



# Overview of Mandatory Tasks for Installing Cisco Unity



**Note**

If you are upgrading Cisco Unity, refer to the *Cisco Unity Reconfiguration and Upgrade Guide* for upgrade instructions.

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.

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; to backing up Cisco Unity.



**Note**

Cisco assumes that the Exchange environment is already set up and working before the Cisco Unity system is installed in all configurations except Voice Messaging with Exchange 2000 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* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/sysreq/40\\_sysrq.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/sysreq/40_sysrq.htm).

The list is divided into six parts. 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 Server

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



**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 requirements for the failover feature, if applicable. Refer to *Cisco Unity 4.0 System Requirements, and Supported Hardware and Software* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/sysreq/40\\_sysrq.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/sysreq/40_sysrq.htm).
  - b. Requirements for integrating the phone system(s)—including requirements for the failover feature, if applicable. Refer to the “Requirements” section of the applicable Cisco Unity integration guide(s) 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).
  - c. *If the system is using Bridge Networking*: Requirements for the Cisco Unity Bridge. Refer to *Cisco Unity Bridge 3.0 System Requirements, and Supported Hardware and Software* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/bridge30/sysreq/30bsysrq.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/bridge30/sysreq/30bsysrq.htm).
  - d. *If the system is using any networking option (including Bridge)*: Requirements for the networking option. Refer to *Cisco Unity Networking Options Requirements (With Microsoft Exchange)* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/sysreq/netrq.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/sysreq/netrq.htm).
2. Obtain Cisco Unity license files, gather the documentation and tools for the installation, download the latest Microsoft updates and other software, 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. Set up or program the phone system(s) and extensions to enable the integration(s) with Cisco Unity. Refer to the “Programming the <Name> Phone System” section of the applicable Cisco Unity integration guide(s) 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).
4. Install voice cards, if applicable, and connect the phone system to the Cisco Unity computer. See [Chapter 3, “Setting Up the Hardware.”](#)
5. Configure the RAID arrays, if applicable, install Windows 2000 Server, and create the logical drives, if applicable. See [Chapter 4, “Installing the Operating System.”](#)
6. Use the Cisco Unity System Preparation Assistant to configure the operating system and install required software components. Then set up the server in the Windows networking environment. See [Chapter 5, “Customizing the Cisco Unity Platform.”](#)
7. Install and configure the applicable Exchange software. See [Chapter 6, “Setting Up Exchange.”](#)
8. Create the accounts required for the Cisco Unity installation, and set rights and permissions. See [Chapter 7, “Creating Accounts for the Installation and Setting Rights and Permissions.”](#)
9. Decide whether to set up Cisco Unity to use SSL and install the Microsoft Certificate Services component, if applicable, then use the Cisco Unity Installation and Configuration Assistant to install and configure Cisco Unity software, and to set up the Cisco Personal Communications Assistant to use SSL, if applicable. You also set up the Cisco Unity Administrator and the Status Monitor to use

SSL, if applicable, then secure the Example Administrator account against toll fraud, 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.”](#)



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**Caution** Do not install Microsoft Outlook on the Cisco Unity server, or Cisco Unity may not notify subscribers of new messages.

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11. Create an emergency repair disk that can be used to repair and restart Windows, if it is damaged. Refer to Windows 2000 Server Help.
12. Determine the authentication method that you want to use for the Cisco Unity Administrator web application, and configure IIS, as applicable. See [Chapter 10, “Setting Up Authentication for the Cisco Unity Administrator.”](#)
13. *If the system is not using Cisco Unity failover:* Store all of the software that was shipped with Cisco Unity 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 system, or Cisco TAC may require you to access them during a service call.

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

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



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**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.”

