



CHAPTER 4

User Orientation

See the following sections:

- [Orientation Task List, page 4-1](#)
- [Settings That Users Can Change, page 4-3](#)

Orientation Task List

Revised May 2009

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 Connection. If you are planning supplemental Connection training, also consider reviewing the potential user concerns and misconceptions listed in the “[Support Desk Orientation](#)” section on [page 5-2](#).

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 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 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 logging on to Connection. The Wallet Card wizard is a Windows-based remote database administration tool. Download the tool and view Help at http://www.ciscounitytools.com/App_CUC_WalletCardWizard.htm.

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 Assistant Web Tool*
 - *User Guide for the Cisco Unity Connection Inbox Web Tool*
 - *User Guide for Accessing Cisco Unity Connection Voice Messages in an E-Mail Application*
 - *User Guide for the Cisco Unity Connection Personal Call Transfer Rules Web Tool*

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, click the link for the topics you want, and print the PDF files.)

3. Give users the phone numbers that they dial to access 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 Connection.
4. Give users the URL to the Cisco PCA website: `http://<Cisco Unity Connection server name>/ciscopca`.
5. Give users the name, extension, and/or email address of the Connection administrator and any support desk contact information.
6. 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 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 Passwords and Security Guidelines

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

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

8. Provide users with their initial Cisco PCA passwords. Users must use the Cisco Unity Assistant to change their Cisco PCA passwords.
9. Explain to users how to secure their phone and Cisco PCA passwords so that they adequately protect their Connection mailboxes from unauthorized access. Detail the security guidelines for your organization. Encourage users to enter secure passwords whenever they change their passwords.
10. Make sure users understand that their Cisco PCA passwords are not related to their Connection phone passwords, nor are the passwords synchronized. Users may assume that their phone and Cisco PCA passwords are the same. As a result, they may think that they are changing both passwords when the Connection conversation prompts them to change their phone password 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

11. Make sure that users know that they need to complete first-time enrollment by phone. They do not need to refer to any Connection documentation during enrollment. 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 log on to Connection.

The “Enrolling as a Cisco Unity Connection User” chapter of the *User Guide for the Cisco Unity Connection Phone Interface* details the tasks that users are asked to complete as part of enrollment.

Explain How Connection Features and Functionality Work

12. Provide training on how to personalize user settings by using the phone and the Cisco Unity Assistant, as summarized in [Table 4-1](#). In particular, users may benefit from a hands-on demonstration of the Cisco Unity Assistant, as they may not be accustomed to using a web interface to set voice messaging options.

13. Provide training on how to use the Cisco Unity Personal Call Transfer Rules web tool, and how call transfers, call holding and screening, and caller options are used, as summarized in [Table 4-2](#).
Users can refer to the *User Guide for the Cisco Unity Connection Personal Call Transfer Rules Web Tool* or to Cisco Unity Personal Call Transfer Rules Help for further guidance after orientation.
14. Explain how full mailboxes work with Connection. See the “[Support Desk Orientation](#)” section on [page 5-2](#) for issues that users may encounter. Refer users to the appropriate user guides for similar information.
15. If your organization has users who will use RSS readers to access voice messages, provide training on using RSS with Connection. See the “[Configuring Access to RSS Feeds of Voice Messages](#)” section in the “Messaging” chapter of the *System Administration Guide for Cisco Unity Connection* for details.
16. If your organization has users who will use TTY and the TTY prompt set, provide training on using TTY with Connection.
17. Make sure that users who own call handlers or system distribution lists understand their responsibilities (if applicable).
18. As applicable, tell users how to use the Cisco Unity Greetings Administrator and System Broadcast Administrator.

Settings That Users Can Change

Revised May 2009

See the following tables:

- [Settings That Users Can Change By Using the Cisco Unity Assistant and the Phone Menus](#)
- [Settings That Users Can Change By Using the Cisco Unity Personal Call Transfer Rules Web Tool and the Phone Menus](#)

Table 4-1 **Settings That Users Can Change By Using the Cisco Unity Assistant and the Phone Menus**

Settings That Can Be Changed by Using the Cisco Unity Assistant	Settings That Can Be Changed by Using the Phone Menus
Call Holding and Screening ¹ : • Select how 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 Connection handles indirect calls, including telling the user who the call is for, announcing that Connection is transferring the call, prompting the user to accept or refuse a call, and prompting callers to say their names	Call Holding and Screening ¹ : • None

