



## 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. See the following sections:

- [Subscriber Orientation, page 8-1](#)
- [Operator Orientation, page 8-4](#)

### Subscriber Orientation

After you create subscriber accounts and set up the client applications that subscribers will use to access Cisco Unity from their computers, complete the tasks in this section to acquaint subscribers with Cisco Unity. If you have AMIS, Internet, Bridge, or VPIM subscribers in your organization, review the *Networking in Cisco Unity Guide* and/or the *Cisco Unity Bridge Networking Guide* for information on how Cisco Unity behaves differently for these types of subscribers, and acquaint them with Cisco Unity accordingly.

- Give each subscriber a *Cisco Unity User Guide*, a *Cisco Unity Phone Menus* card, or the URLs to both. Note that the Cisco Unity touchtone phone menus described in the *Cisco Unity User Guide* depict the standard conversation, rather than the Optional Conversation 1 (see the [“Activating Optional Conversation 1”](#) section on page 6-2 for more information).

Subscriber documentation is available on Cisco.com at

[http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products\\_user\\_guide\\_list.html](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_user_guide_list.html).

- 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* and the *Cisco Unity Phone Menus* card. If you enable easy message access on their phones, show them which button or key to use to access Cisco Unity.
- Provide each subscriber with a phone password. Subscriber template settings include an initial phone password for subscribers, which is 12345. See the [“Subscriber Template Passwords Settings”](#) section on page 13-5 for more information.
- Give subscribers the URL to the Cisco Personal Communications Assistant (PCA) website: <http://<Cisco Unity server name>/ciscopca>. Subscribers can use the Cisco PCA website to access the Cisco Unity Assistant and the Cisco Unity Inbox, as applicable. There are spaces to record this information in the *Cisco Unity User Guide* and the *Cisco Unity Phone Menus* card.

Note that in version 3.1 and earlier, the Cisco Unity Assistant was known as the ActiveAssistant, or AA; the Cisco Unity Inbox was known as the Visual Messaging Interface, or VMI. Subscribers who use bookmarked ActiveAssistant and VMI URLs will be redirected automatically to the Cisco PCA website.

If you set up Cisco Unity to use SSL, but did not distribute the certificate to the trusted root store for all users in the domain by adding it to the Group Policy (or did not tell subscribers how to add the certificate to the trusted root store on their own computers), advise subscribers about the security alert that will be displayed each time that they access the Cisco PCA. Tell them that they can ignore the warning and proceed to use the Cisco PCA without doing any harm to their computers or the network.

(To prevent the browser from displaying the security alert, see the “[Configuring Subscriber Browsers to Use the Cisco PCA](#)” section on page 7-8.)

- If your organization has enabled the warning tone for the maximum allowable recording length, explain to subscribers that as they record messages, a warning tone will sound before they reach the maximum recording length. When they hear the warning tone, they must conclude the message. For more information on the warning tone, see the “[Enabling a Warning Tone for End of Recording](#)” section on page 28-19.
- If your organization uses Digital Networking to network Cisco Unity servers together, explain to subscribers the methods for addressing voice messages to other locations: over the phone, in ViewMail, and in the Cisco Unity Inbox. For detailed information, refer to the *Networking in Cisco Unity Guide*, which is available on Cisco.com at [http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products\\_installation\\_and\\_configuration\\_guide\\_books\\_list.html](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html).
- Make sure that subscribers who own call handler or public distribution list understand their responsibilities, and know how to use the Cisco Unity Greetings Administrator (if applicable). Review the “[Forwarding Unaddressed Messages to the Appropriate Recipients](#)” section on page 9-13 and the “[Using the Cisco Unity Greetings Administrator to Change Call Handler Greetings](#)” section on page 21-5 for more information.
- Provide training on using the phone or the Cisco Unity Assistant to personalize subscriber settings in Cisco Unity, as summarized in [Table 8-1](#). Subscribers can refer to the *Cisco Unity User Guide* or the online Help available in the Cisco Unity Assistant for further guidance after orientation.

