



Overview of Mandatory Tasks for Installing Cisco Unity

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

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.

Part 1: Installing and Configuring the Cisco Unity Server

The tasks in Part 1 reference sections in the “[Installing the Cisco Unity System](#)” chapter of the *Cisco Unity Installation Guide*, unless otherwise noted.

If the Cisco Unity system will use the failover feature, begin the installation on the primary server. The task list alerts you when to install the secondary server. Both Cisco Unity servers must have the same enabled features and configurations.



Note

Failover: If you are installing the secondary Cisco Unity server now, skip Task 1.

1. Gather the documentation and tools you need for the installation. See the “[Installation Checklist](#)” section on page 2-2.



Note

Failover: If you are installing the secondary Cisco Unity server now, skip Task 2.

2. Verify system requirements for the Cisco Unity 3.1 system. Refer to *Cisco Unity 3.1 System Requirements, and Supported Hardware and Software* on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_pre_installation_guides_list.html.



Note

Failover: If you are installing the secondary Cisco Unity server now, skip Task 3.

3. Confirm that a Cisco Unity activation code is available (the code is provided when the software is registered). If the Information Services manager has not already registered Cisco Unity, do so now. See the “[Cisco Unity Activation Code](#)” section on page 2-3.

4. Determine the drive locations for application, log, and database files that you will need later in the installation. If the system is using failover, the file locations must be the same on the primary and secondary servers. See the “[Determining the Drive Locations for Files on the Cisco Unity System](#)” section on page 2-4.

**Note**

Failover: If you are installing the secondary Cisco Unity server now, skip Task 5.

5. Set up or program the phone system(s) and extensions to enable the integration(s) with Cisco Unity. Refer to the “Programming the Phone System” section of the applicable Cisco Unity integration guide.
6. *With circuit-switched phone systems only:* Install voice cards. See the “[Installing Voice Cards](#)” section on page 2-7.
7. Set up the Cisco Unity server. See the “[Setting Up the Cisco Unity Server](#)” section on page 2-9.
8. *If the system is using RAID:* Configure the RAID arrays. See the “[Configuring the RAID Arrays](#)” section on page 2-10.
9. Install the applicable version of Microsoft Windows 2000. See the “[Installing Windows 2000 Server or Windows 2000 Advanced Server](#)” section on page 2-12.
10. *If the Cisco Unity server was not purchased from Cisco:* Set up the logical drives according to the storage configuration requirements for the platform. See the “[Setting Up the Logical Drives \(If the Cisco Unity Server Was Not Purchased from Cisco\)](#)” section on page 2-18. (Note that a Cisco Unity server purchased from Cisco was shipped with Platform Configuration discs that automatically set up the logical drives when you used the discs to install Windows 2000.)
11. *If the Cisco Unity server was not purchased from Cisco or if the Platform Configuration discs are earlier than revision 11:* Install Windows 2000 Server Service Pack 3. See the “[Installing Windows 2000 Server Service Pack 3 \(Selected Systems\)](#)” section on page 2-19. (For more information on Platform Configuration discs, including the software installed by each version and how to identify a revision G disc, refer to *Components and Software Installed by the Cisco Unity Platform Configuration Discs and the Cisco Unity System Preparation Assistant*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_pre_installation_guides_list.html.)
12. *If the operating system was installed by using the Platform Configuration discs or was installed by using the manufacturer’s guided system-setup utility before the voice cards were installed:* Disable the Found New Hardware wizard. See the “[Disabling the Found New Hardware Wizard for the Voice Cards \(If Applicable\)](#)” section on page 2-19.
13. Install the IIS hot fix. See the “[Installing the IIS Hot Fix](#)” section on page 2-20.
14. *If you want the system to be connected to the network:* Connect the server to the network. See the “[Connecting the Cisco Unity Server to the Network](#)” section on page 2-20.
15. *If the system has a network connection and if the Cisco Unity server contains dual NICs:* Configure the NICs. See the “[Configuring Dual NICs in the Cisco Unity Server](#)” section on page 2-20.
16. *If the system has a network connection:* Assign a static IP address to the Cisco Unity server or reserve an IP address in DHCP. See the “[Assigning a Static IP Address or Reserving an IP Address in DHCP](#)” section on page 2-21.
17. *If the system has a network connection:* Confirm that the server has a valid IP address and is connected to the network. See the “[Verifying the IP Address and the Network Connection](#)” section on page 2-22.

