



Overview of Mandatory Tasks for Installing a Cisco Unity Connection 1.x System

Use the following high-level task list to install the Cisco Unity Connection 1.x system correctly. The tasks reference detailed instructions in the *Cisco Unity Connection Installation Guide* and in other Connection documentation as noted. Follow the documentation for a successful installation.

The task list leads you through the complete installation of the Cisco Unity Connection system—from installing and configuring the Connection server; to populating the Connection system with user and call management data; to setting up optional features, such as using IMAP clients to access voice messages; to backing up Connection data.

The list is divided into seven parts:

- [Part 1: Installing and Configuring the Cisco Unity Connection Server, page 1-1](#)
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Some of the tasks apply only to specific situations, and are noted as such. If a task does not apply to your situation, skip it.

We recommend that you check off tasks as you complete them.

Part 1: Installing and Configuring the Cisco Unity Connection Server

The tasks in Part 1 reference chapters in the *Cisco Unity Connection Installation Guide*, unless otherwise noted.

1. Verify the following requirements:
 - a. System requirements for the Cisco Unity Connection 1.x system. See *Cisco Unity Connection 1.x System Requirements, and Supported Hardware and Software* at http://www.cisco.com/en/US/products/ps6509/prod_installation_guides_list.html.

- b. Requirements for integrating the phone system(s). See the “Requirements” section of the applicable Cisco Unity Connection integration guide(s) at http://www.cisco.com/en/US/products/ps6509/products_installation_and_configuration_guides_list.html.
2. Gather the documentation and tools for the installation, and download the software required for the installation. See the “[Preparing for the Installation](#)” chapter.
3. Set up or program the phone system(s) and extensions to enable the integration(s) with Cisco Unity Connection. See the “Programming the <Name> Phone System” section of the applicable Cisco Unity Connection integration guide(s), http://www.cisco.com/en/US/products/ps6509/products_installation_and_configuration_guides_list.html.
4. Set up and configure the Cisco Unity Connection server, install and configure Microsoft Windows Server 2003 (if applicable), and obtain license files. See the “[Setting Up and Configuring the Server, and Obtaining License Files](#)” chapter.
5. Install the latest Microsoft service packs and updates, Cisco Security Agent for Cisco Unity, antivirus software, and Cisco Unity Connection; and configure TCP/IP properties, connect the server to the network, and verify the IP address and the network connection. See the “[Installing Software and Configuring TCP/IP Properties](#)” chapter.
6. Configure Cisco Unity Connection software or voice-recognition software, install a service release (if applicable), test the phone system integration, and exclude selected directories from antivirus scanning (if applicable). See the “[Configuring Software on the Server, and Installing a Service Release](#)” chapter.
7. Install optional software on the Cisco Unity Connection server. See the “[Installing Optional Software](#)” chapter.
8. *If any users will have access to the Cisco Unity web tools or will use an IMAP e-mail client to access Connection voice messages:* Secure Cisco Personal Communications Assistant (PCA) and IMAP access to Connection. See the “[Securing Cisco PCA and IMAP E-Mail Client Access to Cisco Unity Connection](#)” chapter.
9. *If users will have access to their Exchange e-mail by using text to speech (TTS):* Configure access to Exchange e-mail for use with TTS. See the “[Configuring Access to Exchange E-Mails Through TTS](#)” chapter.
10. *If users will be allowed to base personal call transfer rules on Exchange calendar and contact information:* Configure access to Exchange calendars and contacts. See the “[Configuring Access to Exchange Calendars and Contacts for Personal Call Transfer Rules](#)” chapter.
11. If you are not installing a separate voice-recognition server, store all of the software that was shipped with Cisco Unity Connection together in a location that is safe and can be readily accessed. You may need the discs later to upgrade or to otherwise modify the Connection system, or Cisco TAC may require you to access them during a service call.

**Caution**

Do not lose the DVD case that contains Cisco Unity Connection and Cisco Platform Configuration discs. After you install or reinstall Windows Server 2003 on some supported servers, you must activate Windows by entering the product key that appears on the Certificate of Authenticity, which is attached to the case.

Part 2: Installing and Configuring a Separate Voice-Recognition Server (Optional)

The tasks in Part 2 reference chapters in the *Cisco Unity Connection Installation Guide*, unless otherwise noted.

12. Set up and configure the voice-recognition server, and install and configure Windows Server 2003 (if applicable). See the “[Setting Up and Configuring the Server, and Obtaining License Files](#)” chapter.
13. Install the latest Microsoft service packs and updates, Cisco Security Agent for Cisco Unity, antivirus software, and Cisco Unity Connection voice-recognition software; and configure TCP/IP properties, connect the server to the network, and verify the IP address and the network connection. See the “[Installing Software and Configuring TCP/IP Properties](#)” chapter.
14. Configure software on the voice-recognition server. See the “[Configuring Software on the Server, and Installing a Service Release](#)” chapter.
15. Install optional software on the voice-recognition server. See the “[Installing Optional Software](#)” chapter.
16. Store all of the software that was shipped with Cisco Unity Connection together in a location that is safe and can be readily accessed. You may need the discs later to upgrade or to otherwise modify the Cisco Unity Connection system, or Cisco TAC may require you to access them during a service call.