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14. *With a Cisco CallManager integration only:* On the phone system, add the voice messaging ports that will be used by the secondary server. Refer to the “Programming the Cisco CallManager Phone System” section of the applicable Cisco CallManager integration guide 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).
15. On the secondary server, repeat the following Part 1 tasks, depending on the phone system integration being used:
  - For Cisco CallManager, repeat Task 5. through Task 7.
  - For a circuit-switched phone system, repeat Task 4. through Task 7.
16. For the same accounts that you created in Task 8., add the Cisco Unity administration account to the Local Administrators 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.”](#)
17. Use the Cisco Unity Installation and Configuration Assistant to install and configure Cisco Unity software, and to set up the Cisco Personal Communications Assistant to use SSL, if applicable. You also set up the Cisco Unity Administrator and the Status Monitor to use SSL, if applicable, and move SQL Server or MSDE database files and transaction logs, if applicable. See [Chapter 8, “Installing and Configuring Cisco Unity Software.”](#)
18. Install any optional software. See [Chapter 9, “Installing Optional Software.”](#)

19. Create an emergency repair disk that can be used to repair and restart Windows, if it is damaged. Refer to Windows 2000 Server Help.
20. Configure IIS so that the Cisco Unity Administrator and Status Monitor use the Anonymous authentication method, if you decided to use that method. See [Chapter 10, “Setting Up Authentication for the Cisco Unity Administrator.”](#)
21. Store all of the software that was shipped with Cisco Unity 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 system, or Cisco TAC may require you to access them during a service call.

## Part 3: Populating the Cisco Unity System with Subscriber and Call Management Data

You do most of the tasks in Part 3 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 reference chapters in the *Cisco Unity System Administration Guide, Release 4.0(4)* that contain detailed information; the guide is available at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/unity40/sag/sag404/ex/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/unity40/sag/sag404/ex/index.htm).



### Note

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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.

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22. Define system schedules:
  - a. Identify standard business hours.
  - b. Identify closed and weekend hours.
  - c. Create custom schedules, if necessary.
  - d. Identify holidays.

Refer to the “Schedule Settings” and “Holiday Settings” sections in the “System Settings” chapter.
23. Set up phone, GUI, and TTS languages (including TTY, if applicable). Refer to the “Languages” chapter.
24. Set up third-party fax, if applicable. Refer to the “Integrating a Fax Server with Cisco Unity” chapter.
25. Create a call management plan. Refer to the “Call Management” chapter.
26. Set up the Cisco Unity Greetings Administrator, if applicable. Refer to the “Call Management” chapter.
27. Prepare to create regular subscriber accounts. Refer to 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 applicable 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. Set up enhanced phone security, if applicable.
  - f. Review, change, and create classes of service.
  - 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. Secure phone passwords, and, as applicable, secure Windows domain account passwords.
  - j. As needed, change the locale ID of the MAPI profile for the Cisco Unity server.
28. Set up the Cisco Unity Hospitality and property management system integration, if applicable. Refer to the “Hospitality and Property Management System Integration” chapter.
29. Test the system configuration:
- a. Add a single subscriber (refer to 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, and conversation style specified for the subscriber are working properly. Confirm that the subscriber 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 subscriber. If you gave the test subscriber the required class of service rights, test to see if you can browse from the Cisco PCA Welcome page to the Cisco Unity Assistant. If you gave the test subscriber the required class of service rights, test to see if you can browse to the Cisco Unity Inbox.
  - e. Make corrections to the system configuration as necessary.
30. Create subscriber accounts. Refer to the “Creating Subscriber Accounts” chapter.
31. *If you created more than 100 subscribers, and are using Cisco Unity with Exchange 5.5:* Run the Exchange 5.5 Optimizer. Refer to the “Adding Large Numbers of Subscribers to Cisco Unity with Exchange 5.5” section in the “Creating Subscriber Accounts” chapter.
32. Hide users in the Exchange address book, if applicable. Refer to the “Preventing Subscribers from Appearing in Outlook Address Books” section in the “Creating Subscriber Accounts” chapter.
33. Modify individual subscriber accounts as needed. Refer to the “After Creating Subscriber Accounts” section in the “Creating Subscriber Accounts” chapter.
34. 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.) Refer to the “Message Handling” section in the “Default Accounts and Message Handling” chapter.
35. Implement, then test the call management plan you created in Task 25.:
- a. Create call handlers. Refer to the “Call Handler Settings” chapter.
  - b. Specify directory handler settings. Refer to the “Directory Handler Settings” chapter.
  - c. Create interview handlers. Refer to the “Interview Handler Settings” chapter.
  - d. Set up call routing. Refer to the “Call Routing” chapter.
36. Set up substitute objects on the System > Configuration > Settings page of the Cisco Unity Administrator. The objects are Substitute Recipient, Substitute Owner, Substitute After Message Call Handler, and Substitute Exit Call Handler. Cisco Unity uses the objects to replace references to

