



Cisco SBCS Customer Site Survey

Use this Customer Site Survey to assist in planning and configuring Cisco SBCS deployments.

The audience for this site survey includes Cisco SMB Select-certified VARs and channel partners who are familiar with configuration of voice and security features on the Cisco Smart Business Communications System (SBCS) using Cisco Configuration Assistant (CCA).

The information in this document applies to CCA release 2.2(1), Cisco SBCS release 2.0 and later, and version 8.0.0 or later of the UC 500 software package for supported platforms.

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Customer Account Information

Table 1. Site Survey — Customer Account Information

Customer Account Information	
Business Name	
Business Street Address	
Country/Postal Code	
Primary Business Phone Number	
Primary Contact(s)	
Business Email	
Business Description	
Deployment Type	<input type="checkbox"/> New Installation <input type="checkbox"/> Existing Installation (Greyfield)
Multisite Required?	<input type="checkbox"/> Yes <input type="checkbox"/> No Multisite deployments require special consideration. Refer to the chapter on the Multisite Manager in the <i>Cisco Configuration Assistant Smart Business Communications System Administrator Guide</i> for deployment requirements and guidelines.

Equipment

Table 2. Site Survey — Equipment

Equipment	Quantity/Model	Description
Base UC500 Platform	<input type="checkbox"/> UC 520 (max 64 user licenses) <input type="checkbox"/> UC 540 (max 32 user licenses) <input type="checkbox"/> UC 560 (max 104 user licenses)	UC500 model, based on number of user licenses.
Switches	Total number of switch ports required: PoE ports required? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, number of PoE ports: <input type="checkbox"/> 10/100 (FE) <input type="checkbox"/> 10/100/1000 (GigE) Supported Switch Models: <input type="checkbox"/> Small Business Pro ESW 500 Series See www.cisco.com/go/esw500help for more information about models and features. <input type="checkbox"/> Catalyst Express 520 Series See www.cisco.com/en/US/products/ps7238/index.html for more information about models and features.	PoE models are recommended if you will be connecting IP phones to these switchports.

Table 2. Site Survey — Equipment

Equipment	Quantity/Model	Description
Secure Router Present in Network or Required?	Cisco SR 500 Series Secure Routers <input type="checkbox"/> Cisco SR 520-ADSL <input type="checkbox"/> Cisco SR 520-Ethernet <input type="checkbox"/> Cisco Small Business Pro SR 520-T1 Cisco Small Business Pro SA 500 Series <input type="checkbox"/> SA 520 <input type="checkbox"/> SA 520W (integrated wireless) <input type="checkbox"/> SA 540	Cisco SR 500 Series secure routers and Cisco Small Business Pro SA 500 Security Appliances require additional security and firewall configuration. For more information, go to www.cisco.com/go/sa500 (SA 500 Series) or www.cisco.com/go/sr500 (for SR 500 Series).
Cisco IP Phones (non-wireless)	Model: Qty: Model: Qty Model: Qty	List non-wireless IP phone quantities by model See “Site Survey — Wireless Network and Device Information,” on page 5 to enter information about wireless phones.
Expansion Module(s) required?	Model(s): Qty:	Sidecar for receptionist/admin phones
Number of wireless access points	<input type="checkbox"/> UC 520W (integrated wireless) <input type="checkbox"/> UC 540W (integrated wireless) <input type="checkbox"/> SR 500W (integrated wireless) <input type="checkbox"/> SA 500W (integrated wireless) <input type="checkbox"/> AP541N external AP (max of 10) <input type="checkbox"/> AP 521 external AP (max of 12) Quantity	Number present in network or number required NOTE Cisco Small Business Pro AP541N wireless APs support clustering; this eliminates the need for a wireless LAN controller). For more information, see www.cisco.com/go/ap500 . Cannot mix AP541N and AP 521 APs at a single site.
Wireless LAN controller required?	<input type="checkbox"/> WLC 526 (max of 2)	

Basic Network Information (Single Site)**Table 3.** Site Survey — Basic Network Information

Network Information	Requirements/Options	Notes
WAN Edge Device	<input type="checkbox"/> UC 500 Series <input type="checkbox"/> Secure Router SR 500 Series <input type="checkbox"/> SA 500 Series Security Appliance	This is the device that is directly connected to the Internet.

