

Assign Delegation Privileges

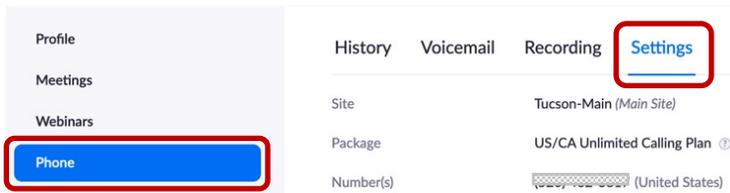
Step-By-Step Instructions

Call delegation, also known as shared line appearance, provides an easy way for phone users to assign others to handle calls on their behalf. **Shared lines** are direct phone numbers that belong to the delegator but can be used by their delegate. Both delegator and delegate must have a direct phone number or a calling plan.

As the delegator, you will initiate the process to send a delegation request to your delegate. This request does not initiate an email. A delegate must log into the Zoom web portal to accept the request.

Initiate a Delegation Request to a User

1. Sign into the Zoom web portal at **arizona.zoom.us**
2. Navigate to the **Phone Settings** tab.

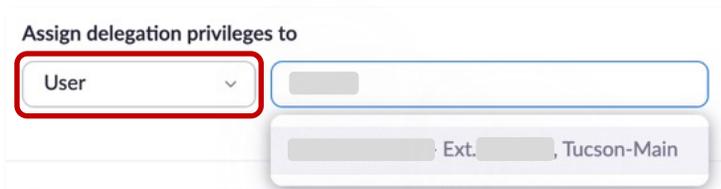


3. Scroll down to the **Delegation & Assistant** section.
4. Click the **Set** link next to **Assign delegation privileges to**.

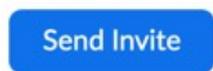


You can delegate your phone to a **User** or a **Common Area Phone**. Information on delegating to a Common Area Phone is covered at the end of this document.

5. To Assign delegation privileges to a User, make sure the delegation target is set to **User** then enter at least three digits of their name or extension in the text field to the right.
6. Select them from the list of possible matches.

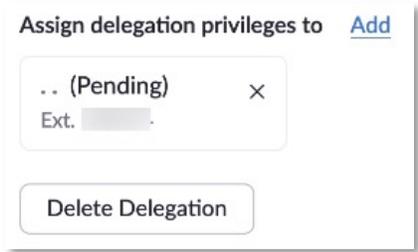


7. And click **Send Invite**.

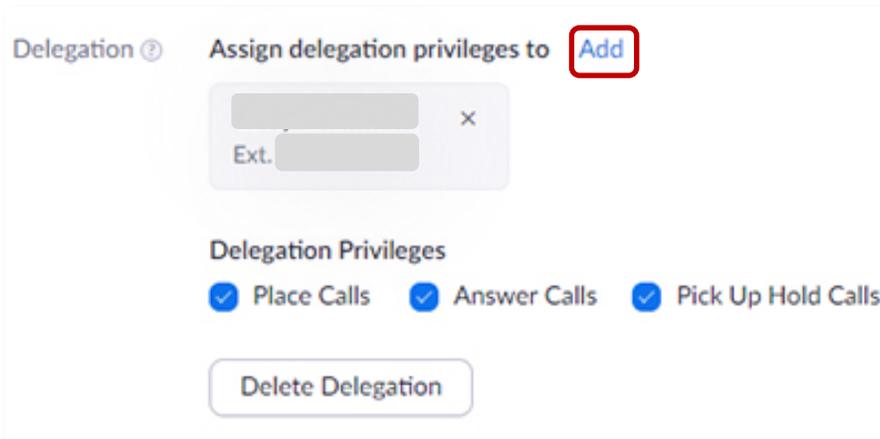


Sending a delegation request does not initiate an email. A delegate must log into the Zoom web portal to accept the request. You may want to give them a heads-up.

The request remains in a **Pending** status until the delegate logs into the Zoom web portal and accepts or denies the request.



8. Once your request has been accepted, the delegate appears in the **Delegation** section, and you are able to select or deselect the specific actions you wish to delegate to this person.
 - a. You can delegate the ability to **Place Calls or Answer Calls** on your behalf. When you delegate the ability to **Answer Calls**, your delegate will get the call notification for ALL incoming calls to your direct phone numbers.
 - b. You can also delegate the ability to **Pick Up Hold Calls** which makes it possible for you to transfer calls back and forth. Details on transferring calls on a shared line are covered in a separate document.



9. To add additional delegates, click **Add** and follow the same process to locate, select, and send another delegation invite.

Delegate to a Common Area Phone

Instead of delegating your phone to a **User**, you may wish to delegate to a **Common Area Phone**. For example, this option would be useful if your department reception area uses one phone operated by a pool of rotating employees.

Note: When you delegate to a **Common Area Phone**, a Zoom Phone admin needs to accept the delegation request.

Contact UITS-Telco@arizona.edu to establish, change, or remove telephone services or features. Contact the 24/7 Support Center (<http://247.arizona.edu>) for Zoom app issues or service outage. Start an on-line chat at <https://support.arizona.edu> or call 520-626-TECH (8324) or toll-free at 887-522-7929.