Caution

Do not lose the DVD case that contains Cisco Unity Connection and Cisco Platform Configuration discs. After you install or reinstall Windows Server 2003 on some supported servers, you must activate Windows by entering the product key that appears on the Certificate of Authenticity, which is attached to the case.

Part 3: Populating the Cisco Unity Connection System with User and Call Management Data

You do many of the tasks in Part 3 by using Cisco Unity Connection Administration. (For information on logging on to Connection Administration and on using it, see the “[Accessing and Using Cisco Unity Connection Administration](#)” appendix of the *Cisco Unity Connection System Administration Guide*.)

The tasks in Part 3 reference chapters in the *Cisco Unity Connection System Administration Guide* and the *Cisco Unity Connection User Moves, Adds, and Changes Guide*, as noted.

17. Confirm that you have the applicable licenses.
18. Familiarize yourself with the following Cisco Unity Connection concepts:
 - a. Call management. See the “[Call Management Overview](#)” and “[Creating a Call Management Plan](#)” chapters of the *Cisco Unity Connection System Administration Guide*.
 - b. User and administrator accounts. See the “[Introduction to Cisco Unity Connection Users, Contacts, Default Accounts, and Default System Distribution Lists](#)” and “[Preparing to Add User Accounts](#)” chapters of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - c. The Connection conversation. See the “[Cisco Unity Connection Conversation](#)” chapter of the *Cisco Unity Connection System Administration Guide*.

19. Develop a system plan:
 - a. Identify business and nonbusiness hours, and holidays. See the “Managing Schedules and Holidays” chapter of the *Cisco Unity Connection System Administration Guide*.
 - b. Map out a call management plan. See the “Creating a Call Management Plan” chapter of the *Cisco Unity Connection System Administration Guide*.
 - c. Review the default restriction tables, and determine whether changes or new tables are needed. See the “Overview: Default Restriction Tables” section in the “Managing Restriction Tables” chapter of the *Cisco Unity Connection System Administration Guide*.
 - d. Determine password and account lockout policies for phone and web-tool access, and the logon policy for web-tool access. See the “Authentication Rules” section in the “Preparing to Add User Accounts” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - e. Determine the number and types of administrator accounts that you need, and the roles to assign to the accounts. See the “Roles” section in the “Preparing to Add User Accounts” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - f. Determine the features that you will enable for users. See the “Setting Up Features and Functionality That Are Controlled by User Account Settings” and “Setting Up Features and Functionality That Are Controlled by Class of Service” chapters of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - g. Review the default classes of service (COS), and determine whether changes or new COSes are needed. See the “Class of Service” section in the “Preparing to Add User Accounts” chapter and the “Setting Up Features and Functionality That Are Controlled by Class of Service” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - h. Review the default system distribution lists, and determine whether changes or new distribution lists are needed. See the “Managing System Distribution Lists” chapter of the *Cisco Unity Connection System Administration Guide*.
 - i. Review the default message aging policy, and determine whether changes are needed. See the “Message Aging Policy” chapter of the *Cisco Unity Connection System Administration Guide*.
 - j. Review the default message store quotas, and determine whether changes are needed. See the “Mailbox Size Quotas” section in the “Setting Up Features and Functionality That Are Controlled by User Account Settings” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - k. Review the default user templates and determine whether changes or new templates are needed. See the “Templates” section in the “Preparing to Add User Accounts” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
20. For the following defaults that you reviewed in Task 19., make changes or create new ones, as applicable:
 - a. Schedules. See the “Managing Schedules and Holidays” chapter of the *Cisco Unity Connection System Administration Guide*.
 - b. Restriction tables. See the “Managing Restriction Tables” chapter of the *Cisco Unity Connection System Administration Guide*.
 - c. Authentication rules. See the “Authentication Rules” section in the “Preparing to Add User Accounts” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - d. Classes of service. See the “Adding, Modifying, or Deleting a Class of Service” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - e. System distribution lists. See the “Managing System Distribution Lists” chapter of the *Cisco Unity Connection System Administration Guide*.

