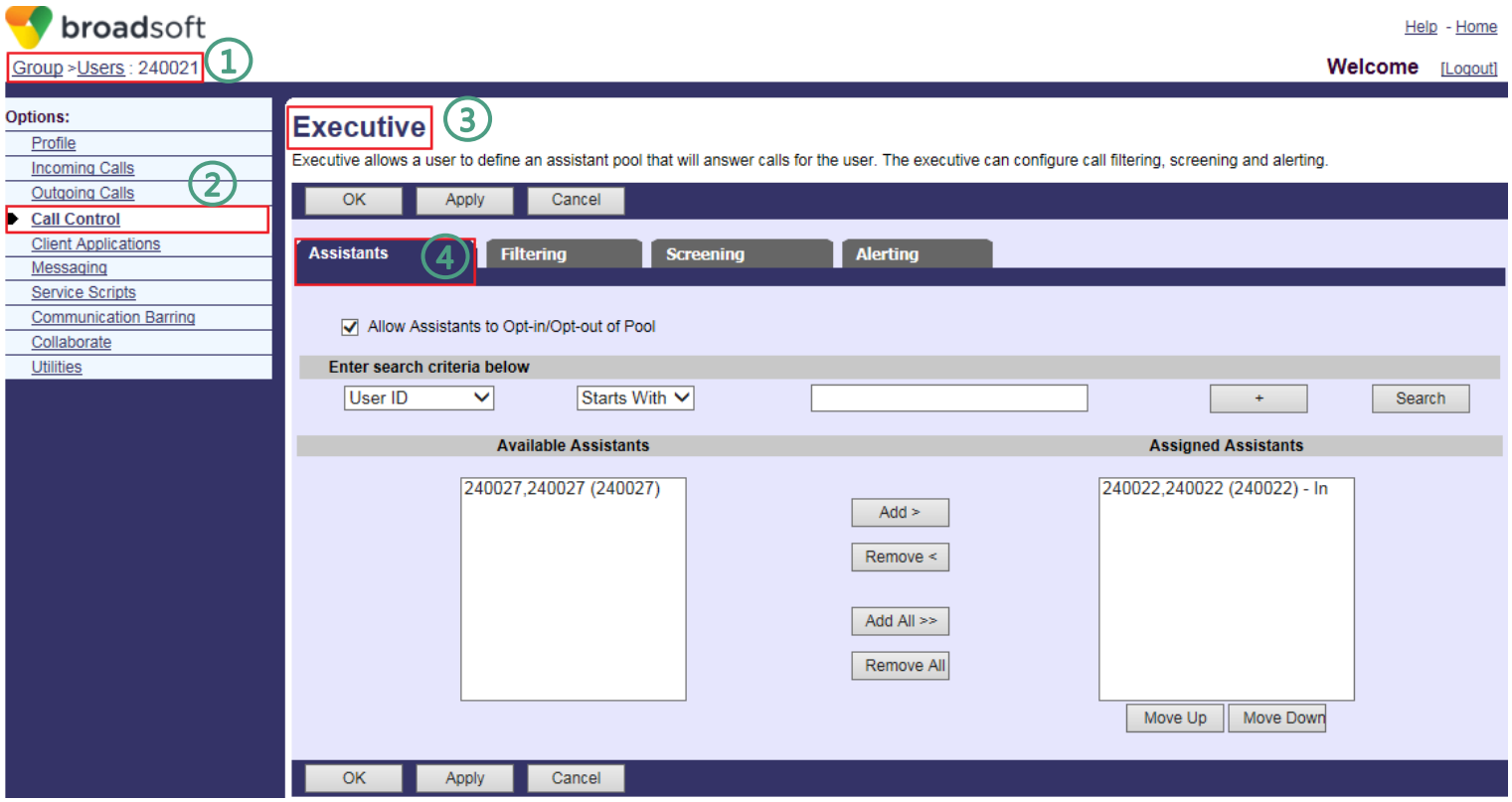
② Configuration on BroadWorks - Executive

2. Configure a list of assistant for an executive and assign the permission

Configuration Path: Group->Users->Search->select a user (240021)->Call Control->Executive->Assistants



