



# CHAPTER 15

## Setting Up System Transfers in Cisco Unity Connection 9.x

See the following sections:

- [System Transfer Overview in Unity Connection, page 15-1](#)
- [Task List: Offering Caller System Transfers in Unity Connection, page 15-2](#)
- [Task List: Offering User System Transfers in Unity Connection, page 15-4](#)

### System Transfer Overview in Unity Connection

In your organization, you may find that callers want to be able to dial numbers that are not typically listed in the corporate directory. For example, users and outside callers may find it convenient to be able to call Cisco Unity Connection and transfer from the Opening Greeting or another call handler to a lobby extension, conference room extension, or an extension assigned to someone in the organization who is not a Unity Connection user, such as an employee who is visiting from another site and is using a guest office. In addition, some users may want to be able to call Unity Connection and then transfer to phone numbers outside of the organization—such as frequently called customers or vendors—so that they do not have to hang up after checking messages to place another call, or so that they do not incur long-distance charges while on business travel.

You can configure individual user or call handler greetings to allow callers to transfer to numbers that are not associated with Unity Connection users or call handlers. Alternatively, you can route callers to one of two “system transfer” conversations, both of which offer callers the ability to transfer to numbers that are not associated with Unity Connection users:

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|-------------------------------|--|
| <b>Caller System Transfer</b> | This conversation prompts callers to enter the number that they want to transfer to.<br>To help protect your organization from toll fraud and unauthorized use, Unity Connection performs the transfer only when the Default System Transfer restriction table permits it.   |
| <b>User System Transfer</b>   | This conversation prompts callers to sign in to Unity Connection. After callers enter their Unity Connection IDs and PINs, Unity Connection prompts them to enter the number that they want to transfer to.<br>To help protect your organization from toll fraud and unauthorized use, Unity Connection performs the transfer only when permitted by the transfer restriction table that is associated with the class of service for the user who signed in. |

You can route callers to either system transfer conversation in several ways, including:

- By creating a new phone number (on your phone system) and a corresponding routing rule to send callers to either system transfer conversation. When callers dial the number, Unity Connection sends calls to the system transfer conversation that you specify.
- By offering a system transfer as a “one-key dialing” option. You can specify either system transfer (on the Caller Input page for any call handler or user greeting) as the action that Unity Connection performs when a caller presses a particular key during the greeting.

For example, to allow all callers to transfer to a lobby phone, guest office, or a conference room from the Opening Greeting, you could set Unity Connection to offer Caller System Transfers when callers press 3. To offer system transfers to a particular user, you could set Unity Connection to offer User System Transfers when the user presses a particular key during the Opening Greeting or even while listening to his or her own greeting.

Regardless of how you offer callers either type of system transfer, as long as the number entered by the caller is allowed by the Default System Transfer restriction table, Unity Connection releases calls to the phone system, which handles the transfer to the specified number. This means that users and outside callers cannot return to the Unity Connection phone menus after the transfer takes place.

Follow the instructions in the applicable task list to set up Caller and User System Transfers:

- [Task List: Offering Caller System Transfers in Unity Connection, page 15-2](#)
- [Task List: Offering User System Transfers in Unity Connection, page 15-4](#)

When using either the Caller System Transfer or User System Transfer conversation, Unity Connection prompts users and callers to confirm the number that they enter before performing the transfer. To disable the confirmation prompt, change the System Transfers: Confirm Number Before Transfer setting on the System Settings > Advanced > Conversations page in Cisco Unity Connection Administration. For details, see the “Conversation Configuration” section in the “Cisco Unity Connection 9.x Advanced Settings” chapter of the *Interface Reference Guide for Cisco Unity Connection Administration Release 9.x*, at

[http://www.cisco.com/en/US/docs/voice\\_ip\\_comm/connection/9x/gui\\_reference/guide/9xcucgrgx.html](http://www.cisco.com/en/US/docs/voice_ip_comm/connection/9x/gui_reference/guide/9xcucgrgx.html)

## Task List: Offering Caller System Transfers in Unity Connection

1. Modify the Default System Transfer restriction table so that callers can dial numbers that you want to allow. See the “[Managing Restriction Tables in Cisco Unity Connection 9.x](#)” chapter for details on how restriction tables work and how to modify them.
2. Configure one of the following methods for callers to access system transfers:
  - Configure a greeting—Each user and call handler greeting can be enabled to allow system transfers. See the “[Configuring a Greeting to Allow System Transfers](#)” section on page 15-3.
  - Set up a one-key dialing option—Use caller input settings for a call handler to send callers to the Caller System Transfer conversation when they press the key that you specify during a call handler greeting. Then, enable caller input for the applicable greeting and rerecord the greeting to mention the key that callers can press in the call handler greeting (for example, “...to reach a conference room, press 3.”).

