



User Orientation

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Orientation Task List for Unity Connection Users

After you set up the client applications that users will use to access Cisco Unity Connection from their phones and computers, use the following task list to acquaint users with Unity Connection. If you are planning supplemental Unity Connection training, also consider reviewing the potential user concerns and misconceptions listed in the [Support Desk Orientation](#) section.

Offer User Documentation and Contact Information

1. Give users a Cisco Unity Phone Menus and Shortcuts wallet card. Use the Wallet Card wizard to produce the card. The templates in the wizard list frequently used menu options and shortcuts for managing Unity Connection messages and user preferences by phone; the wizard fills in the applicable keys based on the conversation that you specify. The resulting PDF is formatted as a wallet card that can be printed, then cut out and folded by users.

Procedures in the User Guide for the Cisco Unity Connection Phone Interface do not contain the keys that users press for Unity Connection menu options. Instead, the procedures use the prompts that users hear to specify the menu options to choose. To provide users with key information, you must use the Wallet Card wizard.

The Wallet Card wizard also allows you to customize technical support information and instructions for signing in to Unity Connection. The Wallet Card wizard is a Windows-based remote database administration tool. Download the tool and view Help at <http://www.ciscocitytools.com/Applications/CxN/WalletCardWizard/WalletCardWizard.html>.

2. Give each user applicable user guides. The following Cisco Unity Connection user guides are available at http://www.cisco.com/en/US/products/ps6509/products_user_guide_list.html.
 - User Guide for the Cisco Unity Connection Phone Interface
 - User Guide for the Cisco Unity Connection Messaging Assistant Web Tool
 - User Guide for the Cisco Unity Connection Messaging Inbox Web Tool

- User Guide for Accessing Cisco Unity Connection Voice Messages in an Email Application
- User Guide for the Cisco Unity Connection Personal Call Transfer Rules Web Tool
- *Quick Start Guide: Using the Cisco Unity Connection Web Inbox*
- *Quick Start Guide: Using Cisco ViewMail for Microsoft Outlook*

Information in the guides is generally organized by feature. You can distribute the guides for the interfaces that users are using, or you can distribute feature-specific information to users for whom you have enabled the features. (On Cisco.com, select the link for the topics you want, and print the PDF files.)

3. Give users the phone numbers that they dial to access Unity Connection from within your organization and from outside the organization. As applicable, show users which button or key to use on their desk phones to access Unity Connection.
4. Give users the URL to the Cisco PCA website: <http://<Unity Connection server name>/ciscopca>.
5. Give users the URL to the Cisco Unity Connection Web Inbox: <http://<Unity Connection server name>/inbox>.
6. Give users the name, extension, and/or email address of the Unity Connection administrator and any support desk contact information.
7. Depending on the conversation version that users in your organization are familiar with, you may want to provide them with a list of phone menu differences between Unity Connection and a former voice messaging system—especially if you choose not to offer them an alternative to the standard conversation, which is specified by default in the Voice Mail User template.

Provide PINs, Passwords, and Security Guidelines

8. Provide users with their initial phone PINs. Alternatively, tell users to sign in to the Cisco Personal Communications Assistant (PCA) website to set their phone PINs before they call Unity Connection to complete first-time enrollment. (Users are not required to enter an existing phone PIN in order to change it in the Cisco PCA.)

If users choose not to initially change their PIN in the Cisco PCA, they are prompted to change their phone PIN during first-time enrollment.

9. Provide users with their initial Cisco PCA passwords. Users must use the Unity Connection Messaging Assistant to change their Cisco PCA passwords.
10. Explain to users how to secure their phone and Cisco PCA PINs and passwords so that they adequately protect their Unity Connection mailboxes from unauthorized access. Detail the security guidelines for your organization. Encourage users to enter secure PINs and passwords whenever they change them.
11. Make sure users understand that their Cisco PCA passwords are not related to their Unity Connection phone PINs, nor are the passwords and PINs synchronized. Users may assume that their phone and Cisco PCA PIN and password are the same. As a result, they may think that they are changing both when the Unity Connection conversation prompts them to change their phone PIN during first-time enrollment. For this reason, you may find that many users do not consider securing their Cisco PCA passwords, even though you request that they do so.

Remind Users to Complete First-Time Enrollment

12. Make sure that users know that they need to complete first-time enrollment by phone. They do not need to refer to any Unity Connection documentation during enrollment. Unity Connection indicates when the enrollment process is complete. If users hang up before they have completely enrolled, none of their

changes are saved and the first-time enrollment conversation plays again the next time that they sign in to Unity Connection.

The “[Enrolling as a Cisco Unity Connection User](#)” chapter of the User Guide for the Cisco Unity Connection Phone Interface (Release 11.x), available at http://www.cisco.com/c/en/us/td/docs/voice_ip_comm/connection/11x/user/guide/phone/b_11xcucugphone.html, details the tasks that users are asked to complete as part of enrollment.