any subscriber that is deleted by using the Cisco Unity Administrator without first reassigning such references (for example, ownership of a call handler or distribution list). Refer to Cisco Unity Administrator Help for a description of each object and where it applies.

37. As appropriate, set up subscribers to use their phones to access Cisco Unity, specify their recording and playback device, and install Cisco Unity ViewMail for Microsoft Outlook. Refer to the “Setting Up Client Applications” chapter.

## Part 4: Configuring Failover and Setting Up Networking Options (If Applicable)

38. *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, Release 4.0* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/fail/fail401/ex/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/fail/fail401/ex/index.htm).
39. *If the system is using Digital Networking:* Set up Digital Networking. Refer to the “Digital Networking” chapter of the *Networking in Cisco Unity Guide, Release 4.0(4)* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/unity40/net/net404/ex/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/unity40/net/net404/ex/index.htm). (Note that if the system is using failover, the settings for Digital Networking are replicated to the secondary server.)
40. *If the system is using Internet Subscribers:* Set up Internet subscribers. Refer to the “SMTP Networking” chapter of the *Networking in Cisco Unity Guide, Release 4.0(4)* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/unity40/net/net404/ex/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/unity40/net/net404/ex/index.htm).
41. *If the system is using SMTP Networking:* Set up SMTP Networking. Refer to the “SMTP Networking” chapter of the *Networking in Cisco Unity Guide, Release 4.0(4)* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/unity40/net/net404/ex/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/unity40/net/net404/ex/index.htm). (Note that if the system is using failover, the settings for SMTP Networking are replicated to the secondary server.)
42. *If the system is using AMIS Networking:* Set up AMIS Networking. Refer to the “AMIS Networking” chapter of the *Networking in Cisco Unity Guide, Release 4.0(4)* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/unity40/net/net404/ex/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/unity40/net/net404/ex/index.htm). (Note that if the system is using failover, the settings for AMIS Networking are replicated to the secondary server.)
43. *If the system is using VPIM Networking:* Set up VPIM Networking. Refer to the “VPIM Networking” chapter of the *Networking in Cisco Unity Guide, Release 4.0(4)* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/unity40/net/net404/ex/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/unity40/net/net404/ex/index.htm). (Note that if the system is using failover, the settings for VPIM Networking are replicated to the secondary server.)
44. *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, Release 3.0* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/bridge30/big/big30/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/bridge30/big/big30/index.htm).
45. *If the system is using Bridge Networking:* Set up Cisco Unity and the Bridge for networking. Refer to the “Setting Up Cisco Unity and the Bridge for Networking” chapter of the *Cisco Unity Bridge Networking Guide, Release 3.0* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/bridge30/bnet/bnet30/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/bridge30/bnet/bnet30/index.htm). (Note that if the system is using failover, the settings for the Bridge are replicated to the secondary server.)

## Part 5: Backing Up Cisco Unity

46. Back up Cisco Unity. Refer to the “Backing Up and Restoring a Cisco Unity System” chapter of the *Cisco Unity Maintenance Guide, Release 4.0(4)* at [http://www.cisco.com/univercd/cc/td/doc/product/voice/c\\_unity/unity40/maint/maint404/ex/index.htm](http://www.cisco.com/univercd/cc/td/doc/product/voice/c_unity/unity40/maint/maint404/ex/index.htm).

## Part 6: Training

47. Train subscribers, operators, and support desk personnel to use Cisco Unity. Refer to the “Preparing Subscribers, Operators, and Support Desk Personnel to Work with Cisco Unity” chapter of the *Cisco Unity System Administration Guide*.

