

System Administration

Setup Worksheets

Use these worksheets to record your decisions about how to set up Unity. Photocopy the worksheets, and save the originals for future use. You can also print copies of the worksheets from PDF files found on the Unity compact disc. Each worksheet includes references to the specific Unity Administrator page where settings will be entered, and to the Unity System Administration Guide, where more information is provided.

unityTM
VERSION 2.4

WORKSHEET 1: SCHEDULE

What are the hours of your organization?

Do you have a call center that runs 24 hours a day?

Are there groups that keep a different schedule than the organization at large (for example, Technical Support)?

Are there groups that need different greetings at different times?

What holidays does your organization observe?

WORKSHEET 2: CLASS OF SERVICE

Class of service categories define rights and permissions for subscribers as well as assign licensed features (such as Text-to-Speech E-mail and FaxMail). Typically, organizations have at least two class of service categories: default subscriber and default administrator. You can define as many classes as you need.

How many subscribers need administrator access to Unity?

If you are using more than one administrator, what categories of access are needed by each administrator? Choose from the following:

- Create, edit, or delete call handlers
- Create, edit, or delete class of service objects
- Access diagnostics
- Access reports
- Create, edit, or delete restriction tables
- Create, edit, or delete routing tables
- Create, edit, or delete schedules and holidays
- Access status monitor
- Create, edit, or delete subscribers
- Access technician functions (configuration, licensing, ports and switch pages)
- Create, edit, or delete public distribution lists

Define and list the various groups or departments that exist within your organization.

Which of your organization's groups need access to specific licensed features, including the following?

- ViewMail for Outlook
- ActiveAssistant
- Text-to-Speech E-mail (TTS)
- FaxMail

Do any of your organization's groups need to be able to change call screening or call holding options?

Do you wish to restrict any of your organization's groups from dialing long-distance phone numbers when using message notification, sending outgoing faxes, or transferring calls?

WORKSHEET 3: SUBSCRIBER TEMPLATE

Define and list the various groups or departments that exist within your organization. (You can use the same groups that were defined for class of service. Subscriber template categories tend to parallel most major class of service categories.)

Do you have subscribers who are off-site (such as outside sales staff)? If yes, how many? Where are they located?

Which schedule will you assign to each group?

Which class of service will you assign to each group?

What password policies would you like to apply to each group?

Conversation page and Call Transfer page options: Many of the options on these pages define parameters that depend on individual preferences. Subscribers who have access to the ActiveAssistant can change conversation preferences as needed.

Do your defined subscriber groups need access to full conversation menus (on the phone interface) in Unity, or are brief conversation menus enough?

Do all of your organization's groups transfer to the same operator? Or do you have groups in your organization that use a separate, group-specific operator?

Caller Input page: Assign one-key dialing options as appropriate for specific groups of subscribers.

Messages page: Do you wish to use message waiting indicators (MWIs) for message notification? Check port allocation to make sure that a port has been assigned to this purpose.

WORKSHEET 4: CALL HANDLER

For detailed information on creating call handlers, refer to "Creating a call management plan" on page 307 in the *Unity System Administration Guide*.

WORKSHEET 5: CALL ROUTING

Do you have calls coming in on a specific line that you want to route to a specific call handler?

You may have other call routing needs that depend on your integration. It is essential to understand your integration, including the call packet information available to your organization. Talk with your installer. For more information, see "Call routing tables" on page 347 of the *Unity System Administration Guide*.

WORKSHEET 3: SUBSCRIBER TEMPLATE worksheet page 1 of 5

Profile page

Name: _____

New subscribers

Class of service: []

Active schedule: []

Display name generation:

First name then last name (Jessica Smith)

Last name then first name (Smith, Jessica)

Set subscriber for self-enrollment at next login

List in phone directory

New NT and Exchange users

Exchange alias generation:

None

First letter of first name + last name (JSmith)

First name + first letter of last name (JessicaS)

First name + last name (JessicaSmith)

Account page

Account status: Locked

Billing ID (optional): _____

Location: []

Passwords page

Phone password settings:

User cannot change password

User must change password at next login

Password never expires

Phone password for new subscribers: _____

NT password settings:

Password for new NT accounts: _____

Conversation page

Conversation options

Greet subscriber by name

Conversation type:

Full menus

Brief menus

Subscriber's language: []

Sending Messages

Address messages to other subscribers:

By first name first

By last name first

By extension

Retrieving Messages

Announce total number of new messages

Announce total number of saved messages

Announce total number of new voice messages

Announce total number of new fax messages

Announce total number of new e-mail messages

Listening to a Message

Announce sender

Say message number

Announce timestamp before messages

Announce timestamp after message

Volume level

Quietest

Medium (default)

Loudest

SEE ALSO

Unity Administration: Subscribers > Subscriber Template System Administration Guide

INSTRUCTIONS

Use this worksheet to record your decisions about how to set up a subscriber template. Make a photocopy of the worksheet for each subscriber template, and save the original for future use.

