Configuring Manager Features

Managers and assistants can modify manager preferences from the Manager Configuration window:

- Managers can access the window from a website.
- Assistants can access the window from the Assistant Console.

Your system Administrator configured your Manager Assistant to operate in the shared-line or proxy-line mode. For more information, see Overview of Shared-Line and Proxy-Line Modes, page 2.

The initial default settings enable managers to use the Manager Assistant without configuring preferences first.

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For Managers—Accessing the Manager Configuration

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

Step 1 On a computer running Microsoft Windows 2000 or later, open a Microsoft Internet Explorer (IE) browser. The browser version must be 5.5 or higher.

Step 2 Open the URL that your system administrator provided. The URL should look like this: http://<ip-address>/ma/desktop/maLogin.jsp

A pop-up window prompts to ask if you want to install the Manager Assistant software.

Step 3 Click the check box to indicate that you agree with this 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.

For Assistants—Accessing 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 and 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 menu.

Assigning a Default Assistant to a Manager

Use this procedure to identify one of a manager's configured assistants as the default assistant.

When possible, the Manager Assistant assigns the default assistant as the manager's active assistant. If the default assistant is not logged in, the Manager Assistant assigns another available assistant to serve as the active assistant. After the default assistant logs in, the Manager Assistant switches assistants so that the default assistant is active and handling calls.

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 and save the change.

Configuring the Divert Target for a Manager

Managers can use configure a Divert target in these ways:

- Proxy-line mode—Managers using the Manager Assistant can use the Divert All (DivAll) and Redirect (Redirect) features to send calls to the assistant or to another phone number (also known as the target). The DivAll feature and the Redirect feature share the same Divert target.
- Shared-line mode—Managers using the Manager Assistant in the shared-line mode can set up a Divert target and forward calls as the calls come in by using the **Redirect** softkey. The divert screen displays automatically when you log in.

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

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 and save the change.

Creating Filter Lists for a Manager

Filter lists enable 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. For the list descriptions, see Table 2 page 11.

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

The Manager Assistant compares the caller ID of the incoming call to the phone number(s) in the active filter list.

- If Inclusive filtering is on—As an example, 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 is routed to the manager (not to the assistant).
- If Exclusive filtering is on—If you add the number 54xxx to a manager's Exclusive filter list, every incoming call from a phone line with a 5-digit number that begins with 54 is routed to the assistant (and not to the manager).

Filter lists can include these wildcards:

- x—Use x to replace a single digit anywhere in the filter. For example, "123x5" represents 5-digit phone numbers, where the fourth digit is 0 to 9. You can use an uppercase or lowercase 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.

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—You can activate your filter lists from your phone. Open the Manager 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.

If you have both call filtering and Divert All (DivAll) enabled, the Manager 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, the Manager Assistant applies DivAll to those calls that filtering has directed to you. The DivAll feature redirects those calls to the DivAll target.

For the call-filtering icons in the Manager Assistant status window, see Table 10 page 41.

Procedure

Step 1 From the Manager Configuration window, click the **Inclusive** or the **Exclusive** tab to display the appropriate configuration window.

Step 2 In the Filter field, enter a partial or complete phone number.

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 appears 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 in the Filter field and click **replace**. The modified filter appears in the Filter List.
- To delete a filter, select the filter in the Filter List and click **delete**. The deleted filter is removed from the Filter List.

Step 4 Save your changes.