18. *If the system key is a USB key and if the Cisco Unity server was not purchased from Cisco:* Install the driver for the key, and attach the USB key to the server. See the “[Installing the USB Key Driver and Attaching the USB System Key \(Selected Systems\)](#)” section on page 2-23.
19. Install Microsoft Active Directory, or add the Cisco Unity server to an existing domain. See the “[Installing Active Directory or Adding the Cisco Unity Server to an Existing Domain](#)” section on page 2-24.
20. Install Microsoft SQL Server 2000 or Microsoft SQL Server 2000 Desktop Engine (MSDE 2000). See the “[Installing SQL Server 2000 or MSDE 2000](#)” section on page 2-25.
21. Install Microsoft Internet Explorer 5.5 and Service Pack 2. See the “[Installing Internet Explorer 5.5 with Service Pack 2](#)” section on page 2-29.
22. Install Microsoft Message Queuing 2.0. See the “[Installing Message Queuing 2.0](#)” section on page 2-29.
23. *If the system is using Exchange 2000:* Install the NNTP and SMTP services. See the “[Installing the NNTP and SMTP Services \(Exchange 2000 Only\)](#)” section on page 2-30.
24. Install MSXML3 and MSXML3 Service Pack 1. See the “[Installing MSXML3 and MSXML3 Service Pack 1](#)” section on page 2-30.
25. On the Cisco Unity server, install Microsoft Exchange 2000 Server or Exchange Server 5.5, or install the corresponding administration software. See the applicable section:
 - “[Installing Exchange, Including Administration Software, on the Cisco Unity Server \(Selected Configurations Only\)](#)” section on page 2-31.
 - “[Installing Only Exchange Administration Software on the Cisco Unity Server](#)” section on page 2-35.

Note that installing Exchange on the Cisco Unity server is required for the Voice Messaging Only configuration when there is no network connection. For all other Cisco Unity configurations, you may install Exchange on the Cisco Unity server or connect Cisco Unity with an Exchange server that is in the same domain as the Cisco Unity server. If you connect Cisco Unity with an Exchange server, install only the Exchange administration software on the Cisco Unity server.

With failover, do not install Exchange on either of the Cisco Unity servers. Install only the Exchange administration software on the servers.

**Note**

Failover: If you are installing the secondary Cisco Unity server now, skip Task 26.

26. *If the system is using Exchange 2000:* Extend the Active Directory schema. See the “[Extending the Active Directory Schema for Cisco Unity \(Exchange 2000 Only\)](#)” section on page 2-37.
27. *If the Cisco Unity server was not purchased from Cisco or if the Platform Configuration discs are earlier than revision G:* Install Windows Terminal Services or Symantec pcAnywhere version 10 or later. See the “[Installing Windows Terminal Services or pcAnywhere \(Selected Systems\)](#)” section on page 2-38. (For more information on Platform Configuration discs, including the software installed by each version and how to identify a revision G disc, refer to *Components and Software Installed by the Cisco Unity Platform Configuration Discs and the Cisco Unity System Preparation Assistant*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_pre_installation_guides_list.html.)
28. Install and configure virus-scanning software, if applicable. See the “[Installing Virus-Scanning Software and Excluding from Scanning the Directory in Which Cisco Unity Is Installed](#)” section on page 2-41.

29. Install Cisco IDS Host Sensor Agent on the Cisco Unity server, and configure Cisco IDS Host Sensor, if applicable. See the [“Installing Cisco IDS Host Sensor Agent and Configuring Cisco IDS Host Sensor”](#) section on page 2-42.
30. Install any supported optional third-party software, if applicable. See the [“Installing Other Optional Software”](#) section on page 2-43.
31. *If the Cisco Unity server was not purchased from Cisco:* Change Windows Explorer settings so all files and folders are visible. See the [“Changing Windows Explorer Settings \(Selected Systems\)”](#) section on page 2-43.

**Note**

Failover: If you are installing the secondary Cisco Unity server now, skip Task 32.

32. *If the system is using Exchange 2000:* Create Active Directory organizational units for users and distribution lists, and a mailbox store, if applicable. See the [“Creating Organizational Units and a Mailbox Store \(Exchange 2000 Only\)”](#) section on page 2-44.

**Note**

Failover: If you are installing the secondary Cisco Unity server now, skip Task 33.

33. Familiarize yourself with the domain accounts you will create in Task 34. See the [“About the Accounts Required for the Cisco Unity Installation”](#) section on page 2-44.