Table 3. Site Survey — Basic Network Information (Continued)

Network Information	Requirements/Options	Notes
WAN Connection Type	<input type="checkbox"/> DHCP <input type="checkbox"/> Static IP IP Address: <input type="checkbox"/> PPPoE <input type="checkbox"/> PPPoE w/ Negotiated IP	Static IP is required for VPN termination.
DNS Server IP Addresses	Primary: Secondary:	Primary DNS server IP is required.
Data LAN DHCP Server	Enable <input type="checkbox"/> Disable <input type="checkbox"/>	If disabled on the UC500, some other device must provide this functionality.
Data LAN Subnet	UC 500 <input type="checkbox"/> Use Default <input type="checkbox"/> Custom: SR 500 <input type="checkbox"/> Use Default <input type="checkbox"/> Custom:	Can only be customized through the Telephony Setup Wizard or Multisite Manager. Default Data VLAN subnet is 192.168.10.1/25 for the UC 500 and 192.168.75.1/24 for the SR 500.
Voice LAN Subnet	UC 500: <input type="checkbox"/> Use Default <input type="checkbox"/> Custom:	Can only be customized through the Telephony Setup Wizard. The default is 10.1.1.1.
DDNS Required?	<input type="checkbox"/> Yes <input type="checkbox"/> No If Yes: Provider: DDNS host name:	Only required for multisite deployments that use DHCP to obtain the WAN IP address

Existing Network (“Greyfield”) Deployment Considerations

For more in-depth discussion and instructions, see the Technical Enablement Labs, available on the Cisco Small Business Support Community at: <https://www.myciscocommunity.com/docs/DOC-10395>

Table 4. Site Survey — Greyfield Deployment with Existing Network Information

Network Information	Requirements/Options	Notes
Deployment Scenario	<input type="checkbox"/> UC 500 behind ALG -capable firewall <input type="checkbox"/> UC 500 behind a firewall, no ALG support <input type="checkbox"/> UC 500 located in the firewall's DMZ <input type="checkbox"/> Firewall deployed on the UC500's DMZ	Typically requires opening access to ports and protocols and deleting firewall/DMZ settings on the UC 500. For more information, see <i>Integrating the UC500 into an existing Network</i> , available on the Cisco Small Business Support Community at: https://www.myciscocommunity.com/docs/DOC-5869
DHCP Server	<input type="checkbox"/> UC 500 with existing DHCP server	Disable/delete DHCP server on UC 500

Table 4. Site Survey — Greyfield Deployment with Existing Network Information (Continued)

Network Information	Requirements/Options	Notes
VLAN settings	<input type="checkbox"/> Change default VLAN settings Voice VLAN: Data VLAN: Guest VLAN: (if wireless is enabled):	Default voice VLAN is 1 (cisco-voice) Default data VLAN is 100.

Wireless Network and Device Information

Table 5. Site Survey — Wireless Network and Device Information

Wireless Information	Requirements/Options	Notes
Wireless Coverage Survey	Total Area: Conduct a wireless site survey to define coverage area to determine placement of wireless access points at the customer site.	Refer to the <i>7921 Phones in SBCS Environment Configuration Guide</i> , available on Cisco.com at the following URL: http://www.cisco.com/en/US/products/ps7320/products_white_paper09186a0080973d69.shtml
Wireless Encryption Type	<input type="checkbox"/> WPA2 (WPA-PSK) <input type="checkbox"/> WEP Other:	WEP and WPA are not recommended. Use WPA2 (WPA-PSK) instead.
Service Set ID (SSID)	SSID name(s):	Default SSID for wireless voice is cisco-voice. Default SSID for wireless data is cisco-data
Guest Access Required?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Number and Model of Wireless IP Phones	<input type="checkbox"/> SPA 525G <input type="checkbox"/> 7921 <input type="checkbox"/> 7925	The presence of wireless IP phones (7921 or SPA 525G phones has different design implications. For more information, refer to the <i>SBCS 1.6 SPA525G Wireless Deployment Guide for Cisco SBCS (OL-18871-01)</i>
Radius Authentication Server	<input type="checkbox"/> Not required <input type="checkbox"/> External <input type="checkbox"/> Local IP Address:	

Security Information

Table 6. Site Survey — Security Information

Security Information	Requirements/Options	Notes
Secure Router SR520 present or required?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Secure Router SR 500 Series devices requires a different set of configurations for security.
Advanced Security Features	<input type="checkbox"/> IPS (Intrusion Prevention System) <input type="checkbox"/> URL Filtering	<p>IPS and URL filtering available on SR 500 Series Secure Routers and SA 500 Series Security Appliances only.</p> <p>IPS and URL filtering are licensed security features. If configuring on SR 520-T1, requires FL-SR520-T1-SEC Security Feature License.</p>

Secure Remote Access

Table 7. Site Survey — Remote Access Information

Remote Access Information	Requirements/Options	Notes
VPN Server Configuration		
Remote Site Access required?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Allow Internet access from remote VPN sites using VPN server WAN connection
VPN Type	<input type="checkbox"/> SSL-VPN <input type="checkbox"/> EZVPN	Static WAN IP is required for VPN termination
VPN User Accounts for remote access	List VPN usernames and passwords for VPN access	Default is cisco/cisco
Number of VPN connections	VPN Connections (default is 10)	Although you can configure more than 10 VPN connections, the maximum number of simultaneous connections is 10. This restriction currently applies to all UC 500 platforms: UC 520, UC 540, UC 560.
VPN Remote IP Range	From: To:	Optional
VPN Tunneling Mode	<input type="checkbox"/> Full-Tunnel <input type="checkbox"/> Split Tunnel	<p>IMPORTANT If split tunneling is enabled, make sure that you include the voice subnet (default 10.1.1.0/24), CUE subnet (10.1.10.0/30), SR 500 data subnet (192.168.75.1/24), UC 500 data subnet (default 192.168.10.1/24), and any other multisite data subnets to the list of allowed subnets.</p>
Port Forwarding Rules — Allowed Protocols	<input type="checkbox"/> POP3 <input type="checkbox"/> IMAP <input type="checkbox"/> SMTP <input type="checkbox"/> SSH	Allowed protocols for thin-client mode SSL-VPN

