



How to Configure Manager Features

Both managers and assistants can modify manager preferences from the Manager Configuration window. Managers can access this window from a website; assistants can access it from the Assistant Console.

Your system Administrator has chosen your Cisco Unified CallManager Assistant configuration to operate in either a shared-line mode or a proxy-line mode. If your system administrator has configured Cisco Unified CallManager Assistant to operate in proxy-line mode, you will be able to assign a default assistant, configure a divert target, and create filter lists. If your system administrator has configured Cisco Unified CallManager Assistant to operate in shared-line mode, you will only be able to configure a divert target. In shared-line mode, you will not be able to assign a default assistant or set up filters to selectively filter calls to an assistant.

The initial default settings allow managers to use Cisco Unified CallManager Assistant without first configuring preferences.

To learn more, refer to the following topics:

- [Description of Shared-line Mode and Proxy-line Mode, page 1-1](#)
- [How to Access Manager Configuration, page 7-2](#)
- [How to Assign a Default Assistant to a Manager, page 7-3](#)
- [How to Configure the Divert Target for a Manager, page 7-4](#)
- [How to Create Filter Lists for a Manager, page 7-5](#)

How to Access Manager Configuration

Refer to one of the following topics:

- [For Managers—How to Access Manager Configuration, page 7-2](#)
- [For Assistants—How to Access Manager Configuration, page 7-3](#)

For Managers—How to Access Manager Configuration

Managers will access the Manager Configuration page using a website. You can obtain the URL from your system administrator.

Procedure

- Step 1** On a computer running Microsoft Windows 2000, open a Microsoft Internet Explorer (Microsoft IE) browser.
- The browser version must be 5.5 or higher.
- Step 2** Open the URL that was provided by your system administrator. The URL should look like this: `http://<ip-address>/ma/desktop/maLogin.jsp`
- A pop-up window will ask you if you want to install Cisco Unified CallManager Assistant software.
- Step 3** Click the **check box** to indicate agreement with the following text: “Always trust content from Cisco Systems Inc.” Then click **Yes**.
- The Login page appears.
- Step 4** Enter your user name and password (as provided by your system administrator) and click **Sign in**.
- The Manager Configuration window appears.
- Step 5** When you are ready to log out, close the browser window. If necessary, repeat Step 3.
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Related Topics

- [How to Assign a Default Assistant to a Manager, page 7-3](#)
- [How to Configure the Divert Target for a Manager, page 7-4](#)
- [How to Create Filter Lists for a Manager, page 7-5](#)

For Assistants—How to Access Manager Configuration

Assistants can access the Manager Configuration window from the Assistant Console.

To access the window for a particular manager, right-click anywhere in the row for that manager in the My Managers panel of the Assistant Console. Then choose **Configure** from the pop-up menu.

To access the window for all of your managers, choose **Manager > Configuration** from the menu bar. If necessary, choose the manager for whom you want to configure features from the Manager drop-down list.

Related Topics

- [How to Assign a Default Assistant to a Manager, page 7-3](#)
- [How to Configure the Divert Target for a Manager, page 7-4](#)
- [How to Create Filter Lists for a Manager, page 7-5](#)

How to Assign a Default Assistant to a Manager

You can identify one of a manager's configured assistants as the *default* assistant.

Whenever possible, Cisco Unified CallManager Assistant assigns the default assistant as the manager's active assistant. If the default assistant is not logged in, Cisco Unified CallManager Assistant will assign another assistant (if one is available) to serve as the active assistant. Once the default assistant logs in, Cisco Unified CallManager Assistant will switch assistants so that the default assistant is active and handling calls.

Procedure

- Step 1** From the Manager Configuration window, click the **Default Assistant** tab (if necessary) to display the Default Assistant Selection window.
- Step 2** Select the appropriate assistant from the assistant drop-down menu.
- Step 3** Save your changes.
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Related Topics

- [How to Access Manager Configuration, page 7-2](#)
- [How to Configure the Divert Target for a Manager, page 7-4](#)
- [How to Create Filter Lists for a Manager, page 7-5](#)

How to Configure the Divert Target for a Manager

Managers using Cisco Unified CallManager Assistant in proxy-line mode can use the Divert All (DivAll) and Immediate Divert (ImmDiv) features to send calls to the assistant or to another phone number (known as a *target*). The DivAll feature and the ImmDiv feature share the same Divert target.

Managers using Cisco Unified CallManager Assistant in shared-line mode can set up a Divert target and forward calls as the calls come in by using the **ImmDiv** softkey. The divert screen automatically displays when you log in.

