



# Mandatory Tasks for Installing Cisco Unity

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Your installation tasks depend on whether you are installing Cisco Unity on a qualified server or on a system processing engine (SPE) in the Cisco Integrated Communications System (ICS) 7750. Use the applicable task list for your platform type to install Cisco Unity correctly:

- [Task List for Installing Cisco Unity on a Qualified Server, page 1-2](#)
- [Task List for Installing Cisco Unity in the Cisco ICS 7750, page 1-7](#)

The task list leads you through the complete installation of the Cisco Unity system—from installing and configuring the Cisco Unity server; to populating the Cisco Unity system with subscriber and call management data; to setting up networking options.



**Note**

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The tasks in the list reference detailed instructions in the *Cisco Unity Installation Guide* and in other Cisco Unity documentation. Follow the documentation for a successful installation.

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

# Task List for Installing Cisco Unity on a Qualified Server

**Note**

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Cisco assumes that the message store environment is already set up and working before the Cisco Unity system is installed.

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Use the following task list to install the Cisco Unity system correctly on a qualified server. The list is divided into four parts. The tasks in each part reference detailed instructions in the *Cisco Unity Installation Guide* and in other Cisco Unity documentation. 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

1. Verify the following requirements:
  - a. System requirements for the Cisco Unity 4.0 system. Refer to *Cisco Unity 4.0 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](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_pre_installation_guides_list.html).
  - b. Requirements for integrating the phone system(s). Refer to the “Requirements” section of the applicable Cisco Unity integration guide(s) on Cisco.com at [http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod\\_configuration\\_guides\\_list.html](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_configuration_guides_list.html) and [http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products\\_configuration\\_guides\\_books\\_list.html](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_configuration_guides_books_list.html).
2. Obtain Cisco Unity license files, gather the documentation and tools for the installation, and determine the drive locations for application, log, and database files that you will need later in the installation. See [Chapter 2, “Preparing for the Installation.”](#)

3. Prepare the Domino server for Cisco Unity:
  - a. Create a group for Cisco Unity servers, and name it **UnityServers**. Refer to the applicable IBM Lotus documentation.
  - b. Register a Cisco Unity mail account, and save the account as a .id file on a floppy diskette or in a directory other than the Domino directory (the default option). Make note of where you saved it. You will use it later in the installation process. Add the account to the Cisco Unity servers group. Refer to the applicable IBM Lotus documentation.
  - c. For the Cisco Unity servers group, grant Editor permissions for Admin4.nsf, and Editor with delete-documents permissions for Names.nsf. Refer to the applicable IBM Lotus documentation.
  - d. On each Domino server that will home Cisco Unity subscribers, install IBM Lotus Domino Unified Communications Services (DUCS) for Cisco Unity and the DUCS for Cisco Unity Administration client. Refer to the applicable IBM Lotus documentation.
  - e. Confirm that the network is configured so that Cisco Unity can resolve the unqualified Domino server name to an IP address. (For example, if the Domino server name is MailServer and you enter **ping mailserver** on the command line of the Cisco Unity server, the response is the IP address of the Domino server.)
4. Set up or program the phone system(s) and extensions to enable the integration with Cisco Unity. Refer to the “Programming the <Name> Phone System” section of the applicable Cisco Unity integration guide(s) on Cisco.com at [http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod\\_configuration\\_guides\\_list.html](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_configuration_guides_list.html) and [http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products\\_configuration\\_guides\\_books\\_list.html](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_configuration_guides_books_list.html).
5. Install voice cards, if applicable, and connect the phone system to the Cisco Unity computer. See [Chapter 3, “Setting Up the Hardware.”](#)
6. Configure the RAID arrays, if applicable, install Windows 2000 Server, and create the logical drives. See [Chapter 4, “Installing the Operating System.”](#)
7. Customize the Cisco Unity platform by configuring the operating system, installing required software components, and setting up the server in the Windows networking environment. See [Chapter 5, “Customizing the Cisco Unity Platform.”](#)

8. Install and configure Lotus Notes on the Cisco Unity server. See [Chapter 6, “Setting Up the Message Store Client.”](#)
9. Create the accounts required for the Cisco Unity installation, add the administration account to an Admins group, and set rights and permissions. See [Chapter 7, “Creating Accounts for the Installation and Setting Rights and Permissions.”](#)
10. Install and configure Cisco Unity software, and move SQL Server or MSDE database files and transaction logs, if applicable. See [Chapter 8, “Installing and Configuring Cisco Unity Software.”](#)
11. Install any optional software. See [Chapter 9, “Installing Optional Software.”](#)
12. Create an emergency repair disk that can be used to repair and restart Windows, if it is damaged. Refer to Windows 2000 Help.
13. Set up authentication for the Cisco Unity Administrator web application. See [Chapter 10, “Setting Up Authentication for the Cisco Unity Administrator.”](#)
14. Set up Cisco Unity to use SSL, if applicable. See [Chapter 11, “Setting Up Cisco Unity to Use SSL.”](#)

## 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 “The Cisco Unity Administrator” chapter of the *Cisco Unity System Administration Guide*.)

