



# Subscriber and Operator Orientation

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## Overview: Subscriber and Operator Orientation

Subscribers and operators in your organization need information about Cisco Unity that is specific to your installation. This chapter reviews the preparations for orienting subscribers and operators to Cisco Unity.

Refer to the following sections in this chapter for more information:

- [Subscriber Orientation, page 5-1](#)—This section provides a list of tasks to perform before subscribers begin using Cisco Unity.
- [Operator Orientation, page 5-6](#)—This section provides information specific to operators who will be using Cisco Unity.
- [Message Handling, page 5-7](#)—This section describes how to handle messages that are sent to the Unaddressed Messages and System Event Messages public distribution lists.
- [Recording Phone Calls with Live Record, page 5-8](#)—This section discusses the recording of phone conversations by using the live record feature.

## Subscriber Orientation

When adding new subscribers to Cisco Unity, complete the following tasks before subscribers begin using the system:

- Give each subscriber a *Cisco Unity User Guide*, and provide training as necessary. If you have AMIS, Internet, or Bridge subscribers in your organization, review the *Networking in Cisco Unity* guide and the *Cisco Unity Bridge Installation Guide* for information on how Cisco Unity behaves differently for these types of subscribers.
- To find out more about what subscribers should expect when Cisco Unity is in failover mode—specifically, the effect of failover on the management of their voice messages while using the Cisco Unity phone conversation, ViewMail, the Cisco Unity Visual Messaging Interface, and/or the ActiveAssistant—refer to the *Cisco Unity Failover Guide*.
- Give subscribers the phone numbers that they dial from inside and from outside the organization to access Cisco Unity. Also give them the name and extension of the system administrator. There are spaces to record this information in the *Cisco Unity User Guide*.
- Provide each subscriber with the default phone password.
- If subscribers are set up to use the ActiveAssistant, give them the URL to access it. The URL for the ActiveAssistant is `http://<server name>/web/aa`. (Note that the ActiveAssistant is not available across a firewall.)

If the Cisco Unity server is in a different domain than the one that subscribers log on to access their computers, customize subscriber browsers so that subscribers are prompted for a user name, password, and domain when they access the ActiveAssistant. Alternatively, you can establish trusts across domains so that subscribers do not have to log on each time that they want to play a message.

- If subscribers are set up to use the Cisco Unity Visual Messaging Interface (VMI), give them the URL to access it. The URL for the Cisco Unity VMI is `http://<server name>/web/vmi`. (Note that the Cisco Unity VMI is not available across a firewall.)

When setting up Cisco Unity VMI for subscribers, keep in mind the following:

- If the Cisco Unity server is in a different domain than the one that subscribers log on to access their computers, customize subscriber browsers so that subscribers are prompted for a user name, password, and domain when they access the Cisco Unity VMI. Alternatively, you can establish trusts across domains so that subscribers do not have to log on each time that they want to play a message.

- Confirm that browsers are set to enable Java and to allow the scripting of Java applets and Active Scripting.
- If virus scanners are set to scan downloaded files, confirm that they scan only program files.
- You should notify subscribers that if they access Cisco Unity VMI over a modem connection, the first time may be slow, because the Cisco Unity VMI file is over 1MB in size, and it may take some time to download.

Detailed instructions on using Cisco Unity VMI are available to subscribers in online Help.

- If your organization uses Digital Networking to network Cisco Unity servers together, explain to subscribers how to address voice messages over the phone to other locations. Refer to the *Networking in Cisco Unity* guide, which is available on Cisco.com at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/unity31/net/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/unity31/net/index.htm).
- If your organization uses AMIS or the Cisco Unity Bridge, refer to the *Networking in Cisco Unity* guide to learn more about the impact these features may have on subscribers.
- Enable call forwarding (to Cisco Unity) and easy message access at each extension, if necessary.
- Give subscribers phone-specific information, such as how to turn on live record. See the “Recording Phone Calls with Live Record” section on page 5-8 for details.
- Install ViewMail for Outlook on the computers used by subscribers, as appropriate. For more details, see the section below. Note that you should not install Outlook on the Cisco Unity server as it is incompatible with Exchange.