- f. Message aging policy. See the “Message Aging Policy” chapter of the *Cisco Unity Connection System Administration Guide*.
 - g. User templates. See the “Adding, Modifying, or Deleting a User Template” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
21. Test the system configuration:
- a. Add a single user. See the “Adding an Individual User Account by Using Cisco Unity Connection Administration” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
 - b. Use the phone to log on to Cisco Unity Connection as the test user, record a name, and set a phone password. Hang up.
 - c. Call Cisco Unity Connection and log on as the test user again to confirm that the password, greeting, and conversation version specified for the user are working properly. Confirm that the user inherited the correct class of service by testing any applicable features by phone.
 - d. Log on to the Cisco Personal Communications Assistant (PCA) as the test user. If you gave the test user the required COS rights, confirm that you can browse from the Cisco PCA Home page to the Cisco Unity Assistant, the Cisco Unity Inbox, and the Cisco Unity Personal Call Transfer Rules web tools.
 - e. Make corrections to the system configuration as necessary.
22. Create administrator accounts. See the “Adding an Individual User Account by Using Cisco Unity Connection Administration” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
23. Create user accounts. See the “Adding an Individual User Account by Using Cisco Unity Connection Administration,” “Managing Multiple User Accounts with the Cisco Unity Connection Bulk Administration Manager,” or “Creating Multiple User Accounts from Cisco CallManager Users” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*, as applicable.
24. Customize individual user account settings, as needed. See the “Modifying or Deleting an Individual User Account by Using Cisco Unity Connection Administration” or “Managing Multiple User Accounts with the Cisco Unity Connection Bulk Administration Manager” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*, as applicable.
25. Add individual users to system distribution lists, as needed. See the “Managing System Distribution List Members” section in the “Managing System Distribution Lists” chapter of the *Cisco Unity Connection System Administration Guide*.
26. As applicable, set up and enable message notification for users. See the “Setting Up Message Notification” chapter of the *Cisco Unity Connection System Administration Guide*.
27. *If users will be allowed to base personal call transfer rules on Exchange calendar and contact information:* Confirm—and, if necessary, modify—a class-of-service setting, and create a Cisco Unity Connection external service account for each user who is allowed to base personal call transfer rules on their calendar and contacts. For more information, see the “Personal Call Transfer Rules” section in the “Setting Up Features and Functionality That Are Controlled by Class of Service” chapter of the *Cisco Unity Connection User Moves, Adds, and Changes Guide*.
28. As applicable, set up and enable secure messaging for users. See the “Secure Messaging Overview” section in the “Setting Up Private and Secure Messaging” chapter of the *Cisco Unity Connection System Administration Guide*.
29. Implement, then test the call management plan you created in Task 19.b.:
- a. Create call handlers. See the “Managing Call Handlers” chapter of the *Cisco Unity Connection System Administration Guide*.

- b. Specify directory handler settings. See the “Managing Directory Handlers” chapter of the *Cisco Unity Connection System Administration Guide*.
- c. Create interview handlers. See the “Managing Interview Handlers” chapter of the *Cisco Unity Connection System Administration Guide*.
- d. Set up call routing. See the “Managing Call Routing Tables” chapter of the *Cisco Unity Connection System Administration Guide*.

Part 4: Setting Up Administrator and User Workstations

The tasks in Part 4 reference chapters in the *Cisco Unity Connection System Administration Guide* and the *Cisco Unity Connection User Setup Guide*, as noted.

- 30. Set up administrator workstations, and provide access to the Cisco Unity Greetings Administrator and the Cisco Unity Connection Broadcast Message Administrator, as applicable:
 - a. Configure the browser(s) on administrator workstations to access Cisco Unity Connection web applications. See the “Configuring the Browser(s) on an Administrator Workstation to Access Cisco Unity Connection Web Applications” section in the “Accessing and Using Cisco Unity Connection Administration” appendix of the *Cisco Unity Connection System Administration Guide*.
 - b. Set up the Cisco Unity Greetings Administrator, and provide access to the applicable administrators and users. See the “Setting Up the Cisco Unity Greetings Administrator” section in the “Managing Recorded Greetings and Recorded Names” chapter of the *Cisco Unity Connection System Administration Guide*.
 - c. Set up the Broadcast Message Administrator, and provide access to the applicable administrators and users. See the “Setting Up Broadcast Messaging” chapter of the *Cisco Unity Connection System Administration Guide*.
- 31. Set up user workstations, as applicable:
 - a. Set up access to the Cisco PCA. See the “Setting Up Access to the Cisco Personal Communications Assistant” chapter of the *Cisco Unity Connection User Setup Guide*.
 - b. Set up Media Master playback and recording devices. See the “Setting Up Playback and Recording Devices for the Media Master” chapter of the *Cisco Unity Connection User Setup Guide*.
 - c. Configure IMAP e-mail accounts to access Connection voice messages. See the “Configuring an E-Mail Account to Access Cisco Unity Connection Voice Messages” in the *Cisco Unity Connection User Setup Guide*.
 - d. Set up user phones. See the “Setting Up User Phones” chapter of the *Cisco Unity Connection User Setup Guide*.
 - e. Confirm that users are able to access and use the Connection features that have been enabled for them.

Part 5: Customizing the Cisco Unity Connection Conversation

- 32. Make changes to the Cisco Unity Connection conversation, as applicable. See the “Changing Conversation Settings” chapter of the *Cisco Unity Connection System Administration Guide*.

Part 6: Backing Up Cisco Unity Connection Data

33. Back up Connection data by using the Cisco Unity Connection Disaster Recovery Backup tool, which is available in the Administration Tools section of the Cisco Unity Tools Depot (double-click the Cisco Unity Tools Depot icon on the Connection server desktop). See DiRT Help in the Tools Depot.

Third-party backup applications are not supported.

Part 7: Training

34. Train users, operators, and support desk personnel to use the Cisco Unity Connection system. See the “User Orientation” and “Operator and Support Desk Orientation” chapters of the *Cisco Unity Connection User Setup Guide*.