Explain How Unity Connection Features and Functionality Work

13. Provide training on how to personalize user settings using the phone and the Unity Connection Messaging Assistant, as summarized in [Table 1: Settings Users Change Using the Messaging Assistant and Phone Menus](#). In particular, users may benefit from a hands-on demonstration of the Messaging Assistant, as they may not be accustomed to using a web interface to set voice messaging options.
14. Provide training on how to use the Cisco Unity Connection Personal Call Transfer Rules web tool, and how call transfers, call holding and screening, and caller options are used, as summarized in [Table 2: Settings Users Change Using the Cisco Unity Connection Personal Call Transfer Rules Web Tool and Phone Menus](#).

See the [User Guide for the Cisco Unity Connection Personal Call Transfer Rules Web Tool \(Release 11.x\)](#) or to Cisco Unity Connection Personal Call Transfer Rules Help for further guidance after orientation.
15. Explain how full mailboxes work with Unity Connection. See the [Support Desk Orientation](#) for issues that users may encounter. Refer users to the appropriate user guides for similar information.
16. *If single inbox is configured:* Discuss single-inbox behavior with users
17. If your organization has users who will use RSS readers to access voice messages, provide training on using RSS with Unity Connection.
18. If your organization has users who will use TTY and the TTY prompt set, provide training on using TTY with Unity Connection.
19. Make sure that users who own call handlers or system distribution lists understand their responsibilities (if applicable).
20. As applicable, tell users how to use the Cisco Unity Greetings Administrator and System Broadcast Administrator.

Settings that Unity Connection Users can Change

Settings Users Change Using Messaging Assistant and Phone Menu

Table 1: Settings Users Change Using the Messaging Assistant and Phone Menus

Settings Changed Using the Messaging Assistant	Settings Changed Using the Phone Menus
<p>Call Holding and Screening(1) :</p> <ul style="list-style-type: none"> • Select how Unity Connection handles indirect calls when the user 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 • Select how Unity Connection handles indirect calls, including telling the user who the call is for, announcing that Unity Connection is transferring the call, prompting the user to accept or refuse a call, and prompting callers to say their names 	<p>Call Holding and Screening1:</p> <ul style="list-style-type: none"> • None
<p>Call Transfers(2) :</p> <ul style="list-style-type: none"> • Configure the three basic transfer rules: standard, alternate, and closed hours • Enable or disable personal call transfer rules for each of the basic transfer rules • Transfer indirect calls to an extension or send them to the user greeting • Change extensions 	<p>Call Transfers2:</p> <ul style="list-style-type: none"> • Configure the three basic transfer rules: standard, alternate, and closed hours • Enable or disable personal call transfer rules for each of the basic transfer rules • Transfer indirect calls to an extension or send them to the user greeting • Change extensions • Configure alternate contact numbers for caller input keys that are assigned to the Transfer to Alternate Contact Number action
<p>Caller Options:</p> <ul style="list-style-type: none"> • Allow callers to edit messages • Allow callers to mark messages urgent 	<p>Caller Options:</p> <ul style="list-style-type: none"> • None

Settings Changed Using the Messaging Assistant	Settings Changed Using the Phone Menus
<p>Phone Menu Options:</p> <ul style="list-style-type: none"> • Set language for Unity Connection prompts • Specify whether users use the phone keypad or voice-recognition input style • Set speed and volume of prompts, recorded names, and user greetings • Select full or brief Unity Connection conversation menus • Select the action that Unity Connection performs when the user calls Unity Connection, including greeting the user by name, and announcing the number of new messages by type • Change the time format used for message time stamps • Specify alternate extensions 	<p>Phone Menu Options:</p> <ul style="list-style-type: none"> • Select full or brief Unity Connection conversation menus
<p>Greetings:</p> <ul style="list-style-type: none"> • Record a personal greeting • Enable or disable greeting • Specify an expiration date for an enabled greeting • Switch between system prompt and personal greeting 	<p>Greetings:</p> <ul style="list-style-type: none"> • Record a personal greeting • Enable or disable greeting • Specify an expiration date for an enabled greeting
<p>Message Notification:</p> <ul style="list-style-type: none"> • Enable or disable a notification device • Specify dialing or recipient options • Select the types of messages and message urgency for which Unity Connection generates a notification • Specify a list of message senders (by username or calling phone number) for which Unity Connection generates a notification • Set up a notification schedule, and specify what happens when a device does not answer, is busy, or fails 	<p>Message Notification:</p> <ul style="list-style-type: none"> • Enable or disable a notification device, and change its number