**Note**

Failover: If you are installing the secondary Cisco Unity server now, skip Task 34.

34. Create the applicable accounts that are needed to install Cisco Unity. See the [“Creating the Accounts”](#) section on page 2-45.
35. If you created a Cisco Unity administration account in Task 34., add the account either to the local Administrators group—when the Cisco Unity server is a member server—or to the Domain Admins group—when the Cisco Unity server is a domain controller. See the [“Adding the Cisco Unity Administration Account to an Admins Group”](#) section on page 2-49.
36. Set rights and permissions for the accounts that you created in Task 34. See the [“Setting Rights and Permissions with the Cisco Unity Permissions Wizard”](#) section on page 2-50.

**Note**

Failover: If you are installing the secondary Cisco Unity server now, skip Task 37.

37. Set Exchange permissions. See the [“Setting Exchange Permissions”](#) section on page 2-54.
38. *If virus-scanning software or the Cisco IDS Host Sensor Agent is installed on the Cisco Unity server:* Disable virus-scanning services, and set the IDS Host Sensor Agent to run in On-Warning mode. See the [“Setting Security-Monitoring Software Before Running the Installation Programs”](#) section on page 2-60.
39. Install Cisco Unity. See the [“Installing Cisco Unity Software”](#) section on page 2-61.
40. *If virus-scanning software or the Cisco IDS Host Sensor Agent is installed on the Cisco Unity server:* Re-enable virus-scanning services, and reset the IDS Host Sensor Agent to run in On-Protecting mode. See the [“Resetting Security-Monitoring Software After the Installation Programs Have Been Run”](#) section on page 2-66.
41. Move SQL Server or MSDE database files and transaction logs. See the [“Moving the Data Store Databases and Transaction Log Files”](#) section on page 2-67.

42. Create an emergency repair disk. Refer to Windows 2000 Server Help.
43. Integrate Cisco Unity and the phone system. Refer to the Cisco Unity integration guide for your phone system. Cisco Unity integration guides are available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_configuration_guides_books_list.html and at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_configuration_guides_list.html.

**Note**

Failover: If you are installing the secondary Cisco Unity server now, skip Task 44.

44. If the Cisco Unity system will use the failover feature, install the secondary server by doing Task 4. through Task 43. Skip the tasks that do not apply to the secondary server as noted.

Part 2: Populating the Cisco Unity System with Subscriber and Call Management Data

You do most of the following tasks by using the Cisco Unity Administrator. (For information on logging on to the Cisco Unity Administrator and on using it, refer to the “Accessing the Cisco Unity Administrator” chapter of the *Cisco Unity System Administration Guide*.)

The tasks in Part 2 reference chapters in the *Cisco Unity System Administration Guide* that contain detailed information; the guide is available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_administration_guide_books_list.html.

If the system is using failover, subscriber and call management data will be replicated to the secondary server after you configure failover later in the installation.

45. Define system schedules:
 - a. Identify standard business hours.
 - b. Identify closed and weekend hours.
 - c. Create custom schedules, if necessary.
 - d. Identify holidays.See the “Schedule Settings Worksheet” and “Holiday Settings Worksheet” sections in the “System Settings Worksheets” chapter.
46. Set up phone, GUI, and TTS languages. See the “Multiple Languages” chapter.
47. Set up third-party fax, if applicable. See the “Integrating a Fax Server with Cisco Unity” chapter.
48. Create a call-management plan. See the “Call Management” chapter.
49. Prepare to create regular subscriber accounts:
 - a. Confirm that you have the applicable licenses for the features that you want subscribers to be able to use. You can view the number of licenses purchased on the System > Licensing page in the Cisco Unity Administrator. If you need additional licenses, contact your reseller.
 - b. Determine password and account lockout policy for Cisco Unity phone access. See the “Account Policy Settings” chapter.
 - c. Set up enhanced phone security, if applicable. See the “Enhanced Phone Security” chapter.
 - d. Review, change, and create classes of service. See the “Class of Service Settings” chapter.

