



Mandatory Tasks for Installing Cisco Unity

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 1-9](#)

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 optional features, such as failover and networking.



Note

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.

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

Task List for Installing Cisco Unity on a Qualified Server

**Note**

Cisco assumes that the message store environment is already set up and working before the Cisco Unity system is installed in all configurations except Voice Messaging with Exchange on the Cisco Unity server. For information on Cisco Unity configurations, refer to the “Cisco Unity Configurations” section of *Cisco Unity 4.0 System Requirements, and Supported Hardware and Software*, available on Cisco.com at http://www.cisco.com/en/US/products/sw/voicesw/ps2237/prod_pre_installation_guides_list.html.

Use the following task list to install the Cisco Unity system correctly on a qualified server. The list is divided into five 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

**Note**

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.

1. Verify the following requirements:
 - a. System requirements for the Cisco Unity 4.0 system—including for the failover feature, if applicable. 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.

8. 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.”](#)
9. 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.”](#)
10. Install any optional software. See [Chapter 9, “Installing Optional Software.”](#)
11. Create an emergency repair disk that can be used to repair and restart Windows, if it is damaged. Refer to Windows 2000 Help.
12. Set up authentication for the Cisco Unity Administrator web application. See [Chapter 10, “Setting Up Authentication for the Cisco Unity Administrator.”](#)
13. Set up Cisco Unity to use SSL, if applicable. See [Chapter 11, “Setting Up Cisco Unity to Use SSL.”](#)

Part 2: Installing the Secondary Server for Cisco Unity Failover (If Applicable)



Note

If the system is not using failover, skip to Part 3 of the task list, “Populating the Cisco Unity System with Subscriber and Call Management Data.”

14. On the secondary server, repeat the following tasks, depending on the phone system integration being used:
 - For Cisco CallManager, repeat [Tasks 3. through 7.](#)
 - For a circuit-switched phone system, repeat [Tasks 4. through 7.](#)
15. For the same accounts that you created in [Task 8.](#), add the administration account to an Admins group, and run the Cisco Unity Permissions wizard to set rights and permissions. See [Chapter 7, “Creating Accounts for the Installation and Setting Rights and Permissions.”](#)
16. 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.”](#)
17. Install any optional software. See [Chapter 9, “Installing Optional Software.”](#)

18. Create an emergency repair disk that can be used to repair and restart Windows, if it is damaged. Refer to Windows 2000 Help.
19. Configure IIS so that the Cisco Unity Administrator uses the Anonymous authentication method, if applicable. See [Chapter 10, “Setting Up Authentication for the Cisco Unity Administrator.”](#)
20. Set up Cisco Unity to use SSL, if applicable. See [Chapter 11, “Setting Up Cisco Unity to Use SSL.”](#)

Part 3: 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.



Note

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.

21. 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.

22. Set up phone, GUI, and TTS languages. See the “Multiple Languages” chapter.

23. Set up third-party fax, if applicable. See the “Integrating a Fax Server with Cisco Unity” chapter.
24. Create a call management plan. See the “Call Management” chapter.
25. 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. 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.
26. 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.
27. Create subscribers. See the “Creating Subscriber Accounts” chapter.

28. 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.
29. Modify individual subscriber accounts as needed. See the “Subscriber Settings” chapter.
30. Implement, then test the call management plan you created in Task 24.:
 - a. Create call handlers. See the “Call Handler Settings Worksheets” chapter.
 - b. Specify directory handler settings. See the “Directory Handler Settings Worksheets” chapter.
 - c. Create interview handlers. See the “Interview Handler Settings Worksheets” chapter.
 - d. Set up call routing. See the “Call Routing Worksheets” chapter.
31. 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.
32. As appropriate, set up subscribers to use the Cisco Personal Communications Assistant (PCA) and ViewMail. (Subscribers use the Cisco PCA to access the Cisco Unity Assistant and the Cisco Unity Inbox.) See the “Setting Up Client Applications” chapter.

Part 4: Configuring Failover and Setting Up Networking Options

33. *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.
34. *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.