The tasks 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](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_administration_guide_books_list.html).

15. 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” and “Holiday Settings” sections in the “System Settings” chapter.

16. Set up phone, GUI, and TTS languages. See the “Multiple Languages” chapter.
17. Create a call management plan. See the “Call Management” chapter.
18. Prepare to create regular subscribers. See the “Before Creating Regular Subscriber Accounts” section in the “Creating Subscriber Accounts” chapter.
  - a. Confirm that you have the necessary permissions for creating subscriber accounts and that Cisco Unity is configured properly to work with the message store.
  - b. Confirm that you have the appropriate licenses.
  - c. Determine password and account lockout policy for Cisco Unity phone access.
  - d. Determine logon, password, and account lockout policy for Cisco Unity web access.
  - e. Review, change, and create classes of service.
  - f. Set up enhanced phone security, if applicable.
  - g. Create restriction tables, and assign them to the appropriate class(es) of service.
  - h. Create public distribution lists.
  - i. Review, create, and modify subscriber templates.
  - j. Confirm that the address book(s) listed on the System > Configuration > Subscriber Address Books page in the Cisco Unity Administrator contains the user data that you want to import when you create subscriber accounts.
  - k. If you are planning to create subscriber accounts for the purpose of accessing the Cisco Unity Administrator, review the “About the Accounts that Can Be Used To Administer Cisco Unity” section in “The Cisco Unity Administrator” chapter.
19. Test the system configuration:
  - a. Add a single subscriber (see the “Creating Subscriber Accounts” chapter). Log on to Cisco Unity as the test subscriber, record a voice name, and set a password.

- b. Confirm that the greeting, conversation, call transfer, and message options for the subscriber are working properly. Test the password.
  - c. Confirm that the subscriber inherited the correct class of service. Confirm access to the appropriate features.
  - d. Make corrections to the system configuration as necessary.
20. Create subscribers. See the “Creating Subscriber Accounts” chapter.
21. 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 “Default Accounts and Message Handling” chapter.
22. Modify individual subscriber accounts as needed. See the “Subscriber Settings” chapter.
23. Implement, then test the call management plan you created in Task 17.:
  - 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.
24. 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\\_reference09186a00800f8da6.html](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_technical_reference09186a00800f8da6.html).
25. As appropriate, set up subscribers to use the Cisco Personal Communications Assistant (PCA) and Lotus Notes with DUCS for Cisco Unity with IBM Lotus Notes. (Subscribers use the Cisco PCA to access the Cisco Unity Assistant.) See the “Setting Up Client Applications” chapter.

## Part 3: Setting Up Networking Options

26. *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](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html).
27. *If the system is using Internet Subscribers:* Set up Internet subscribers. Refer to the “Internet Subscribers” 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](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html).

## Part 4: Training

28. Train subscribers and operators to use Cisco Unity, if applicable. Refer to the “Subscriber and Operator Orientation” chapter of the *Cisco Unity System Administration Guide*.

# Task List for Installing Cisco Unity in the Cisco ICS 7750

The Cisco ICS 7750 is an integrated communications platform that provides call processing, voice applications, and multiservice IP routing to deliver a fully converged IP network solution. The Cisco ICS 7750 is a chassis system with six universal slots that accept the following cards:

- System processing engine (SPE)—The applications server card that is running the Windows 2000 server operating system. This card can run Cisco CallManager, which provides the call processing capability, and other voice applications, such as Cisco Unity.
- Multiservice route processor (MRP)—The multiservice router/voice gateway card that is running Cisco IOS Software. This card supports both digital and analog voice trunk gateways and WAN interfaces.

You install the Cisco Unity system on a dedicated SPE (also referred to as the “Cisco Unity server”) in the Cisco ICS 7750.

Use the following task list to install Cisco Unity correctly in the Cisco ICS 7750. The list is divided into four parts. The tasks in each part reference detailed instructions in the *Cisco Unity Installation Guide* and in other Cisco Unity documentation. Follow the documentation for a successful installation. The tasks apply only to installing Cisco Unity in the Cisco ICS 7750.

Related documentation for Cisco Unity in the Cisco ICS 7750 can be found on Cisco.com at <http://www.cisco.com/univercd/cc/td/doc/product/voice/ics/icsapps/icsunity/um40/index.htm>.

