



# Cisco E-Mail Manager 5.0 Administrator's Quick Start Guide

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## 1 Important Terms

Following are some important terms you should know as you get started. Additional terms appear in the Glossary in the online books and help.

**Queue**  
A list of messages for a specific agent or skill group. From a queue, you manage and access messages.

**Skill Group**  
A collection of agents who work with messages assigned to the skill group's own queue.

**Agent**  
An agent is an individual user account that accesses Cisco E-Mail Manager through the Agent Desktop. Agents work with and respond to messages.

**Rules**  
An object that tests a message for certain criteria and performs an action on the message if it meets that criteria. Rules are grouped into rule trees and subroutines.

**Roles**  
The access privileges and settings associated with an agent.

## 2 Setting Up Your Browser

Before using E-Mail Manager, ensure that your browser is set up to:

- Always accept cookies
- Compare the document in cache to the document on the network once per session
- Enable JavaScript
- Enable StyleSheets

## Supported Browsers


You need to be using Microsoft Internet Explorer 5.5 with Service Pack 2 or Internet Explorer 6.0, with the Microsoft Java VM enabled.

## 3 Accessing the Admin Desktop

To access the Admin Desktop, go to the URL:  
`http://machine-name:port_number`

To Log in:

- Step1 Enter the required log in information.
- Step2 Click **Log in**.

 **Note** Username and Password are case-sensitive.

## 4 Managing Roles

Each agent or administrator is assigned to a role. Roles determine the privileges and settings an Agent or Administrator has. You can create or modify roles.

To create or modify roles:

- Step1 Click **Agent Management > Manage Roles**.
- Step2 See the Online Help for specific instructions on managing roles.

## 5 Managing Agents and Skill Groups

You can create and modify agents and skill groups if you are an administrator.

## Working with Peripherals

When working in an integrated instance, you must enable peripherals configured in ICM before associating agents with them.

To associate an agent to a peripheral:

- Step1 Click **Configuration > Advanced Settings > Peripherals**.
- Step2 See the Online Help for specific information on using peripherals.

To work with a Skill Group:

- Step1 You open the Skill Group screen by clicking **Agent Management > Manage Skill Groups**.
- Step2 See the Online Help for specific information on using this screen.

To work with an agent:

- Step1 Click the **Agent Management > Manage Agents**.
- Step2 See the Online Help for specific information on using this screen.

**Corporate Headquarters**  
Cisco Systems, Inc.  
170 West Tasman Drive  
San Jose, CA 95134-1706  
USA  
<http://www.cisco.com>  
Tel: 408 526-4000  
800 553-NETS (6387)  
Fax: 408 526-4100



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## Enabling Agents

When working with an integrated instance, you can enable agents created by other applications to work with E-Mail Manager.

To enable agents:

**Step1** Click **Agent Management > Enable Agents**.

**Step2** See the Online Help for specific instructions on enabling agents.

## 6 Personal Profile

You can review and modify your personal profile.

To access your personal profile:

**Step1** Click **Agent Management > Personal Profile**.

**Step2** For more information on personal profile settings, see the *Cisco E-Mail Manager Administration Guide* or the Online Help.



**Note** You can only update certain settings in your profile, depending on your role settings.

## 7 Working with Rules

You create rules to automatically route certain messages in Cisco E-Mail Manager.

There are three types of trees to attach rules to:

- **System Rules**- These rules check messages as they enter Cisco E-Mail Manager.
- **Overdue Rules**- These rules escalate messages that have been in the queue longer than the default or queue-specific Overdue Escalation Time.

- **Overload Rules**- These rules escalate messages that when the number of messages in the queue is greater than the default or queue-specific Overload Escalation Threshold.

To work with a rule:

**Step1** Click the Rule menu and select a rule tree to work with.

**Step2** See the Online Help or the for detailed information on working with rules.



**Tip** For more information about Rules, see the *Cisco E-Mail Manager Administration Guide*.

## 8 Working with Keywords

Keywords are associated with templates and used by rules.

To work with keywords:

**Step1** Click **Configuration > Keywords** and Libraries.

**Step2** See the Online Help for specific information concerning Keywords.

## 9 Working with Attachments

Attachments are files attached to an incoming message or response. Administators can register attachments to the system to allow agents to attach them to responses.

To register an attachment to Cisco E-Mail Manager:

**Step1** Click **Configuration > Attachments**.

**Step2** Use the Online Help for more information concerning Attachments.

## 10 Working with Categories

A category is a word or phrase that an agent or rule associates with a message. Categories are used by reports.

To create a category:

**Step1** Click **Configuration > Categories**.

**Step2** Name the category and select **Add Category**.

## 11 Creating Mailing Lists

A mailing list is a group of e-mail addresses under one list name. Mailing lists allow you to send a single e-mail to many addresses.

E-Mail Manager provides three types of mailing lists:

- **Personal**- Available to you.
- **Public**- Available to all E-Mail Manager users with access to them.
- **Opt Out**- A special list of addresses that is checked before an address is added to a broadcast list. Addresses on this mailing list are not added to the broadcast list.

To create or view a mailing list:

**Step1** Click **Mailing Lists >** and select a type of mailing list.

**Step2** See the Online Help for information on working with mailing lists.

## 12 Configuring Incoming Message Settings

You define how E-Mail Manager retrieves messages from POP3 Mailboxes.

To configure incoming message settings:

**Step1** Click **Configuration > Incoming Mail**.

**Step2** See the Online Help for information on configuring incoming message settings.



**Note** You may want to stop incoming mail when working with InBasket setting.

## 13 Logging Out

Use the **Logout** menu to exit E-Mail Manager.

To log out:

**Step1** Click the **Log Out** menu.

**Step2** Click **OK** for the dialog box that appears (or **Cancel** to abort the logout process).