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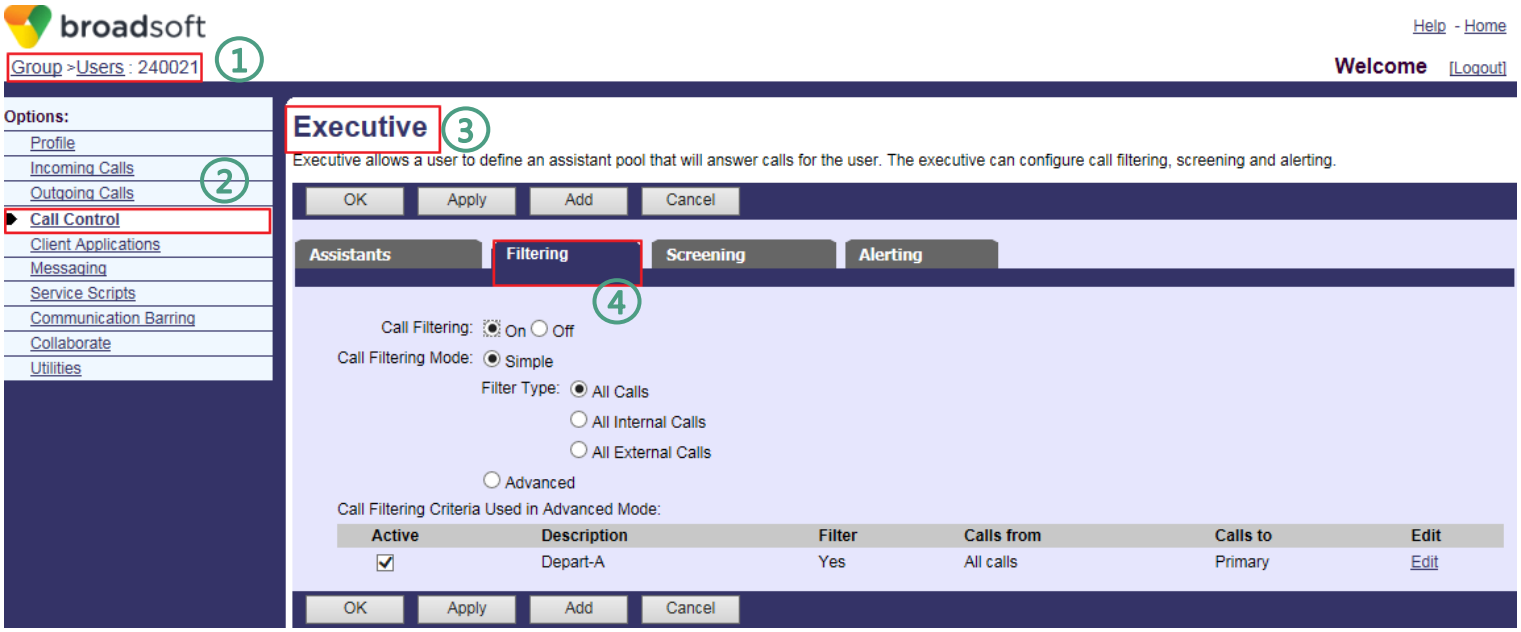
② Configuration on BroadWorks - Executive

3. Configure call filtering

Configuration Path: Group->Users->Search->select a user (240021)->Call Control->Executive->Filtering



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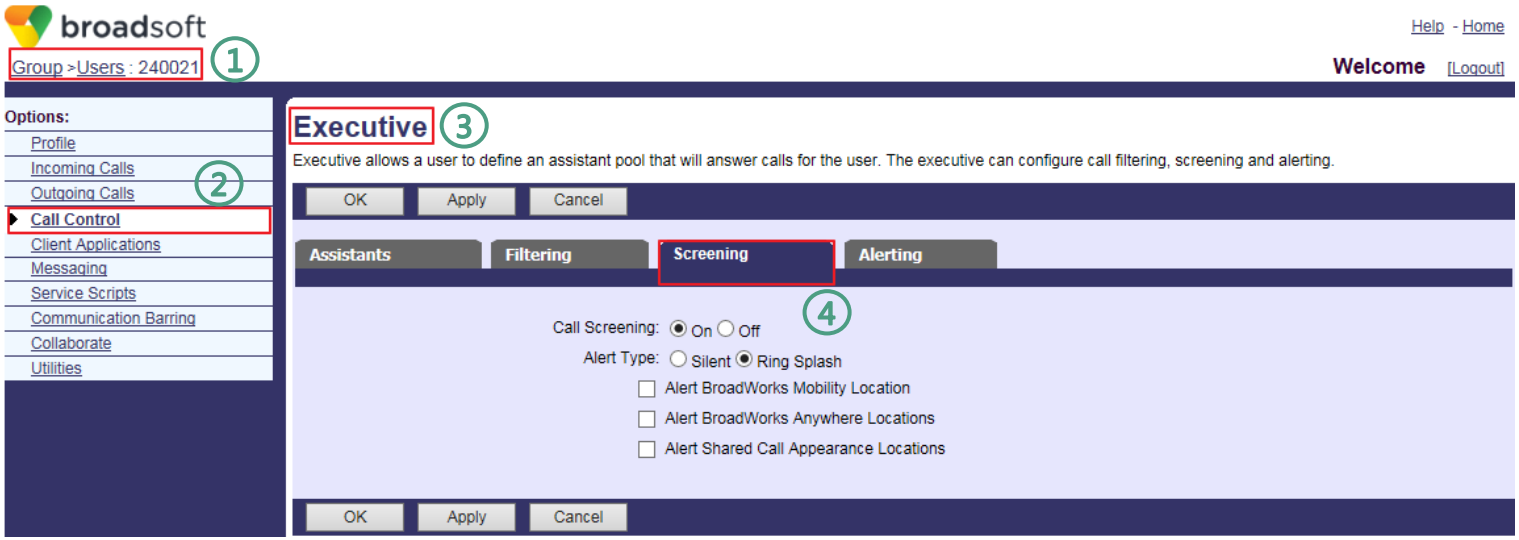
② Configuration on BroadWorks - Executive

4. Configure call screening

Configuration Path: Group->Users->Search->select a user (240021)->Call Control->Executive->Screening