Some of the tasks apply only to specific configurations, and are noted as such. If a task does not apply to your configuration, you can skip it.

## Part 1: Installing and Configuring the Cisco Unity Server

1. Verify the following requirements:
  - a. System requirements for the Cisco Unity 4.0 system. Refer to *Cisco Unity 4.0 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](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_pre_installation_guides_list.html).
  - b. Requirements for integrating the IP phone system. Refer to the “Requirements” section of the applicable version of the *Cisco CallManager Integration Guide for Cisco Unity* on Cisco.com at [http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod\\_configuration\\_guides\\_list.html](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_configuration_guides_list.html).
2. Obtain Cisco Unity license files, and gather the documentation and tools for the installation. See [Chapter 2, “Preparing for the Installation.”](#)
3. Prepare the Domino server for Cisco Unity:
  - a. Create a group for Cisco Unity servers, and name it **UnityServers**. Refer to the applicable IBM Lotus documentation.



6. Configure the IP address and primary DNS information by using ICSconfig. Refer to the “Installing a New SPE for Applications” section in the *Cisco ICS 7750 FRU Installation* guide at [http://www.cisco.com/en/US/products/hw/voiceapp/ps967/prod\\_maintenance\\_guide09186a00800cd941.html](http://www.cisco.com/en/US/products/hw/voiceapp/ps967/prod_maintenance_guide09186a00800cd941.html).
7. Configure the following items for the SPE by using Windows Control Panel:
  - a. Set the correct time by clicking **Start > Settings > Control Panel > Date/Time**.
  - b. Change the computer name before installing software by clicking **Start > Settings > Control Panel > System > Network Identification**.
8. The following tasks are required to correct problems with the Cisco Unity installation on the ICS 7750. Refer to the *Release Notes for Cisco Unity 4.0 on the Cisco ICS 7750* that is included with this product.
  - a. Change the NetBIOS settings for the SPE for Cisco Unity.
  - b. Uninstall DHCP.
  - c. Replace the perfwci.ini file.

You can find the latest version of the *Release Notes for Cisco Unity 4.0 on the Cisco ICS 7750* at this URL:

<http://www.cisco.com/univercd/cc/td/doc/product/voice/ics/icsapps/icsunity/um40/index.htm>.

9. Use the Cisco Unity System Preparation Assistant to customize the Cisco Unity platform. See [Chapter 5, “Customizing the Cisco Unity Platform.”](#)
10. Install and configure Lotus Notes on the Cisco Unity server. See [Chapter 6, “Setting Up the Message Store Client.”](#)
11. Create the accounts required for the Cisco Unity installation, add the administration account to an Admins group, and set rights and permissions. See [Chapter 7, “Creating Accounts for the Installation and Setting Rights and Permissions.”](#)
12. Use the Cisco Unity Installation and Configuration Assistant to install and configure Cisco Unity. See [Chapter 8, “Installing and Configuring Cisco Unity Software.”](#)
13. Install any optional software. See [Chapter 9, “Installing Optional Software.”](#)

14. Set up authentication for the Cisco Unity Administrator web application. See [Chapter 10, “Setting Up Authentication for the Cisco Unity Administrator.”](#)
15. Set up Cisco Unity to use SSL, if applicable. See [Chapter 11, “Setting Up Cisco Unity to Use SSL.”](#) You must download the Certificate Service files before you can install the Certificate Services components. Refer to the *Release Notes for Cisco Unity 4.0 on the Cisco ICS 7750* at this URL: <http://www.cisco.com/univercd/cc/td/doc/product/voice/ics/icsapps/icsunity/um40/index.htm>.

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

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  - b. Specify directory handler settings. See the “Directory Handler Settings” chapter.
  - c. Create interview handlers. See the “Interview Handler Settings” chapter.
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26. As appropriate, set up subscribers to use the Cisco Personal Communications Assistant (PCA) and Lotus Notes with DUCS for Cisco Unity with IBM Lotus Notes. (Subscribers use the Cisco PCA to access the Cisco Unity Assistant.) See the “Setting Up Client Applications” chapter.

## Part 3: Setting Up Networking Options

27. *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](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html).
28. *If the system is using Internet Subscribers:* Set up Internet subscribers. Refer to the “Internet Subscribers” 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](http://www.cisco.com/en/US/products/sw/voicesw/ps2237/products_installation_and_configuration_guide_books_list.html).

## Part 4: Training

29. Train subscribers and operators to use Cisco Unity, if applicable. Refer to the “Subscriber and Operator Orientation” chapter of the *Cisco Unity System Administration Guide*.