- Set up a “system transfers” phone number—See the documentation for the phone system to set up a new phone number. Then, on the Call Management > Call Routing > Direct Routing Rules page in Cisco Unity Connection Administration, create a routing rule that sends any call that arrives for the new number to the Caller System Transfer conversation. Distribute the new number to callers who will find Caller System Transfers convenient.

## Configuring a Greeting to Allow System Transfers

The easiest way to offer system transfers in your organization is to configure user and call handler greetings to allow system transfers. Do one of the following procedures:

- [To Configure an Individual Greeting to Allow System Transfers, page 15-3](#)
- [To Configure Multiple Greetings to Allow System Transfers in Bulk Edit Mode, page 15-3](#)

### To Configure an Individual Greeting to Allow System Transfers

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- Step 1** In Cisco Unity Connection Administration, go to the Greetings page for the applicable user, user template, call handler, or call handler template.
- Step 2** Select the applicable greeting.
- Step 3** On the Edit Greeting page, check the **Allow Transfers to Numbers Not Associated with Users or Call Handlers** check box.
- Step 4** Select **Save**.
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### To Configure Multiple Greetings to Allow System Transfers in Bulk Edit Mode

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- Step 1** On the Search Call Handlers or Search Users page, check the applicable call handler or user check boxes, and select **Bulk Edit**.

If the call handlers or users that you want to edit in bulk do not all appear on one Search page, check all applicable check boxes on the first page, then go to the next page and check all applicable check boxes, and so on, until you have selected all applicable call handlers or users. Then select **Bulk Edit**.

**Note** The Status message at the top of the page tells you how many call handlers or users are being edited. Also note that each page is populated only with the fields that you are allowed to edit in bulk mode.

- Step 2** On the Edit menu, select **Greetings**.
- Step 3** On the Greetings page, select the display name of the greeting that you want to modify.
- Step 4** On the Edit Greeting page, check the left-most check box to select the **Allow Transfers to Numbers Not Associated with Users or Call Handlers** field, and then check the check box.
- Step 5** If applicable, set the Bulk Edit Task Scheduling Fields to schedule the Bulk Edit operation for a later date and/or time.
- Step 6** Select **Submit**.
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## Task List: Offering User System Transfers in Unity Connection

1. For the users who will use User System Transfers, modify the transfer restriction table that is associated with the user class of service so that the users can dial numbers that are not associated with Unity Connection entities. See the [“Managing Restriction Tables in Cisco Unity Connection 9.x”](#) chapter for details on how transfer restriction tables work and how to modify them to allow the numbers you want.

**Tip**

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If you are not offering system transfers to all users in a single class of service, reassign applicable users to a new class of service that has a transfer restriction table that allows them to dial the applicable numbers.

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2. Configure one of the following methods for callers to access system transfers:
  - Configure a Custom Keypad Mapping conversation—Use the Custom Keypad Mapping tool to map a key to the User System Transfer Conversation so that it is offered to users from the main menu. See the [“Custom Keypad Mapping Tool in Cisco Unity Connection 9.x”](#) chapter for details.
  - Set up a one-key dialing option—Use caller input settings for a call handler or a user greeting to send callers to the User System Transfer conversation when they press the key that you specify during the greeting. Then, enable caller input for the applicable greeting. Tell users which key to press to access the User System Transfer conversation when they listen to the greeting, or if you are not concerned about other callers hearing the option and not being able to use it, rerecord the greeting to mention the key. (For example, “...to reach a conference room, press 3.”)
  - Set up a “system transfers” phone number—See the documentation for the phone system to set up a new phone number. Then, on the Call Management > Call Routing > Direct Routing Rules page in Cisco Unity Connection Administration, create a routing rule that sends any calls for the new number to the User System Transfer conversation. Distribute the new number only to the users who will use User System Transfers.