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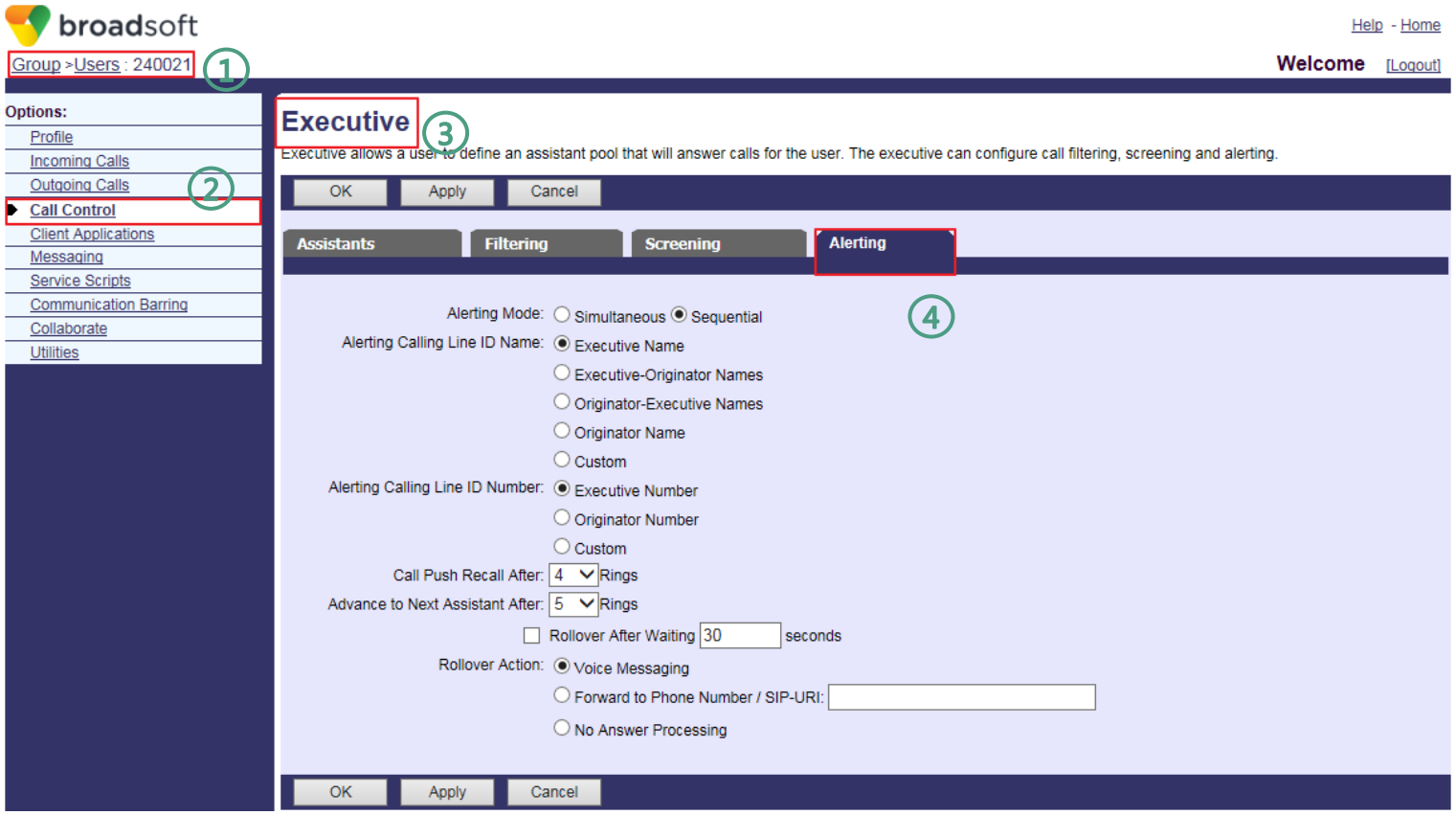
② Configuration on BroadWorks - Executive

5. Configure call alerting

Configuration Path: Group->Users->Search->select a user (240021)->Call Control->Executive->Alerting