SIGNATURE _____ DATE _____

WORKSHEET 4: CALL HANDLER worksheet page 1 of 4

Profile page

Name: _____

Created: _____

Owner: _____

Owner type:

Subscriber

Public distribution list

Recorded voice: []

Active schedule: []

Extension (optional): _____

Language: []

Call Transfer page

Transfer Rule applies to: []

Alternate: []

Alternate

Status:

Enabled

Disabled

Transfer incoming calls?

No (send directly to this handler's greeting)

Yes, ring message recipient's extension

Yes, ring a subscriber at this extension

Transfer type:

Transfer to switch

Supervise transfer

Ring to wait for: []

If the call is busy:

Always hold

No holding

Ask caller

Gather caller information:

Announce

Introduce (Call for name)

Confirm (call can be accepted or refused)

SEE ALSO

Unity Administration: Call Management > Call Handlers System Administration Guide

INSTRUCTIONS

Use this worksheet to record your decisions about how to set up a call handler. Make a photocopy of the worksheet for each call handler, and save the original for future use.

SIGNATURE _____ DATE _____

WORKSHEET 5: CALL ROUTING worksheet page 1 of 1

Direct calls page

Routing Table: Direct Calls

Rule	Status	Call Type	Port	Trunk	Dialed Number	Calling Number	Schedule	Send call to
Low Record	On	Both	Any	Any	Any	Any	Always	Start the record
Attempt Sign in	On	Both	Any	Any	Any	Any	Always	Attempt Sign in
Default Call Handler	On	Both	Any	Any	Any	Any	Always	Attempt transfer for Opening Greeting

Forwarded calls page

Routing Table: Forwarded Calls

Rule	Status	Call Type	Forwarding Station	Dialed Number	Calling Number	Schedule	Send call to
Attempt Extension to Station	On	Both	Any	Any	Any	Always	Attempt Forward
Default Call Handler	On	Both	Any	Any	Any	Always	Attempt transfer for Opening Greeting

SEE ALSO

Unity Administration: Call Management > Call Routing System Administration Guide

INSTRUCTIONS

Use this worksheet to record your decisions about how to set up call routing tables. Photocopy the worksheet, and save the original for future use.

SIGNATURE _____ DATE _____

WORKSHEET 1: SCHEDULE

Name of schedule _____

Schedule Settings page

Observe holidays [Change default schedule](#)

Edit schedule:

Click individual blocks to set hours: = Closed = Open

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
12 AM							
1 AM							
2 AM							
3 AM							
4 AM							
5 AM							
6 AM							
7 AM							
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							
1 PM							
2 PM							
3 PM							
4 PM							
5 PM							
6 PM							
7 PM							
8 PM							
9 PM							
10 PM							
11 PM							
	Sun	Mon	Tue	Wed	Thu	Fri	Sat

Copy day's schedule: >> Copy day's schedule:

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
All Weekdays
Weekend

SEE ALSO

Unity Administrator: System > Schedules
Page 143 in the *System Administration Guide*

INSTRUCTIONS

Use this worksheet to record your decisions about how to set up schedules. Make a photocopy of the worksheet for each schedule, and save the original for future use.

SIGNATURE _____

DATE _____

Profile page

Name:

Recorded voice name

Subscribers can record their own voice name

Maximum recorded name message length (sec):

Directory listing

Listing subscribers in the phone directory:

Subscribers can choose to be listed or not

Subscribers cannot change this setting for themselves

System Access page

Allow subscribers with this COS to:

Access the Unity Administrator application

- Create, edit, or delete call handlers
- Create, edit, or delete class of service objects
- Access diagnostics
- Access reports
- Create, edit, or delete restriction tables
- Create, edit, or delete routing tables
- Create, edit, or delete schedules and holidays
- Access status monitor
- Create, edit, or delete subscribers
- Access technician functions (configuration, licensing, ports and switch pages)
- Create, edit, or delete public distribution lists

Call Transfer Options page

Options available to subscriber:

Subscribers can change call screening options

Subscribers can change call holding options

Messages page

Maximum length of message subscribers can record, in seconds:

Subscribers can send messages to public distribution lists

Greetings page

Maximum greeting length, in seconds:

