



CHAPTER 2

Preparing to Add User Accounts

Before you add user accounts individually or in bulk, you need to select and define a template and class of service (COS) for each type of account you plan to add. Templates and classes of service contain settings that determine which features are available to Cisco Unity Connection users and their callers, and define limits and permissions for using Connection.

For administrator accounts, you also need to select and define a template. A COS is not associated with administrator accounts. Instead, to determine which tasks administrators can do, you need to select the roles that will be assigned to each account.

The following sections in this chapter provide further information on templates, classes of service, and roles that will help you prepare to add user and administrator accounts in Connection:

- [Templates, page 2-1](#)
- [Class of Service, page 2-2](#)
- [Roles, page 2-2](#)

Templates

Each user and administrator account that you add in Cisco Unity Connection is based on a user template. Settings from the template are applied to the accounts as the accounts are created. Connection includes predefined templates, which you can modify. You can also create new templates.

Before you create the accounts, review the settings in the template(s) that you plan to use and determine whether you need to make changes or create new templates. For each template, you will want to consider which features you want to enable, specify a class of service, set a schedule and time zone, and select the authentication rule that will dictate the password and account lockout policy for the accounts that you create. (Changes to template settings do not affect existing user accounts.)



Tip

To minimize the number of modifications that you will need to make to individual accounts later, use a separate template to specify settings that are applicable for each group of users that you plan to create. For example, if you plan to create accounts for the members of a sales department, create or modify an existing template to set up message notifications, specify that messages left for the sales employees will be encrypted for extra security, increase the length of messages that callers can leave, and make similarly appropriate changes to settings that control the Connection conversation that the sales employees hear.

If a particular setting must be unique for each user account, leave that setting blank on the user template, and then you can modify the setting for each account after the accounts are created.

For instructions on creating or modifying user templates, see the [“Adding, Modifying, or Deleting a User Template”](#) chapter. Review the [“Setting Up Features and Functionality That Are Controlled by User Account Settings”](#) chapter to learn about the settings that affect how users interact with Connection.

Class of Service

Before you add user accounts, review the class of service (COS) specified for the template that you plan to use to determine whether you need to modify it, specify a different COS, or create a new one. Because a COS defines limits and permissions for using Cisco Unity Connection, its settings should be appropriate for the group of users that you are adding. For example, a COS:

- Controls access to features, such as Text to Speech e-mail or live reply.
- Controls how users interact with Connection. For example, a COS dictates the maximum length of user messages and greetings, whether users can choose to be listed in directory assistance, and whether users can send messages to a system distribution list.
- Specifies the restriction table used to control the phone numbers that users can use for message notification, call transfer, and other tasks.

Keep in mind that if you change the COS that is specified on a user template page, any user accounts that have already been created based on that template are not reassigned to the new COS. In contrast, when you modify the settings in a COS, the changes affect both new and existing members, so you can update COS settings before and after you create user accounts. You can also reassign a user to a different COS at any time.

For instructions on creating or modifying classes of service, see the [“Adding, Modifying, or Deleting a Class of Service”](#) chapter. You can learn about the settings that make up each COS by reviewing the [“Setting Up Features and Functionality That Are Controlled by Class of Service”](#) chapter.

Roles

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Connection offers levels of privileges for administrator accounts, set according to a list of predefined roles. Roles specify which tasks administrators can do. Before you add administrator accounts, select the roles that will be assigned to each account. You can change which roles are assigned to the accounts at any time.

Connection comes with the following predefined roles. To see the specific privileges for each administrator role, go to System Settings > Roles and click the name of each role. You cannot make changes to the permissions that are associated with each predefined role.

Audio Text Administrator	This role allows an administrator to manage call handlers, directory handlers, and interview handlers.
Greeting Administrator	This role allows an administrator to access the Cisco Unity Greetings Administrator, a Connection phone conversation which allows users to manage the recorded greetings for call handlers over the phone. Note You will need to assign this role to a User with Voice Mailbox account because the administrator must be able to access Connection by phone.

Help Desk Administrator	This role allows an administrator to reset user passwords and unlock user accounts, and view user setting pages.
Remote Administrator <i>(in Cisco Unity Connection release 2.1 and later only)</i>	This role allows an administrator to administer the database by using remote tools. It includes the same privileges as the System Administrator role.
System Administrator	<p>This is the top-level administration role. This role allows access to all administrative functions, including all user and system settings, all reports, and all administration and diagnostic tools.</p> <p>The default administrator account that the installer specified during initial setup of Connection is set to this role.</p> <p>A System Administrator is the only role that has permission to create administrative accounts.</p>
Technician	This role allows an administrator access to all functions that enable management of the Connection server and phone system integration settings; administrators with this role can also run all reports, use diagnostic tools, and view all system and user settings pages.
User Administrator	This role allows an administrator to manage user accounts, access all user administration functions, run user-related reports, and use user administration tools.

**Note**

While you can assign roles to users with voice mailboxes, we do not recommend it except when allowing access to the Cisco Unity Greetings Administrator. As a best practice, make sure that administrators have two accounts: one without a voice mailbox for administering Connection and another with a voice mailbox that they can use to access their personal mailbox.