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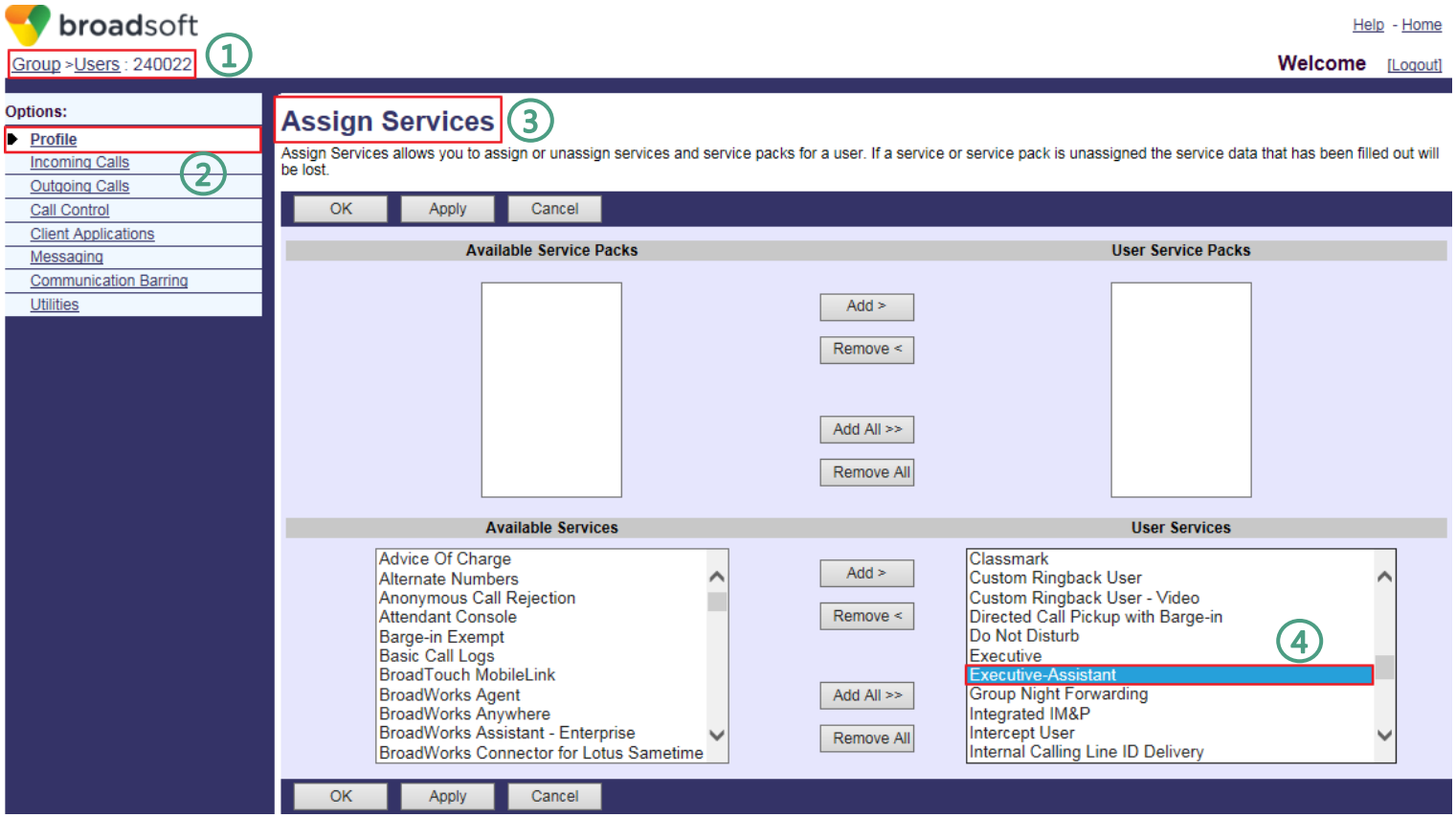
② Configuration on BroadWorks - Executive-Assistant

1. Assign the Executive-Assistant service to a user

Configuration Path: Group->Users->Search->select a user (240022)->Assign Services



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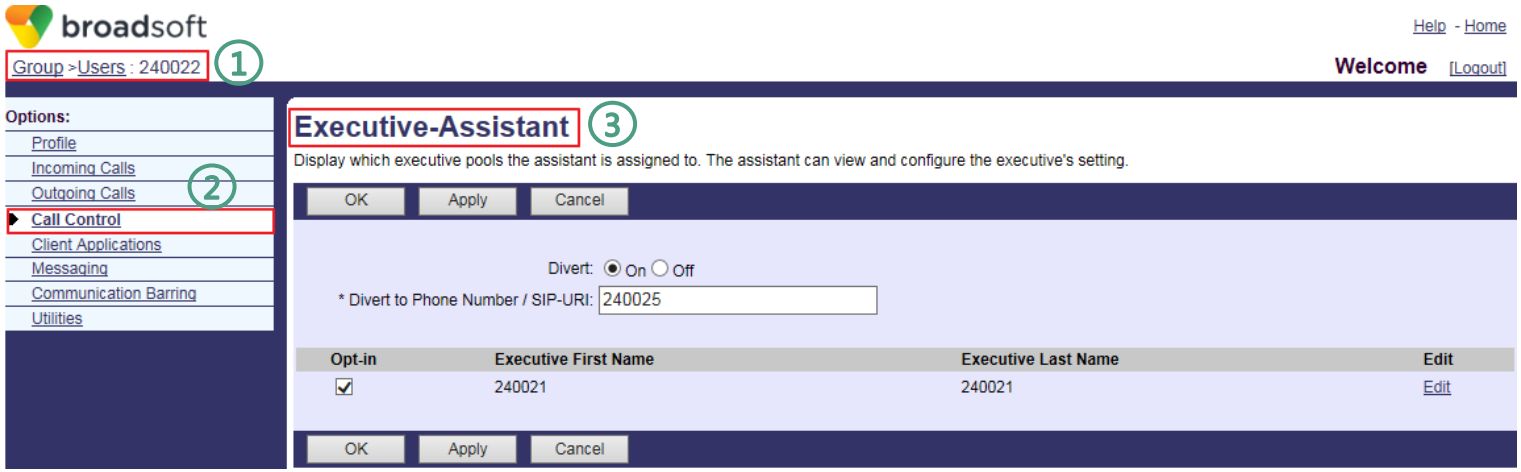
② Configuration on BroadWorks - Executive-Assistant

2. Configure executive- assistant feature

Configuration Path: Group->Users->Search->select a user (240022)->Call Control->Executive-Assistant



Note: Check the **Opt-in** checkbox before the desired executive name. The Opt-in checkbox is checked and non-editable when the executive does not allow assistant to opt-in or opt-out.