Settings Changed Using the Messaging Assistant	Settings Changed Using the Phone Menus
<p>Message Playback:</p> <ul style="list-style-type: none"> • Specify the speed and volume of messages that are played by phone • Specify message playback order • Specify whether Unity Connection plays the Message Type menu • Select the action that Unity Connection performs when messages are played, including announcing the name and number of the sender who left a message, and whether the time stamp is played before or after the message • Specify that messages are marked saved upon hang-up or disconnect • Specify whether Unity Connection asks to confirm deletions of new and saved messages 	<p>Message Playback:</p> <ul style="list-style-type: none"> • Speed and volume of message as it is played
<p>Message Sending and Addressing:</p> <ul style="list-style-type: none"> • Specify that Unity Connection prompts to confirm message recipients by name • Specify that Unity Connection prompts to continue adding names after each recipient • Specify that Unity Connection sends messages when users hang up or a call is disconnected • Switch between addressing messages to other users by name, or by extension • Specify order for addressing messages by name (last name then first name, or vice versa) 	<p>Message Addressing:</p> <ul style="list-style-type: none"> • Switch between addressing to other users by name or by extension (by pressing ##)(3) • Review, add, or remove names in the addressing priority list(4)
<p>Personal Settings:</p> <ul style="list-style-type: none"> • Record a name • Specify alternate names • Change directory listing status • Change password or PIN • Add user-defined alternate extensions(5) 	<p>Personal Settings:</p> <ul style="list-style-type: none"> • Record a name • Change directory listing status • Change password or PIN • Add user-defined alternate extensions5 • Edit alternate contact numbers, if an administrator has configured one or more caller input keys to transfer to an alternate contact number during the user greeting

Settings Changed Using the Messaging Assistant	Settings Changed Using the Phone Menus
Private Lists: <ul style="list-style-type: none"> • Enter a display name • Record a list name • Add and delete members 	Private Lists: <ul style="list-style-type: none"> • Record a list name • Add and delete members
Contacts: <ul style="list-style-type: none"> • Set up contacts to use for both name dialing and call transfer rules 	Contacts: <ul style="list-style-type: none"> • None
12345	

- ¹ (1) Call holding and screening options apply only to incoming calls that were routed to the user from the automated attendant or a directory handler, and not on direct calls. Holding and screening options do not apply when an outside caller or another user dials a user extension directly. In addition, holding and screening options are only available when supervised transfers are enabled. These settings apply if the user does not have personal call transfer rules enabled.
- ² (2) Call transfer options apply only to incoming calls that were routed to the user from the automated attendant or a directory handler, and not on direct calls. Transfer options do not apply when an outside caller or another user dials a user extension directly.
- ³ (3) Note that this depends on whether you have enabled spelled name addressing.
- ⁴ (4) To enable users to access the setup conversation that allows them to review, add, or remove names in the addressing priority list, the users must be assigned to a custom conversation, and you must use the Custom Keypad Mapping tool to map the Addressing Priority List conversation to a key in the Message Settings menu for that conversation.
- ⁵ (5) Users must belong to a class of service with the Allow Users to Manage Their User-Defined Alternate Extensions option enabled. To enable users to access the phone menu conversation that allows them to review, add, or remove alternate extensions, the users must be assigned to a custom conversation, and you must use the Custom Keypad Mapping tool to map the Edit User-Defined Alternate Extensions option to a key in the Preferences Menu for that conversation.

Settings Users Change Using Cisco Unity Connection Personal Call Transfer Rules and Phone Menu

Table 2: Settings Users Change Using the Cisco Unity Connection Personal Call Transfer Rules Web Tool and Phone Menus

Settings Changed Using the Personal Call Transfer Rules Web Tool	Settings Changed Using the Phone Menus
<p>Call Holding and Screening:</p> <ul style="list-style-type: none"> • Set up personal call transfer rules to specify how Unity Connection handles direct and indirect calls when the user 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 • Set up personal call transfer rules to specify how Unity Connection handles direct and indirect calls, including telling the user who the call is for, announcing that Unity Connection is transferring the call, prompting the user to accept or refuse a call, and prompting callers to say their names 	<p>Call Holding and Screening:</p> <ul style="list-style-type: none"> • None
<p>Call Transfers:</p> <ul style="list-style-type: none"> • Set up personal call transfer rules to transfer direct and indirect calls to an extension, to an external phone number, or to the greeting 	<p>Call Transfers:</p> <ul style="list-style-type: none"> • Enable or disable personal call transfer rules to transfer direct or indirect calls to an extension, to an external phone number, or to the greeting • Enable or disable the Transfer All rule set to forward all calls to voicemail or to another phone number • Forward all incoming calls directly to Unity Connection, rather than to phone extension
<p>Caller Options:</p> <ul style="list-style-type: none"> • Allow callers to edit messages • Allow callers to mark messages urgent 	<p>Caller Options:</p> <ul style="list-style-type: none"> • None

Settings Changed Using the Personal Call Transfer Rules Web Tool	Settings Changed Using the Phone Menus
<p>Destinations:</p> <ul style="list-style-type: none">• Set up phone numbers or notification devices to use when transferring calls• Set up groups of destinations to use in personal call transfer rules• Specify the number of rings that Unity Connection waits before transferring the call to the next destination or to voicemail	<p>Destinations:</p> <ul style="list-style-type: none">• None
<p>Caller Groups</p> <ul style="list-style-type: none">• Create groups of user-defined contacts, administrator-defined contacts, or Unity Connection users to use in personal call transfer rules	<p>Caller Groups</p> <ul style="list-style-type: none">• None