### Installing ViewMail for Outlook

You will find the ViewMail for Outlook files on Cisco Unity Disc 1 in the ViewMail directory. You can install ViewMail on subscriber computers in a number of ways, though Outlook should not be running on subscriber computers when ViewMail is installed. Typically, organizations provide subscribers with network access to the ViewMail setup application so that they can set it up themselves.

**Caution**

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When installing a new version of Microsoft Outlook, you must first uninstall ViewMail. After you have installed Outlook, reinstall ViewMail. Otherwise, ViewMail will seem to be installed properly on the new Outlook, but it will not work.

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ViewMail requires the installation of Microsoft Collaboration Data Objects (CDO) on each subscriber computer. Outlook 98 automatically installs CDO, but CDO is an optional component with Outlook 2000 and Outlook 2002. If subscribers who use these versions of Outlook do not have CDO installed, they should first add it to Outlook before installing ViewMail. To do so, they need to customize their installation of Microsoft Office by using the Windows Add/Remove Programs dialog box when they add the CDO feature to Outlook.

Consider providing sound cards, speakers and microphones to subscribers who use ViewMail for Outlook. Without speakers and microphones, subscribers must listen to and record messages by phone.

**Customizing ViewMail**

When using ViewMail in a low bandwidth deployment (for example, with a slow modem or in a branch office), subscribers should download messages before playing them for best performance and quality. You can also reduce the amount of disk space needed for storing sent messages on subscriber computers by saving only the message headers for the voice messages that they send, and not the message recordings.

Use the following procedures to set up either of these options on subscriber computers. Subscribers can also refer to the ViewMail online Help to set up these options on their own.

**To download messages before playing them**

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- Step 1** On the Outlook Tools menu, click **ViewMail Options**.
  - Step 2** Click the **Playback** tab.
  - Step 3** Check the **Download Audio Before Playing** check box.
  - Step 4** Click **OK** to save your changes.
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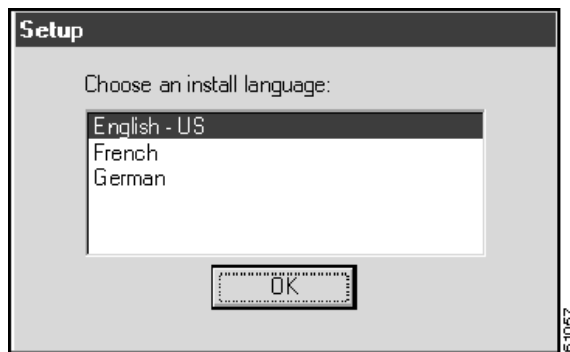
### To save only message headers

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- Step 1 On the Outlook Tools menu, click **ViewMail Options**.
  - Step 2 Click the **General** tab.
  - Step 3 Check the **Keep Only Message Header in the Sent Items Folder** check box.
  - Step 4 Click **OK** to save your changes.
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### ViewMail with Multiple Languages

If you have purchased more than one language for your Cisco Unity system, subscribers can select a language to install from the ViewMail Setup dialog box which appears when they launch the ViewMail Setup application.