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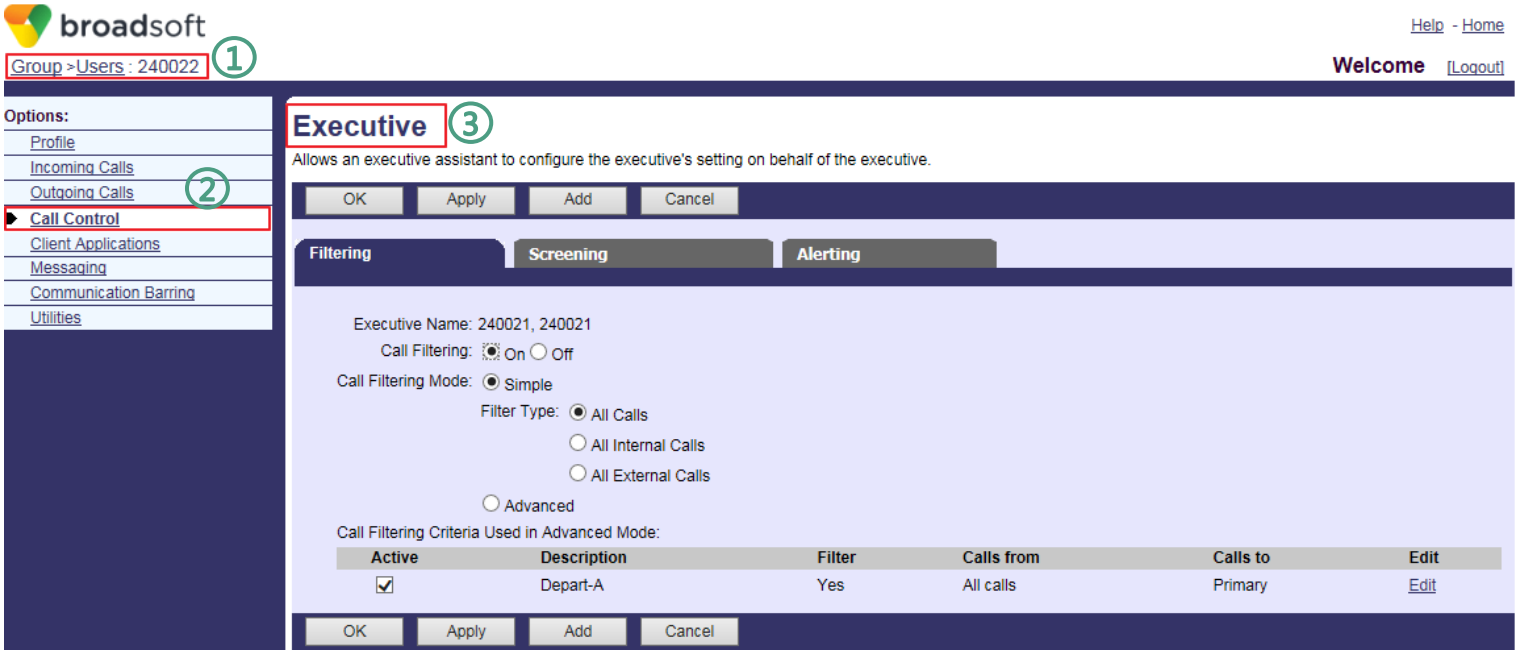
② Configuration on BroadWorks - Executive-Assistant

3. Change Executive settings by assigned assistant

Configuration Path: Group->Users->Search->select a user (240022)->Call Control->Executive-Assistant

1) Click on **Edit** behind the corresponding executive.
2) Click the desired tab to edit.



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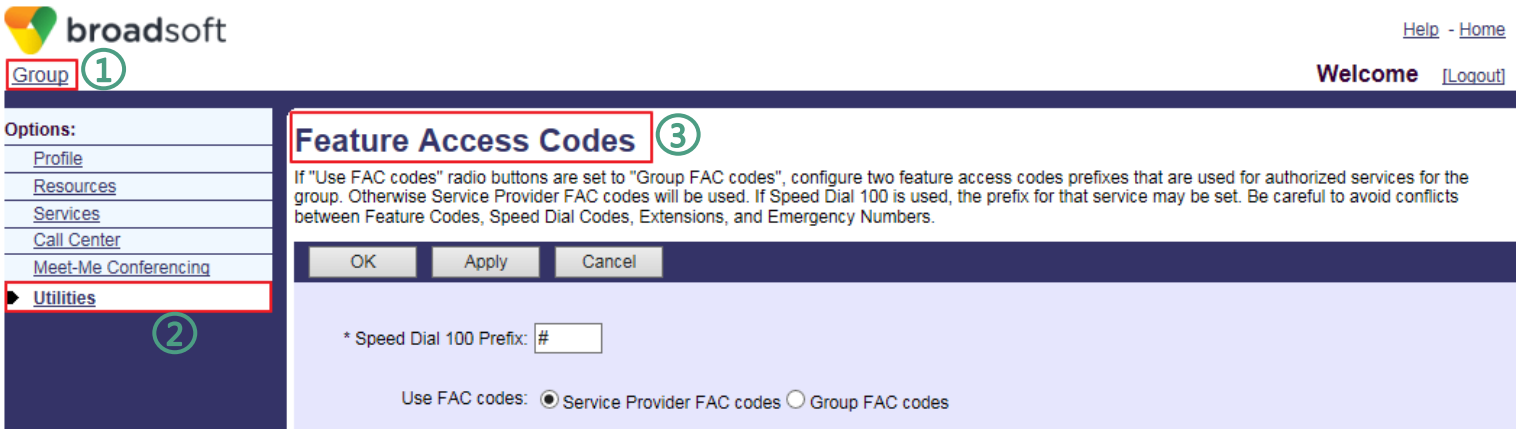
② Configuration on BroadWorks - FACs

