Preparing to Add User Accounts in Cisco Unity Connection 8.x

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 that 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. It is also important to consider system partitions and search spaces, schedules, and mailbox stores before adding user accounts.

For administrator accounts, you need to select and define only a template. Administrator accounts are not assigned to a COS, schedule, partition, or search space. Instead, to determine which tasks administrators can do, you need to select the roles that are assigned to each account.

The following sections provide further information on templates, classes of service, partitions and search spaces, mailbox stores, schedules, and roles:

- Templates in Cisco Unity Connection 8.x, page 2-1
- Class of Service in Cisco Unity Connection 8.x, page 2-2
- Partitions and Search Spaces in Cisco Unity Connection 8.x, page 2-2
- Mailbox Stores in Cisco Unity Connection 8.x, page 2-3
- Schedules in Cisco Unity Connection 8.x, page 2-3
- Roles in Cisco Unity Connection 8.x, page 2-4

Templates in Cisco Unity Connection 8.x

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 templates that you plan to use and determine whether you need to make changes or create new templates. For each template, consider which features you want to enable, specify a class of service, and set a schedule and time zone for the accounts that you create. When creating accounts on a Cisco Unity Connection system, you also need to select the authentication rule that dictates the password or PIN 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 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 similar 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 in Cisco Unity Connection 8.x" chapter. Review the "Setting Up Features and Functionality That Are Controlled by User Account Settings in Cisco Unity Connection 8.x" chapter to learn about the settings that affect how users interact with Connection.

Class of Service in Cisco Unity Connection 8.x

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 email 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 the corporate directory, 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 in Cisco Unity Connection 8.x" 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 in Cisco Unity Connection 8.x" chapter.

Partitions and Search Spaces in Cisco Unity Connection 8.x

In Cisco Unity Connection, you create partitions as a way to group objects to which callers and users can address messages or place calls while interacting with Connection. Each user is a member of one or more partitions (for example, a user can have a primary extension in one partition and an alternate extension in a different partition). Extensions must be unique within a partition, but the names of objects do not have to be unique within a partition.

Search spaces are used to define the search scope of objects (users, distribution lists, and so on) that a user or outside caller can reach while interacting with Connection. For example, the search scope that is applied to a user identifies which users, distribution lists, or VPIM contacts the user can address messages to. It also identifies which users and contacts the user can dial by name when using the voice-recognition conversation.

A search space is comprised of one or more ordered partitions. When Connection searches for an object on behalf of a caller, it searches the partitions in the order in which they are arranged in the search space. While extensions must be unique within a partition, they do not need to be unique within a search space, so you can use search spaces to handle dial plans that have overlapping extensions.

Before you add user accounts, review the partition and search scope that are specified in the user template that you plan to use. You may need to modify the template or create a new one.

Keep in mind that if you change the partition or search space that is specified on a user template page, any already-created user accounts that were based on that template are not reassigned to the new partition or search space. In contrast, when you modify the partition membership of a search space, the changes affect both new and existing users of that search space. This means that you can update search space settings before and after you create user accounts. You can also reassign a user to a different partition or search space at any time.

For instructions on creating or modifying partitions and search spaces, see the "Managing Partitions and Search Spaces in Cisco Unity Connection 8.x" chapter of the *System Administration Guide for Cisco Unity Connection Release 8.x*, at http://www.cisco.com/en/US/docs/voice_ip_comm/connection/8x/administration/guide/8xcucsagx.html.

Mailbox Stores in Cisco Unity Connection 8.x

Cisco Unity Connection allows you to create multiple mailbox stores, which can be useful for customers with large installations, where the time required to complete a backup is an issue.

Before you add user accounts, review the mailbox store that is specified in the user template that you plan to use. You may need to modify the template to specify a different mail store, or create a new template.

Keep in mind that if you change the mailbox store that is specified on a user template page, any already-created user accounts that were based on that template are not reassigned to the new mailbox store. However, you can reassign a user to a different mailbox store at any time.

For instructions on creating or modifying mailbox stores, see the "Managing Mailbox Stores in Cisco Unity Connection 8.x" chapter of the *System Administration Guide for Cisco Unity Connection Release 8.x*, at http://www.cisco.com/en/US/docs/voice_ip_comm/connection/8x/administration/guide/8xcucsagx.html.

Schedules in Cisco Unity Connection 8.x

Cisco Unity Connection uses schedules to help determine which user transfer rule to apply and which user greeting to play.

Before you add user accounts, review the active schedule that is specified for the template that you plan to use. You may need to modify the template to specify a different schedule, or create a new template.

Keep in mind that if you change the active schedule that is specified on a user template page, any already-created user accounts that were based on that template are not reassigned to the new schedule. In contrast, when you modify a schedule, the changes affect both new and existing users of that schedule. This means that you can update schedule settings before and after you create user accounts. You can also reassign a user to a different schedule at any time.

For instructions on managing schedules, see the "Managing Schedules and Holidays in Cisco Unity Connection 8.x" chapter of the *System Administration Guide for Cisco Unity Connection Release 8.x*, at http://www.cisco.com/en/US/docs/voice_ip_comm/connection/8x/administration/guide/8xcucsagx.html.

Roles in Cisco Unity Connection 8.x

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Cisco Unity 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 are 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, in Cisco Unity Connection Administration, expand System Settings > Roles and select 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.
Audit Administrator (Cisco Unity Connection 8.5 and later only)	This role allows an administrator to enable or disable Cisco Unity Connection application and database auditing, to configure audit settings, and to view or delete audit logs.
Greeting Administrator	This role allows an administrator to access the Cisco Unity Greetings Administrator, a Connection phone conversation that allows users to manage the recorded greetings for call handlers by phone. **Note** You 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 PINs, unlock user accounts, and view user setting pages. **Note** The "Manage Call Handlers Belonging To Users Only - View Only" privilege refers to the primary call handler assigned to a user that include all greetings, transfer rules, and menu entries that you see on the User's page under the Roles section.
Mailbox Access Delegate Account	A user with this role has access to all messages. Remote applications such as Cisco Unified Mobility Advantage use the username and password of a user with this role for the purposes of retrieving messages on behalf of other users. Typically this role is assigned to only one user account, which does not represent a real user but exists to access mailboxes on behalf of other users.

Remote Administrator	This role allows an administrator to administer the database by using remote tools.
System Administrator	This is the top-level Connection administration role. This role allows access to all Connection administrative functions, including all user and system settings, all reports, and all administration and diagnostic tools. The default administrator account that the installer specified during initial setup of Connection is set to this role. A System Administrator is the only role that has permission to create administrative accounts.
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, and use user administration tools.

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.