Licensed Features page

Subscribers with this COS can use the following licensed features

Number of COS Members:

	Total	Used	Available
<input type="checkbox"/> ViewMail for Outlook			
<input type="checkbox"/> ActiveAssistant			
<input type="checkbox"/> Text-to-Speech Email			
<input type="checkbox"/> FaxMail			

Restriction Tables page

Select a restriction table for each type of call the system makes on behalf of subscribers:

Outcalling:

Transfers:

Fax:

SEE ALSO

Unity Administrator: Subscribers > Class of Service
Page 172 in the *System Administration Guide*

INSTRUCTIONS

Use this worksheet to record your decisions about how to set up a class of service. Make a photocopy of the worksheet for each class of service, and save the original for future use.

SIGNATURE _____

DATE _____

Profile pageName: **New subscribers**Class of service: [View](#)Active schedule: [View](#)

Display name generation:

- First name then last name (Jessie Smith)
 Last name then first name (Smith, Jessie)

- Set subscriber for self-enrollment at next login
 List in phone directory

New NT and Exchange users

Exchange alias generation:

- None
 First letter of first name + last name (JSmith)
 First name + first letter of last name (JessieS)
 First name + last name (JessieSmith)

Account pageAccount status: LockedBilling ID (optional): Location: [View](#)**Passwords page****Phone password settings:**

- User cannot change password
 User must change password at next login
 Password never expires

Phone password for new subscribers: **NT password settings:**Password for new NT accounts: **Conversation page****Conversation options**

- Greet subscriber by name

Conversation type:

- Full menus
 Brief menus

Subscriber's language: **Sending Messages**

Address messages to other subscribers:

- By first name first
 By last name first
 By extension

Retrieving Messages

- Announce total number of new messages
 Announce total number of saved messages
 Announce total number of new voice messages
 Announce total number of new fax messages
 Announce total number of new e-mail messages

Listening to a Message

- Announce sender
 Say message number
 Announce timestamp before messages
 Announce timestamp after message

Volume level

- Quieter
 Medium (default)
 Louder

SEE ALSO

Unity Administrator: Subscribers > Subscriber Template
 Page 196 in the *System Administration Guide*

INSTRUCTIONS

Use this worksheet to record your decisions about how to set up a subscriber template. Make a photocopy of the worksheet for each subscriber template, and save the original for future use.

SIGNATURE _____

DATE _____

Call Transfer page

Transfer incoming calls to subscriber's phone?

- No (send directly to subscriber's greeting)
- Yes, ring subscriber's extension: _____
- Yes, ring subscriber at this number: _____

Transfer type:

- Release to switch
 - Supervise transfer
- Rings to wait for:

If the call is busy

- Always hold
- No holding
- Ask caller

Gather caller information:

- Announce
- Introduce (call for *name*)
- Confirm (call can be accepted or refused)
- Ask caller's name

Greetings page

Greeting:
Alternate
Busy
Closed
Internal
Standard

Standard

Status:

- Enabled
- Disabled

Source:

- System
- Recording Volume
- Blank

During greeting:

- Allow caller input

After greeting:

- Take message
- Say goodbye
- Send caller to:
Call handler
Directory handler
Hang up
Interview handler
Sign-in
Subscriber

Specify:

- Reprompt the user after
this many seconds of silence:
- Number of times to reprompt:

Caller Input page

Allow callers to dial an extension during greeting

Milliseconds to wait for additional digits:

Keypad

1	2	3
4	5	6
7	8	9
*	0	#

Key: 1

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 2

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 3

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 4

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 5

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 6

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 9

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 7

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: *

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 8

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 0

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: #

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

- Call handler
 - Directory handler
 - Hang up
 - Interview handler
 - Sign-in
 - Subscriber

Specify:

Messages page

Taking messages from outside callers

Maximum message length, in seconds:

After message action:

- Say goodbye
- Send caller to:

- Call handler
 - Directory handler
 - Hang up
 - Interview handler
 - Sign-in
 - Subscriber

Specify:

Callers can edit messages

Mark messages as urgent?

- Always
- Never
- Ask caller for their preference

Language that outside callers hear

Message Waiting Indicators (MWIs)

Use MWI for message notification

Extension

Profile page


Name:

Created:

Owner:

Owner type:

- Subscriber
- Public distribution list

Recorded voice:


Active schedule: [View](#)

- All Hours - All Days
- Weekdays

Extension (optional):

Language:

Call Transfer page

Transfer Rule applies to:

- Alternate
- Closed
- Standard

Alternate

Status:

Enabled

Disabled

Transfer incoming calls?