4. Check the Bridge In & Retrieve code:

Configuration Path: Group->Utilities->Feature Access Codes



Enable	Feature Access Code Name	Main (Required)	Alternate (Optional)
✔	Advice Of Charge Activation	*34	
✔	Anonymous Call Rejection Activation	*77	
✔	Automatic Callback Menu Access	#9	
✔	BroadWorks Anywhere E.164 Dialing	*14	
✔	Call Bridge	*15	
✔	Call Forwarding Always Activation	*72	
✔	Call Recording - Start	*44	
✔	Call Recording - Stop	*45	
✔	Call Retrieve	*11	
✔	Call Return	*69	
✔	Call Return Number Deletion	#92#	

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③ Configuration on Yealink IP Phones

Ways to Configure Flexible Seating on IP Phones:

Access Portal	Availability	How to access?
Phone LCD portal	Available	
Web portal	Available	Log in by IP address: *Username/password are admin/admin by default
Auto Provisioning	Not Available	NA

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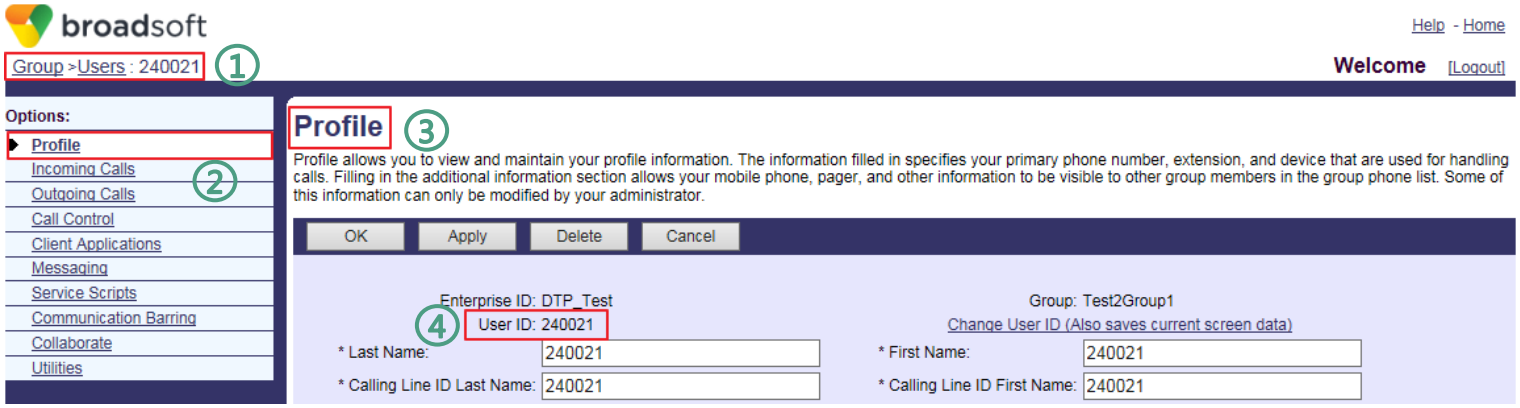
③ Configuration on Yealink IP Phones - XSI

Get the XSI information

1. Host Server: The Host Server is your BroadWorks Web Portal management address. For example: ylxsp.yealink.com

2. XSI User ID: The user ID is in the profile of the User ID. It should contain the whole SIP URI. For example: 240021@yealink.com



