



Cisco E-Mail Manager 5.0 Agent 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 user or group. From a queue, you manage and access messages.

Skill Group
A collection of users that work with messages assigned to its 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
Rules process messages as the enter E-Mail Manager. Rules route and perform other actions on e-mails.

Roles
The access privileges and settings associated with an agent.


Note Depending on your role settings, not all options may be available to you.

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 6.0, with the Microsoft Java VM enabled.

3 Access the Agent Desktop

To access the Agent Log In page for the multi-session admin desktop, go to the URL:
http://machine_name/instance/

To Log in:

- Step1** Enter the required log in information.
- Step2** Click **Log in**.
- Step3** Click **Yes** to accept any certificates that display.


Note Username and Password are case-sensitive.

4 Retrieving Messages

From a Status Screen

The Status screen displays your status, including:


- Total messages,
- New messages, and
- Overdue messages

For your personal queue and all skill group queues you belong to.

To retrieve messages

You can retrieve messages by:

- Clicking the name of your personal queue to access messages assigned to that queue.
- Clicking the name of any skill group queues to access messages assigned to that skill group queue.
- Clicking the **Open from All Queues** option to open the oldest message with the highest priority.


Note If more than one message has the same priority, then the oldest message opens.

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From a queue

A queue lists messages and message information, including:

- The e-mail address the message was sent from
- The message status
- The message subject
- The date and time the message was sent
- Links to the message history

To open a message from a queue:



Click the message symbol under the **Open** column next to the message.

5 Reading Messages

You read messages from the Message screen or a queue.

To read a message in a queue, click the arrow under the **From** column.

You access the Message screen when you open a message from a queue if your role requires that you view a message before responding to it. From the Message screen, you can open the Response screen to respond to the message.

6 Responding to Messages

You respond to a message from the Response screen.

To respond to a message:

- | | |
|-------|---|
| Step1 | Modify any response information (such as the To: and From e-mail address, priority) that is entered by default. |
| Step2 | Enter a response in the Response: field. |
| Step3 | Check the spelling of your response. |
| Step4 | Add any desired templates, categories or attachments to your response. |
| Step5 | Select an option to either send, save or archive your response. |

7 Searching for Messages

You can search Cisco E-Mail Manager for messages fitting certain criteria.

To search for a message:

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|-------|--|
| Step1 | Click Process Messages > Search . |
| Step2 | See the Online Help for instructions on conducting message searches. |

8 Changing Your Working Modes

If you are in push mode, E-Mail Manager pushes the highest priority message that you can work on to you. If no messages are available, you wait in the Wait screen until a message arrives.

You need to enter push mode to have messages pushed to them.

Use one of these three methods to enter push mode:

- Click the **Enter Push Mode** icon in the Status screen.
- Click **Process Messages > Ready for Push**.
- Click the **Not Ready** icon.

To exit push mode, select the **Ready** icon.

9 Changing States

Changing your state to working makes you unavailable to receive messages, but does not log you out of E-Mail Manager. You should enter the working state if you are taking a break, so that an administrator can track the time you are logged in but not working on messages.

To change your working state:

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|-------|--|
| Step1 | Click the Not Ready menu and select an option. |
| Step2 | The Not Ready screen opens. To exit the Not Ready screen, click the Working State icon. |

10 Working with Your Personal Profile

You can check and modify your personal profile. Settings include:

- signature
- time zone
- role
- name
- description
- locale
- e-mail alias



Tip See the Agent Online Help for more information.

11 Logging Out

When you want to exit E-Mail Manager, log out using the **Logout** icon.

To log out of E-Mail Manager:

- | | |
|-------|---|
| Step1 | Click the Logout icon, or click Logout from the menu. |
| Step2 | Select either On Vacation or Done for today . |