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Director - Secretary configuration

 This document explains how to set up a Boss / Secretary configuration. This scenario is especially useful for big enterprises and public administration with complicated hierarchy. For smaller companies, consider configuring a [Director-Secretary Switch](#)

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Configuration scenario

- Boss should always be able to receive calls from the secretaries
- Boss should always be able to receive calls from other bosses
- Boss can decide whether or not to accept calls
- Secretaries should be notified when the boss is receiving an incoming call

Configuration

Step 1. Add secretaries to whitelist so that they can always reach the boss

Edit the procedure used for placing calls (users by default):

- Add the boss's extension (118 in our example) as *Called number*, and, using custom applications, add secretaries extensions to whitelist (1338 and 1339 in our example):
 - Called number - 118 (boss)
 - Custom application - `GotIf("${CALLERID(num)}" = "1338")?whitelist${EXTEN},1` - adds the secretary's extension (1338) to whitelist
 - Custom application - `GotIf("${CALLERID(num)}" = "1339")?whitelist${EXTEN},1` - adds the secretary's extension (1339) to whitelist
 - Dial the phone - **Set** (called number) - select *Remove* instead of *Custom*

118

- Custom application | GotoIf(\${\$CALLERID(num)} = "1338"?whitelist\$(EXTEN),1)
- Custom application | GotoIf(\${\$CALLERID(num)} = "1399"?whitelist\$(EXTEN),1)
- Dial the phone | Number (called number) | Set | Timeout | Options | Set | Message for operator

[Add application](#)

- To the same procedure, add a rule allowing the extensions, which are present in the whitelist, to dial the boss:
 - called number - whitelistXXX
 - Set - Type of call - whitelist
 - Dial the phone - **Set** (called number) - select *Remove* - 9 (called number whitelistXXX becomes XXX)

whitelistXXX

- Set | Type of call | whitelist
- Dial the phone | Number (called number-9) | Set | Timeout | Options | Set | Message for operator

[Add application](#)

Step 2. Create a dedicated Diaplan for other bosses so that they can always reach the boss

Create a new procedures, e.g. *users_bosses* and add a rule which adds bosses to whitelist:

- called number - X.
- Set - Type of call - whitelist
- Jump to - *Procedure* (users) - **Set** (called number) - select *Remove* instead of *Custom*

X.

- Set | Type of call | whitelist
- Jump to | Procedure: users (Internal dial) | Number (called number) | Set

[Add application](#)

Assign this procedure to bosses in WMS *Users Edit* (user) *Dialplan*

Step 3. Edit Call features of the boss to reject all calls except for the whitelist

You can do this configuration either in *Collaboration Settings Features* or in WMS *Users Edit preferences Features* for the boss's extension (118 in our example):

- Edit "Internal" call class: enable "Call Forward All" - 593, where 59 is Feature code for Call group, 3 is the Call group where the secretaries are present (1338, 1339)

Note: when the boss would like to start accepting calls from everyone, it's sufficient to disable "Call Forward All"

Personal

Features

Function keys

Fax Server

Chat / Presence

Contact center

Web Phone

Extensions

internal external blacklist whitelist

Activate class Do not disturb away

Call reject

Call Forward Busy VOICEMAIL

Call Forward No Answer VOICEMAIL

Call Forward All 593 VOICEMAIL

Call waiting

Call timeout 55

Enable mobility with timeout 4 10 10

Mobility confirmation

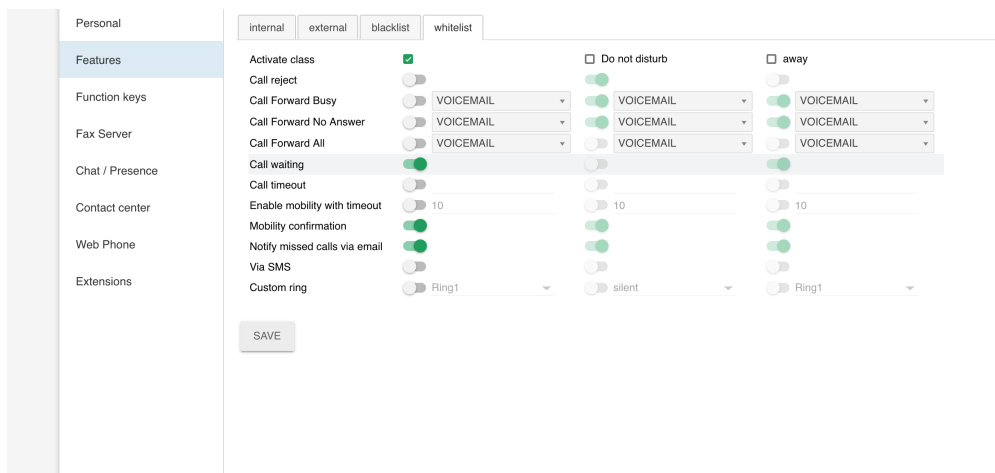
Notify missed calls via email

Via SMS

Custom ring Ring1 silent Ring1

[SAVE](#)

- Edit "Whitelist" call class: Activate class



Step 4. Add BLF keys for the secretaries to monitor the calls of the boss

You can do this configuration either in Collaboration *Settings Function keys* or in WMS *Users Edit preferences Settings* for the secretaries' extensions (1338, 1339 in our example):

- Add "Colleague" Function key - 118 (boss) and options 0 1 0 which enables "audio notification" allowing the secretary to receive an audio notification each time the boss is receiving an incoming call.

Function keys

[Colleague](#), [Park Location](#), [Speed Dial](#), [Trunk](#), [Line](#), [DTMF](#), [Empty Key](#), [Timetable](#), [Switch](#), [3 state switch](#), [Contact center](#), [Group pick up](#), [Call group](#)



⚠ Note: It is possible to set a ringtone to be played instead of a beep for BLF keys audio notification in WMS 4.01. Consult [Provisioning Custom Settings](#) for details.