3. The Password is the BroadWorks Web Portal access password of each user.

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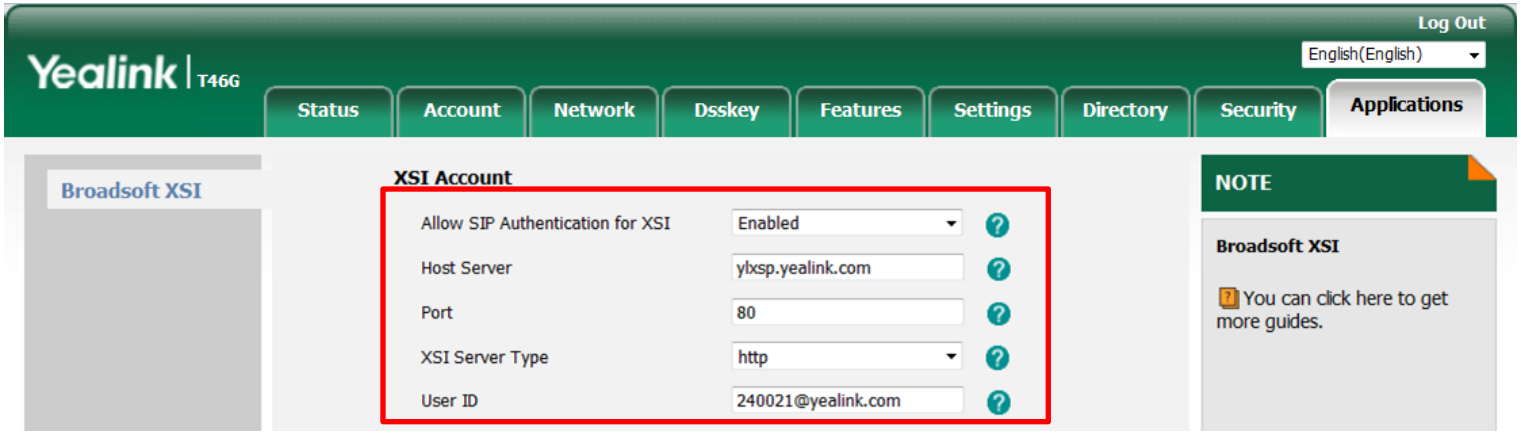
③ Configuration on Yealink IP Phones - XSI

Set the XSI information via phone web UI

Configuration Path: Applications->Broadsoft XSI



##Notice: All BroadSoft features will be displayed in phone Web UI after you enable this feature via Auto-Provisioning or you can't find it. This is very important.

##Enable the BroadSoft features. Require reboot.

##0-Disabled, 1-Enabled (default).

bw.xsi.enable = 1

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③ Configuration on Yealink IP Phones - XSI

Set the XSI information via Auto-Provisioning

```
##Notice: All BroadSoft features will be displayed in phone Web UI after
you enable this feature or you can't find it. This is very important.
##Enable the BroadSoft features. Require reboot.
##0-Disabled, 1-Enabled (default).
bw.xsi.enable  = 1

##Configuration of XSI, the XSI configuration is corresponding to the
first account  on the phone.
account.1.xsi.user = %BWLOGIN-ID-1%
account.1.auth_name = %BWAUTHUSER-X%
account.1.password = %BWAUTHPASSWORD-X%

##Configure the server host of XSI
account.1.xsi.host = %XSP_ADDRESS%

##Configure the type of server. Value: http (default), https.
account.1.xsi.server_type = https

##Configure the port of server. The default port is 80.
account.1.xsi.port =
```

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③ Configuration on Yealink IP Phones - Executive

1. Allow/disallow assigned assistant to opt in/out

Press Menu->Features->Call Control->Executive->Generally Settings

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③ Configuration on Yealink IP Phones - Executive

2. Configure call filtering

Press Menu->Features->Call Control->Executive->Call Filtering

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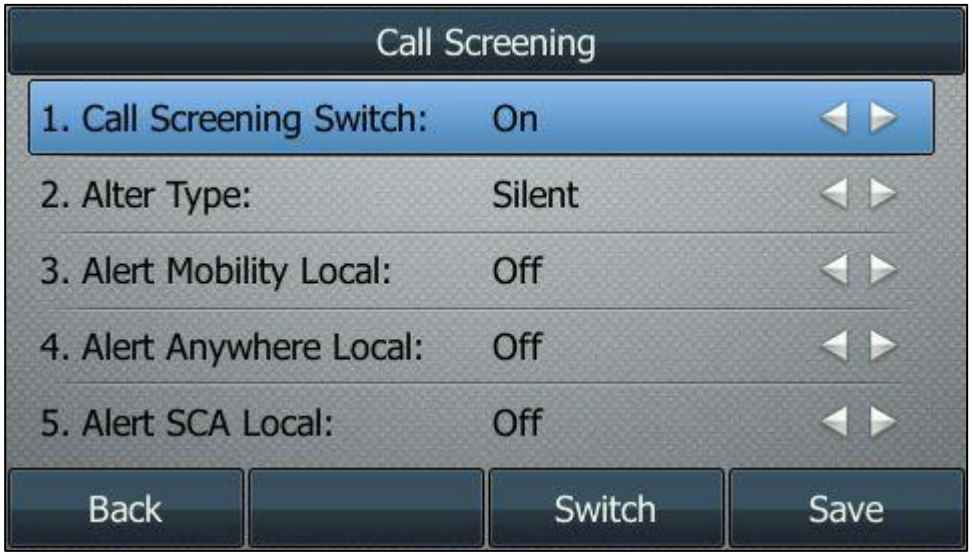
③ Configuration on Yealink IP Phones - Executive

3. Configure call screening

Press Menu->Features->Call Control->Executive->Call Screening



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③ Configuration on Yealink IP Phones - Executive

4. Configure call screening

Press Menu->Features->Call Control->Executive->Call Alerting

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③ Configuration on Yealink IP Phones - Executive

5. View the assign assistant list

Press Menu->Features->Call Control->Executive->View Assistant List

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③ Configuration on Yealink IP Phones - Executive-Assistant

1. Configure divert feature

Press Menu->Features->Call Control->Executive-Assistant->Generally Settings

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③ Configuration on Yealink IP Phones - Executive-Assistant

2. View the assign executive list and opt in or opt out for executive

Press Menu->Features->Call Control->Executive-Assistant->View Executive List

Note: The Opt-in/Opt-out is non-editable when the executive does not allow assistant to opt-in or opt-out.