No (send directly to this handler's greeting)

Yes, ring message recipient's extension:

Yes, ring a subscriber at this extension:

Transfer type:

Release to switch

Supervise transfer

Rings to wait for:

If the call is **busy**

Always hold

No holding

Ask caller

Gather caller information:

Announce

Introduce ('call for *name*')

Confirm (call can be accepted or refused)

Ask caller's name

SEE ALSO

Unity Administrator: Call Management > Call Handlers
 Page 310 in the *System Administration Guide*

INSTRUCTIONS

Use this worksheet to record your decisions about how to set up a call handler. Make a photocopy of the worksheet for each call handler, and save the original for future use.

SIGNATURE _____

DATE _____

Greetings page

Greeting:

- Alternate
- Busy
- Closed
- Internal
- Standard

Standard

Status:

Enabled

Disabled

Source:

System

Recording Volume

Blank

During greeting:

Allow caller input

After greeting:

Take message

Say goodbye

Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Reprompt the user after this many seconds of silence:

Number of times to reprompt:

Caller Input page

Allow callers to dial an extension during greeting

Milliseconds to wait for additional digits:

Keypad

1	2	3
4	5	6
7	8	9
*	0	#

Key: 1

Lock this key to the action (don't wait for an additional keypad)

Action:

Ignore key

Skip greeting

Take message

Say goodbye

Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 2

Lock this key to the action (don't wait for an additional keypad)

Action:

Ignore key

Skip greeting

Take message

Say goodbye

Send caller to:

- Call handler
- Directory handler
- Hang up
- Interview handler
- Sign-in
- Subscriber

Specify:

Key: 3

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler

Directory handler

Hang up

Interview handler

Sign-in

Subscriber

Specify:

Key: 6

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler

Directory handler

Hang up

Interview handler

Sign-in

Subscriber

Specify:

Key: 4

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler

Directory handler

Hang up

Interview handler

Sign-in

Subscriber

Specify:

Key: 7

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler

Directory handler

Hang up

Interview handler

Sign-in

Subscriber

Specify:

Key: 5

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler

Directory handler

Hang up

Interview handler

Sign-in

Subscriber

Specify:

Key: 8

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler

Directory handler

Hang up

Interview handler

Sign-in

Subscriber

Specify:

Key: 9

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler
 Directory handler
 Hang up
 Interview handler
 Sign-in
 Subscriber

Specify:

Key: *

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler
 Directory handler
 Hang up
 Interview handler
 Sign-in
 Subscriber

Specify:

Key: 0

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler
 Directory handler
 Hang up
 Interview handler
 Sign-in
 Subscriber

Specify:

Key: #

Lock this key to the action (don't wait for an additional keypress)

Action:

- Ignore key
- Skip greeting
- Take message
- Say goodbye
- Send caller to:

Call handler
 Directory handler
 Hang up
 Interview handler
 Sign-in
 Subscriber

Specify:

Messages page

Message recipient:
 A selected subscriber
 Public Distribution List

Specify:

How to take messages

Maximum message length, in seconds:

After message action:

Say goodbye

Send caller to:

Call handler
 Directory handler
 Hang up
 Interview handler
 Sign-in
 Subscriber

Specify:

Callers can edit messages

Mark messages as urgent?

Always

Never

Ask caller for their preference

Direct calls page

Routing Table: Direct Calls

Change rule order

Rule	Status	Call Type	Port	Trunk	Dialed Number	Calling Number	Schedule	Send call to
<u>Live Record</u>	On	Both	Any	Any	Any	Any	Always	Start live record
<u>Attempt Sign-In</u>	On	Both	Any	Any	Any	Any	Always	Attempt Sign-in
<u>Default Call Handler</u>	On	Both	Any	Any	Any	Any	Always	Attempt transfer for Opening Greeting

Forwarded calls page

Routing Table: Forwarded Calls

Change rule order

Rule	Status	Call Type	Forwarding Station	Dialed Number	Calling Number	Schedule	Send call to
<u>Attempt Forward to Greeting</u>	On	Both	Any	Any	Any	Always	Attempt Forward
<u>Default Call Handler</u>	On	Both	Any	Any	Any	Always	Attempt transfer for Opening Greeting

SEE ALSO

Unity Administrator: Call Management > Call Routing
Page 347 in the *System Administration Guide*

INSTRUCTIONS

Use this worksheet to record your decisions about how to set up call routing tables. Photocopy the worksheet, and save the original for future use.

SIGNATURE _____

DATE _____