- e. Create restriction tables, and assign them to the appropriate class(es) of service. See the “Restriction Tables” chapter.
 - f. Create public distribution lists. See the “Public Distribution List Settings” chapter.
 - g. Review, create, and modify subscriber templates. See the “Subscriber Template Settings” chapter.
50. Test the system configuration:
- a. Add a single subscriber (see the “Creating Subscriber Accounts” chapter).
 - b. Use the phone to log on to Cisco Unity as the test subscriber, record a voice name, and set a phone password. Hang up.
 - c. Call Cisco Unity and log on to Cisco Unity as the test subscriber again to confirm that the password, greeting, conversation, call transfer, and message options for the subscriber are working properly. Confirm that the subscriber inherited the correct class of service by testing any applicable features by phone.
 - d. If you gave the test subscriber the required class of service rights, log on as the test subscriber and test to see if you can browse to the ActiveAssistant. If you gave the test subscriber the required class of service rights, test to see if you can browse to the Cisco Unity Visual Messaging Interface (VMI).
 - e. Make corrections to the system configuration as necessary.
51. Create subscriber accounts. See the “Creating Subscriber Accounts” chapter.
52. *If you created more than 100 subscribers and are using Cisco Unity with Exchange 5.5:* Run the Exchange 5.5 Optimizer. See the “Adding Large Numbers of Subscribers to Cisco Unity with Exchange 5.5” section in the “Creating Subscriber Accounts” chapter.
53. Hide users in the Exchange address book, if applicable. See the “Hiding Recipients from the Address Book” section in the “Creating Subscriber Accounts” chapter.
54. Modify individual subscriber accounts as needed. See the “Subscriber Settings” chapter.
55. Add individual subscribers to public distribution lists, as needed. (For example, assign subscribers to screen those messages left in Cisco Unity that are not associated with a specific recipient, such as those left to the Unaddressed Messages distribution list or for the Opening Greeting call handler.) See the “Message Handling” section in the “Subscriber and Operator Orientation” chapter.
56. Implement, then test the call-management plan you created in Task 48.:
- a. Create call handlers. See the “Call Handler Settings” chapter.
 - b. Specify directory handler settings. See the “Directory Handler Settings” chapter.
 - c. Create interview handlers. See the “Interview Handler Settings” chapter.
 - d. Set up call routing. See the “Call Routing” chapter.
57. Back up Cisco Unity. Refer to *White Paper: Backing Up and Restoring a Cisco Unity System*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_technical_reference_list.html.

Part 3: Configuring Failover and Setting Up Networking Options (If Applicable)

58. *If the system is using failover:* Configure Cisco Unity failover. Refer to the “Configuring Cisco Unity Failover” chapter of the *Cisco Unity Failover Configuration and Administration Guide*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html.
59. *If the system is using Digital Networking:* Set up Digital Networking. Refer to the “Digital Networking” chapter of the *Networking in Cisco Unity Guide*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html. (Note that if the system is using failover, the settings for Digital Networking are replicated to the secondary server.)
60. *If the system is using Internet Subscribers:* Set up Internet subscribers. Refer to the “SMTP Networking” chapter of the *Networking in Cisco Unity Guide*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html.
61. *If the system is using SMTP Networking:* Set up SMTP Networking. Refer to the “SMTP Networking” chapter of the *Networking in Cisco Unity Guide*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html. (Note that if the system is using failover, the settings for SMTP Networking are replicated to the secondary server.)
62. *If the system is using AMIS Networking:* Set up AMIS Networking. Refer to the “AMIS Networking” chapter of the *Networking in Cisco Unity Guide*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html. (Note that if the system is using failover, the settings for AMIS Networking are replicated to the secondary server.)
63. *If the system is using Bridge Networking:* Install the Cisco Unity Bridge server. Refer to the “Overview of Mandatory Tasks for Installing the Cisco Unity Bridge” chapter of the *Cisco Unity Bridge Installation Guide*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_guides_books_list.html.
64. *If the system is using Bridge Networking:* Set up Cisco Unity and the Bridge for networking. Refer to the “Task List: Setting Up Cisco Unity and the Bridge for Networking” section in the “Bridge Networking” chapter of the *Cisco Unity Bridge Networking Guide*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html. (Note that if the system is using failover, the settings for the Bridge are replicated to the secondary server.)

Part 4: Subscriber Setup and Training

For tasks in Part 4, refer to the “Subscriber and Operator Orientation” chapter of the *Cisco Unity System Administration Guide*. The guide is available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_administration_guide_books_list.html.

65. As appropriate, set up subscriber computers to use the ActiveAssistant, Cisco Unity Visual Messaging Interface (VMI), and Cisco Unity ViewMail for Microsoft Outlook. In addition, provide computer speakers and microphones so subscribers can play and record messages, if applicable.
66. Train subscribers and operators to use Cisco Unity, if applicable.