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④ Feature Show - Handle Incoming Calls

1. Call to executive is filtered, but not screened

1. An executive receives a call. The executive is not alerted for the call.
2. The call is routed to the executive's opt-in assistants in a sequential or simultaneous according to the Executive service configuration.
3. The assistant answers or rejects the filtered call. Any other assistants are released and stop alerting.

2. Call to executive is filtered and screened

1. An executive receives a call. Both the executive and assistants are alerted for the call.
   > The assistant answers or rejects the filtered call. Executive and any other assistant and are released and stop alerting.
   > The Executive answers the screened call. Any other assistants and are released and stop alerting.
   > The Executive rejects the screened call. The other assistants keep ringing.

3. Call to executive is filtered, screened and triggers rollover action

1. An executive receives a call. Both the executive and assistants are alerted for the call.
2. Both the assistants and executive fail to answer the call.
3. The Rollover Action is triggered according to the Executive service configuration sending the call to voice mail, the forwarding location or no answer processing.
4. All assistants and executive are released and stop alerting.

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④ Feature Show - Call Bridge & Call Retrieve

Executive bridges into call connected to assistant

Dial the call bridge feature access code (default: *15).
The bridge warning tone is played according to the executive's configuration. The executive, assistant and remote party can hear each other on the bridge.

Executive retrieve a call connected to assistant

Dial the call retrieve feature access code (default: *11).
The conversation is established between executive and remote party, the assistant disconnects the call.

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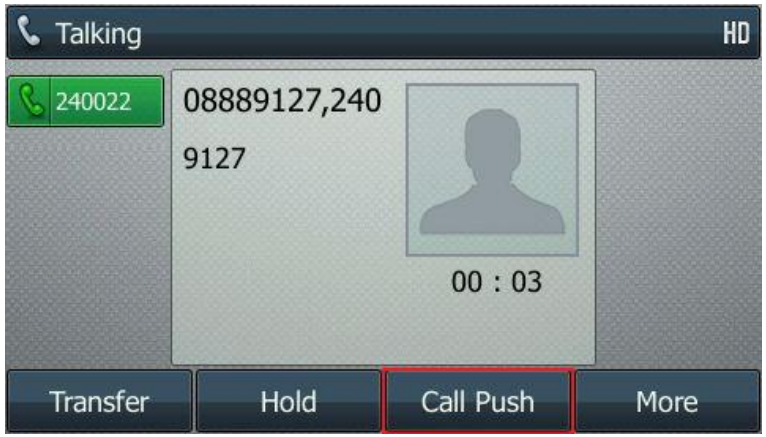
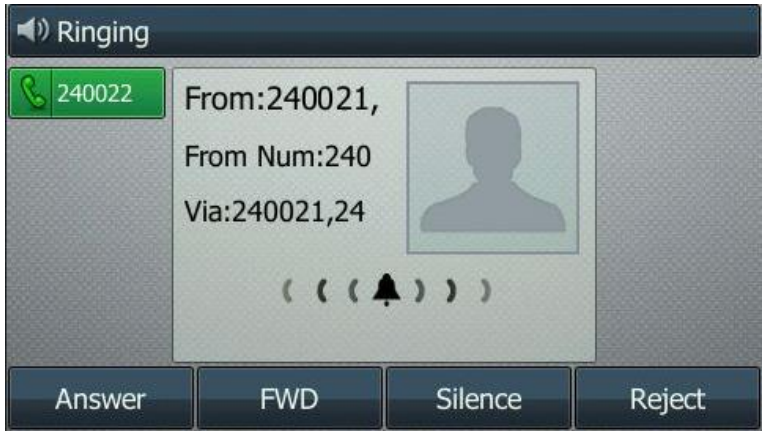
④ Feature Show - Call Push & Push Recall

Assistant push a call to Executive

Press **More**->**Call Push**.



The push call will be recall when executive fails to answer the call



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④ Feature Show - Call Initiation

The assistant initiates call on behalf of executive

1) Enter the desired number on the dialing screen.

2) Press **More->Call Initiation**.

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④ Feature Show - Silence Monitor Bridge

Silent Monitor Bridging provides the ability for the user to bridge in to a call in silent monitoring mode. The monitoring (invoking) user can hear the other parties, but the other parties cannot hear the monitoring user. Silent Monitor Bridging is available to all SCA Bridging capable users, but can only be invoked from the user's primary line.

1) Long press the line key when the phone is idle.

2) Press **Silent Monitor** soft key.

Note: To use the Silent Monitor Bridging feature, the Executive-Assistant service should be assigned to the shared account.

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Enjoy the Executive and Assistant feature.

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