*Figure 5-1 ViewMail Setup Dialog Box*

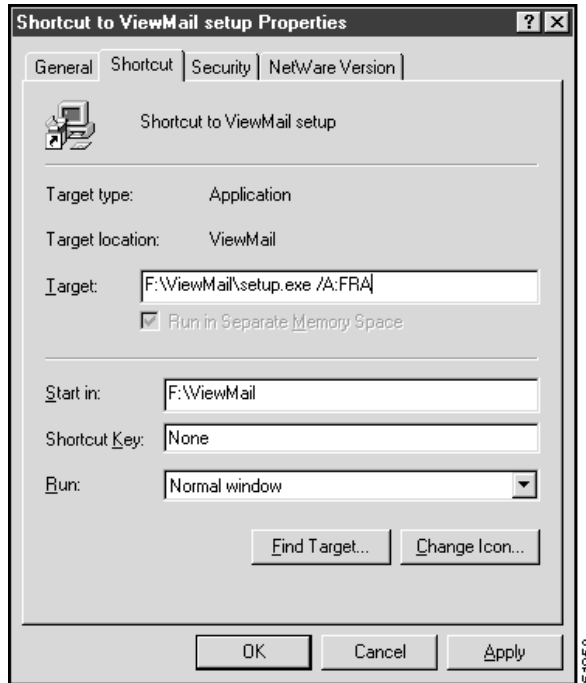


By default, the ViewMail Setup dialog box instructions are presented in English. You can change the language of the ViewMail Setup instructions by using a command line argument. For example, to present subscribers with ViewMail Setup instructions in French, use the following command line:

```
<servername>\Cisco Unity\clients\viewmail\setup.exe /A: FRA
```

If you do so, send subscribers a new shortcut to the ViewMail Setup application with the command line argument specified on the Properties tab of the shortcut as depicted in [Figure 5-2](#). When a subscriber clicks the new shortcut, the ViewMail Setup dialog box will launch and the instructions will be presented in the language you selected.

**Figure 5-2** ViewMail Setup Properties Dialog Box



## Operator Orientation

Operator orientation should address the same points as subscriber orientation, but in greater detail. Operators must be familiar with how subscribers use Cisco Unity. When subscribers have questions about Cisco Unity, the operator is the person they are likely to ask.

In addition to the items discussed in the [“Subscriber Orientation”](#) section on [page 5-1](#), operators also need to understand the following concepts and tasks:

### **Roles of the operator and the automated attendant**

The way your organization uses the automated attendant determines what the operator responsibilities are. The automated attendant is a call handler that is used in place of a human operator to answer and direct calls by playing greetings and responding to touchtones. The automated attendant can provide a menu of options (for example, “For Sales, press 1; for Service, press 2.”), and it can also provide information (for example, “Our normal business hours are Monday through Friday, 8 A.M. to 5 P.M.”).

### **Directing calls**

Regardless of how your organization uses the automated attendant, many calls will go to the operator. The operator must know how to direct calls to voice mail and to subscriber phones. To direct calls to voice mail, the operator can dial Cisco Unity and at the opening greeting, dial the subscriber extension and then press #2. The procedure for directing calls to a subscriber phone depends on the phone system. Consult your phone system documentation for details.

## **Message Handling**

In some situations, messages left in Cisco Unity are not associated with a specific recipient, and so they must be screened and routed to the appropriate subscriber or call handler. A subscriber should be assigned the responsibility of reviewing these messages frequently.

Such messages are left as follows:

### **Unaddressed Messages distribution list**

Messages that cannot be delivered because the network or a home Exchange server assigned to a subscriber goes down, or because the subscriber mailbox is full, are forwarded to the Unaddressed Messages distribution list. By default, this distribution list contains the Example Administrator as its only member. To route these messages properly, add a subscriber (such as the operator) to the Unaddressed Messages distribution list. For information on adding subscribers to a distribution list, see the [“Overview: Public Distribution Lists”](#) section on [page 14-1](#).

### Operator call handler

When a caller to Cisco Unity dials the operator and no operator is available, the caller can leave a message, depending on the call transfer settings for the Operator call handler. By default, messages left in the Operator call handler are sent to the Unaddressed Messages distribution list.

### Example Interview

When callers are routed to the Example Interview, which gathers basic information about who they are and who they are trying to reach, the answers to the questions are routed by default to the Example Administrator. If you want these messages to be routed to another recipient, choose a subscriber (such as the operator) or a distribution list as the recipient. For information on choosing an interview response recipient, see the [“Overview: Interview Handler Settings” section on page 18-1](#).

## Recording Phone Calls with Live Record

Depending on the phone system that your organization uses, subscribers and operators may be able to record a conversation while talking to a caller by using the live record feature. The recorded conversation is stored as a message in the subscriber Inbox, and the subscriber can review it later or redirect it to another subscriber or group of subscribers.

Be sure to advise subscribers and operators of any potential legal issues.