Table 4-1 *Settings That Users Can Change By Using the Cisco Unity Assistant and the Phone Menus (continued)*

Settings That Can Be Changed by Using the Cisco Unity Assistant	Settings That Can Be Changed by Using the Phone Menus
Call Transfers²: • 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	Call Transfers²: • 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
Caller Options: • Allow callers to edit messages • Allow callers to mark messages urgent	Caller Options: • None
Phone Menu Options: • Set language for 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 Connection conversation menus • Select the action that Connection performs when the user calls Connection, including greeting the user by name, and announcing the number of new messages by type • Specify alternate extensions	Phone Menu Options: • Select full or brief Connection conversation menus
Greetings: • Record a personal greeting • Enable or disable greeting • Specify an expiration date for an enabled greeting • Switch between system prompt and personal greeting	Greetings: • Record a personal greeting • Enable or disable greeting • Specify an expiration date for an enabled greeting

Table 4-1 *Settings That Users Can Change By Using the Cisco Unity Assistant and the Phone Menus (continued)*

Settings That Can Be Changed by Using the Cisco Unity Assistant	Settings That Can Be Changed by Using the Phone Menus
Message Notification: • Enable or disable a notification device • Specify dialing or recipient options • Select the types of messages and message urgency for which Connection generates a notification • Specify a list of message senders (by user name or calling phone number) for which Connection generates a notification • Set up a notification schedule, and specify what happens when a device does not answer, is busy, or fails	Message Notification: • Enable or disable a notification device, and change its number
Message Playback: • Specify the speed and volume of messages that are played by phone • Specify message playback order • Change the time format used for message time stamps • Specify whether Connection plays the Message Type menu • Select the action that Connection performs when messages are played, including announcing the name and number of the sender who left a message, and whether the timestamp is played before or after the message • Specify that messages are marked saved upon hang-up or disconnect • Specify whether Connection asks to confirm deletions of new and saved messages	Message Playback: • Speed and volume of message as it is played
Message Sending and Addressing: • Specify that Connection prompts to confirm message recipients by name • Specify that Connection prompts to continue adding names after each recipient • Specify that 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)	Message Addressing: • Switch between addressing to other users by name or by extension (by pressing ##)³ • Review, add, or remove names in the addressing priority list⁴

Table 4-1 *Settings That Users Can Change By Using the Cisco Unity Assistant and the Phone Menus (continued)*

Settings That Can Be Changed by Using the Cisco Unity Assistant	Settings That Can Be Changed by Using the Phone Menus
Personal Settings: - Record a name - Specify alternate names - Change directory listing status - Change password	Personal Settings: - Record a name - Change directory listing status - Change password - 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
Private Lists: - Enter a display name - Record a list name - Add and delete members	Private Lists: - Record a list name - Add and delete members
Personal Contacts: Set up an address book of personal contacts to use for both name dialing and call transfer rules	Personal Contacts: None

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. 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. Note that this depends on whether you have enabled spelled name addressing.
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.

Table 4-2 *Settings That Users Can Change By Using the Cisco Unity Personal Call Transfer Rules Web Tool and the Phone Menus*

Settings That Can Be Changed by Using the Cisco Unity Personal Call Transfer Rules Web Tool	Settings That Can Be Changed by Using the Phone Menus
Call Holding and Screening: - Set up personal call transfer rules to specify how 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 Connection handles direct and indirect calls, including telling the user who the call is for, announcing that Connection is transferring the call, prompting the user to accept or refuse a call, and prompting callers to say their names	Call Holding and Screening: None

Table 4-2 *Settings That Users Can Change By Using the Cisco Unity Personal Call Transfer Rules Web Tool and the Phone Menus (continued)*

Settings That Can Be Changed by Using the Cisco Unity Personal Call Transfer Rules Web Tool	Settings That Can Be Changed by Using the Phone Menus
Call Transfers: Set up personal call transfer rules to transfer direct and indirect calls to an extension, to an external phone number, or to the greeting	Call Transfers: - 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 voice mail or to another phone number - Forward all incoming calls directly to Connection, rather than to phone extension
Caller Options: - Allow callers to edit messages - Allow callers to mark messages urgent	Caller Options: None
Destinations: - 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 Connection waits before transferring the call to the next destination or to voice mail	Destinations: None
Caller Groups Create groups of personal contacts, system contacts, or Connection users to use in personal call transfer rules	Caller Groups None