**Table 8-1 Settings That Subscribers Can Change**

Settings That Can Be Changed in the Cisco Unity Assistant	Settings That Can Be Changed in the Phone Conversation
Greetings: <ul style="list-style-type: none"> <li>• Record a personal greeting</li> <li>• Enable or disable greeting</li> <li>• Switch between system prompt and personal greeting</li> </ul>	Greetings: <ul style="list-style-type: none"> <li>• Record a personal greeting</li> <li>• Enable or disable greeting</li> </ul>
Call Transfers: <ul style="list-style-type: none"> <li>• Transfer calls to an extension or send to the greeting</li> <li>• Change extension</li> </ul>	Call Transfers: <ul style="list-style-type: none"> <li>• Transfer calls to an extension or send to the greeting</li> <li>• Change extension</li> </ul>

**Table 8-1 Settings That Subscribers Can Change (continued)**

Settings That Can Be Changed in the Cisco Unity Assistant	Settings That Can Be Changed in the Phone Conversation
<p>Call Holding and Screening:</p> <ul style="list-style-type: none"> <li>• Select the action that Cisco Unity performs for unidentified callers when the subscriber phone is busy, including placing the caller on hold, prompting the caller to hold or leave a message, and sending the caller directly to the greeting</li> <li>• Select the action that Cisco Unity performs when the subscriber answers calls from unidentified callers, including telling the subscriber who the call is for, announcing that Cisco Unity is transferring the call, prompting the subscriber to accept or refuse a call, and prompting callers to say their names</li> </ul>	<p>Call Holding and Screening:</p> <p>None</p>
<p>Message Notification:</p> <ul style="list-style-type: none"> <li>• Enable or disable a notification device, and change its number</li> <li>• Specify dialing options</li> <li>• Select the types of messages and message urgency for which Cisco Unity will call a device</li> <li>• Set up a notification schedule, and specify what happens when a device does not answer, is busy, or fails</li> </ul>	<p>Message Notification:</p> <p>Enable or disable a notification device, and change its number</p>
<p>Message Playback:</p> <ul style="list-style-type: none"> <li>• Select full or brief Cisco Unity conversation menus</li> <li>• Select the action that Cisco Unity performs when the subscriber calls Cisco Unity, including greeting the subscriber by name and announcing the number of new messages by type</li> <li>• Select the action that Cisco Unity performs when messages are played, including announcing the name and number of the sender who left a message, whether the timestamp is played before or after the message, and the volume level at which messages are played</li> </ul>	<p>Message Playback:</p> <p>Select full or brief Cisco Unity conversation menus</p>
<p>Message Addressing:</p> <ul style="list-style-type: none"> <li>• Switch between addressing messages to other subscribers by name, or by extension*</li> <li>• Specify order for addressing messages by name (last name followed by first name, or vice versa)</li> </ul>	<p>Message Addressing:</p> <p>Switch between addressing to other subscribers by name or by extension (by pressing ##)*</p>

**Table 8-1 Settings That Subscribers Can Change (continued)**

Settings That Can Be Changed in the Cisco Unity Assistant	Settings That Can Be Changed in the Phone Conversation
Caller Options: <ul style="list-style-type: none"> <li>• Allow callers to edit messages</li> <li>• Allow callers to mark messages urgent</li> </ul>	Caller Options: None
Personal Settings: <ul style="list-style-type: none"> <li>• Record a name</li> <li>• Specify a fax delivery number</li> <li>• Change directory listing status</li> <li>• Change password</li> <li>• Select the language used for the subscriber phone conversation</li> </ul>	Personal Settings: <ul style="list-style-type: none"> <li>• Record a name</li> <li>• Specify fax delivery number</li> <li>• Change directory listing status</li> <li>• Change password</li> </ul>
Private Lists: <ul style="list-style-type: none"> <li>• Enter a display name</li> <li>• Record a name</li> <li>• Add and delete members</li> </ul>	Private Lists: <ul style="list-style-type: none"> <li>• Add and delete members</li> </ul>

\*Note that this depends on whether you have enabled spelled name addressing. See the [“Configuration Settings” section on page 28-2](#) for details.

## 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 8-1](#), 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 subscriber phone does not ring, and the transferred caller hears the subscriber greeting.

You can also create a call handler for each subscriber to send calls directly to their greetings. For details on setting this up, refer to the techtip, “How to Transfer a Caller Directly into a Mailbox,” available on Cisco.com.

#### **Forwarding Unaddressed Messages to Intended Recipients**

If an operator also owns a call handler or public distribution list, make sure that the operator knows to review unaddressed messages frequently, and to forward them to the intended recipient(s). See the [“Forwarding Unaddressed Messages to the Appropriate Recipients”](#) section on page 9-13 for details.

#### **Using the Cisco Unity Greetings Administrator**

An operator who is responsible for changing call handler greetings for the organization can use the Cisco Unity Greetings Administrator whenever changing a greeting in the Cisco Unity Administrator is not practical. For example, if the office is unexpectedly closed because of bad weather, the operator can use the Cisco Unity Greetings Administrator to enable the alternate Opening Greeting, or to rerecord a call handler greeting stating that the office is closed. For more information, see the [“Using the Cisco Unity Greetings Administrator to Change Call Handler Greetings”](#) section on page 21-5.