By initial default, the Divert target is the manager's active assistant. Managers and assistants can use the procedure below to change this target.

Procedure

- Step 1** From the Manager Configuration window, click the **Divert** tab to display the Divert Configuration window.
- Step 2** (Proxy-line mode only) Select **Directory Number** or **Assistant**.

Step 3 If you selected Directory Number, enter a valid phone number. Enter the number exactly as you would dial it from your office phone.

Step 4 Save your changes.

Related Topics

- [How to Intercept, Divert, and Transfer Calls, page 6-8](#)
- [How to Access Manager Configuration, page 7-2](#)
- [How to Assign a Default Assistant to a Manager, page 7-3](#)
- [How to Create Filter Lists for a Manager, page 7-5](#)

How to Create Filter Lists for a Manager

Filter lists allow managers or assistants to customize the manager's call filtering feature.

By default, filter lists are empty. Add numbers to a filter list to customize it. Choose a filter mode to toggle between *Inclusive* or *Exclusive* filter lists:

- **Inclusive**—Calls that match the numbers in the Inclusive filter list are sent to the *manager*; the remainder are redirected to the active assistant.
- **Exclusive**—Calls that match the numbers in the Exclusive filter list are redirected to the *assistant*; the remainder are sent to the manager.

Cisco Unified CallManager Assistant compares the caller ID of the incoming call to the phone number(s) in the active filter list.

For example, if you choose if you add the phone number 54321 to a manager's Inclusive filter list, every incoming call placed to the manager's office phone from 54321 will be routed to the manager (not to the assistant) if Inclusive filtering is on.

Or, if you add the number 54xxx to a manager's Exclusive filter list, every incoming call from a phone line with a five digit number that begins with 54 will be routed to the assistant (and not to the manager) if Exclusive filtering is on.

**Note**

Only one filter mode (Inclusive or Exclusive) can be active at any given time. Managers can toggle between filter modes from the Cisco Unified CallManager Assistant menu on their phones. Assistants can toggle between filter modes for a manager from the Assistant Console.

Filter lists can include the following wildcards:

- **x**—Use **x** to replace a *single* digit anywhere in the filter. For example, “123**x**5” represents five-digit phone numbers, where the fourth digit is 0 - 9. You can use an upper-case or lower-case **x**.
- *****—Use ***** to replace *multiple* digits at the beginning or end of the filter. For example, “5*****” represents phone numbers of any length that begin with 5.

Besides wildcards, filter lists can contain hyphens (-), periods (.), and blank spaces.

**Tip**

Filter lists can be empty. By initial default, the filter is enabled and the Inclusive filter list is empty. This means that all of a manager’s incoming calls are redirected to the assistant.

Managers—Activate your filter lists from your phone. To do so, open the Cisco Unified CallManager Assistant menu on your phone. Press **1** to toggle the Filter feature on and off; press **2** to toggle between Inclusive and Exclusive filter modes.

Managers and assistants can use the following procedure to create filter lists.

Procedure

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- Step 1** From the Manager Configuration window, click the **Inclusive** tab or the **Exclusive** tab to display the appropriate configuration window.
- Step 2** Enter a partial or complete phone number in the **Filter** field.
If you need help, click the **More Info** link to see example filters.
- Step 3** You can add, replace or delete filters:
- To add a new filter, enter a filter in the Filter field and click **add**.
The new filter will appear in the Filter List.

- To replace an existing filter with a new one, select the existing filter that you want to modify in the Filter List. Change the filter as needed in the Filter field and click **replace**.

The modified filter will appear in the Filter List.

- To delete a filter, select the filter in the Filter List and click **delete**.

The deleted filter will be removed from the Filter List.

Step 4 Save your changes.

Tips

- If you have both call filtering and Divert All (DivAll) enabled, Cisco Unified CallManager Assistant first applies *call filtering* to an incoming call. Call filtering directs the call to you or to your assistant (depending on filter settings.) Next, Cisco Unified CallManager Assistant applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.
- A circle icon in the Cisco Unified CallManager Assistant status window indicates whether the call filtering feature is on or off. A mesh-filled circle icon indicates on; a hollow circle indicates off.

Related Topics

- [How to Use Call Filtering, page 6-12](#)
- [How to Access Manager Configuration, page 7-2](#)
- [How to Assign a Default Assistant to a Manager, page 7-3](#)
- [How to Configure the Divert Target for a Manager, page 7-4](#)