[tion_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.)

35. *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. (Note that if the system is using failover, the settings for Internet subscribers are replicated to the secondary server.)
36. *If the system is using SMTP Networking:* Set up SMTP Networking. Refer to the “SMTP Networking” chapter of *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.)
37. *If the system is using AMIS Networking:* Set up AMIS Networking. Refer to the “AMIS Networking” chapter of *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.)
38. *If the system is using VPIM Networking:* Set up VPIM Networking. Refer to the “VPIM Networking” chapter of *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 VPIM Networking are replicated to the secondary server.)
39. *If the system is using the Cisco Unity Bridge:* Install the Bridge server. Refer to the “Task List 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.

40. *If the system is using the Cisco Unity Bridge:* 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 5: Training

41. 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.
 - 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.
 - c. *If the system is using the Cisco Unity Bridge:* Requirements for the applicable version of the Bridge. Refer to *Cisco Unity Bridge 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.
2. Obtain Cisco Unity license files, and gather the documentation and tools for the installation. See [Chapter 2, “Preparing for the Installation.”](#)
3. Program the IP phone system and extensions to enable the integration with Cisco Unity. Refer to the “Programming the Cisco CallManager Phone System” 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.

4. Install the SPE for Cisco Unity in the Cisco ICS 7750. Refer to the “Installing an SPE” section in the *Cisco ICS 7750 FRU Installation* guide at http://www.cisco.com/en/US/products/hw/voiceapp/ps967/prod_maintenance_guide09186a00800cd941.html.
5. 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.
6. 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**.
7. 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>.

8. Use the Cisco Unity System Preparation Assistant to customize the Cisco Unity platform. See [Chapter 5, “Customizing the Cisco Unity Platform.”](#)
9. Install and configure Exchange. See [Chapter 6, “Setting Up the Message Store.”](#)
10. If you installed Exchange on the SPE for Cisco Unity in the Voice Messaging configuration, correct the DNS perflib errors problem. Refer to the *Release Notes for Cisco Unity 4.0 on the Cisco ICS 7750* for instructions.

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

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/voicew/sw/ps2237/products_administration_guide_books_list.html.

16. 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.

17. Set up phone, GUI, and TTS languages. See the “Multiple Languages” chapter.
18. Set up third-party fax, if applicable. See the “Integrating a Fax Server with Cisco Unity” chapter.
19. Create a call management plan. See the “Call Management” chapter.
20. 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. 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.
21. 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.
22. Create subscribers. See the “Creating Subscriber Accounts” chapter.
23. 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.
24. Modify individual subscriber accounts as needed. See the “Subscriber Settings” chapter.
25. Implement, then test the call management plan you created in Task 24.:
 - a. Create call handlers. See the “Call Handler Settings Worksheets” chapter.
 - b. Specify directory handler settings. See the “Directory Handler Settings Worksheets” chapter.
 - c. Create interview handlers. See the “Interview Handler Settings Worksheets” chapter.
 - d. Set up call routing. See the “Call Routing Worksheets” chapter.
26. 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.
27. As appropriate, set up subscribers to use the Cisco Personal Communications Assistant (PCA) and ViewMail. (Subscribers use the Cisco PCA to access the Cisco Unity Assistant and the Cisco Unity Inbox.) See the “Setting Up Client Applications” chapter.

Part 3: Setting Up Networking Options

28. *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.
29. *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.
30. *If the system is using SMTP Networking:* Set up SMTP Networking. Refer to the “SMTP Networking” chapter of *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.
31. *If the system is using AMIS Networking:* Set up AMIS Networking. Refer to the “AMIS Networking” chapter of *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.
32. *If the system is using VPIM Networking:* Set up VPIM Networking. Refer to the “VPIM Networking” chapter of *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.
33. *If the system is using the Cisco Unity Bridge:* Install the Bridge server. Refer to the “Task List 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.
34. *If the system is using the Cisco Unity Bridge:* 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.

Part 4: Training

35. 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*.