Table 7. Site Survey — Remote Access Information (Continued)

Remote Access Information	Requirements/Options	Notes
DNS IP Address	Primary: Secondary:	Primary is required; secondary is optional.
Remote Teleworker Setup needed?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Basic Voice Configuration

Table 8. Site Survey — Basic Voice Configuration

Field	Requirements/Options	Notes
Voice System Type	<input type="checkbox"/> PBX <input type="checkbox"/> Keysystem	Refer to the <i>Cisco Smart Business Communications System Administrator Guide</i> for voice system configuration details.
PSTN Trunk(s)	<input type="checkbox"/> BRI <input type="checkbox"/> PRI <input type="checkbox"/> T1/E1 <input type="checkbox"/> FXO	Obtain information for trunk settings and phone numbers from Telco.
Analog Lines	<input type="checkbox"/> Common area phone(s) <input type="checkbox"/> User phones <input type="checkbox"/> Fax	
SIP Trunk	SIP Trunk Provider:	Obtain SIP trunk configuration requirements from the Service Provider. See the CCA administration guide or online help for more information.
Key System Configuration	Number of phones: Number of shared lines:	Number of phones participating in the shared-line configuration and number of shared lines on each phone. The number of buttons required on each phone participating in shared line configuration is equal to the number of shared lines + 1 (one button is reserved for the primary extension).
Number of Digits per Ext	<input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 Other:	Number of digits per extension; cannot be changed without resetting UC 500 to system defaults.
Region Settings	Region Call Progress Tone Phone Language Voicemail Language Date Format Time Format System Message	Voice system region settings for the desired locale

Table 8. Site Survey — Basic Voice Configuration (Continued)

Field	Requirements/Options	Notes
Ringling Options	<input type="checkbox"/> User Extension (s) <input type="checkbox"/> Auto Attendant <input type="checkbox"/> Voice mail <input type="checkbox"/> Hunt Group <input type="checkbox"/> Basic ACD <input type="checkbox"/> Other Phone:	Destination for inbound calls Plan the mapping between PSTN DID numbers and internal user extensions, groups, AA, or operator.
Dial Plan	Locale: Access code for external calling: Other locale-specific dial plan settings.	Country-specific dial plan configuration (local dialing, long-distance dialing, and so on)
Calling permissions?	List requirements for calling permissions	Phones can be configured to only allow certain calling permissions (class-of service restrictions)
Call blocking required?	List numbers to be blocked for outgoing calls	Also requires Block Restricted Calls to be enabled on phones
Emergency CLID	Number:	Calling line ID for emergency services
Caller ID	<input type="checkbox"/> Use Main PSTN number <input type="checkbox"/> Set per-phone caller ID	See the CCA administration guide or online help for current Caller ID options
User Extensions	Record user first name, last name, ID, and password. You can also perform a bulk import of this information using the sample.csv file provided in the CCA installation.	Use the sample.csv file as an example for assembling phone user information. This file is located in the C:\Program Files\Cisco Systems\CiscoSMB\Cisco Configuration Assistant\appdata directory, if you installed CCA to the default location.

Voice Feature Requirements

Table 9. Site Survey — Voice Feature Requirements

Voice Feature Requirements	Requirements/Options	Description/Notes
Business Hours (Half-Hour Increments)		
Open Hours		Default business hours are 8am to 5pm, Monday through Friday.
Monday	From: To:	
Tuesday	From: To:	
Wednesday	From: To:	
Thursday	From: To:	
Friday	From: To:	
Saturday	From: To:	
Sunday	From: To:	

Table 9. Site Survey — Voice Feature Requirements (Continued)

Voice Feature Requirements	Requirements/Options	Description/Notes
Holidays		
Holiday Name/Date		List of holidays for creating business schedules (up to 26 allowed); required for AA and Night service.
Night Service Hours		
Monday	From: To:	Only required if Night Service is configured.
Tuesday	From: To:	
Wednesday	From: To:	
Thursday	From: To:	
Friday	From: To:	
Saturday	From: To:	
Sunday	From: To:	
Auto Attendant Settings		
AA Mode	None <input type="checkbox"/> Standard <input type="checkbox"/>	
AA PSTN Number	Number:	
AA Internal Extension	<input type="checkbox"/> Use Default <input type="checkbox"/> Use Custom	
AA Script	<input type="checkbox"/> Use Default (aa_sbc_v02.aef) <input type="checkbox"/> Use Custom	In most cases, the default script, aa_sbc_v02.aef, which supports multi-level AAs, multiple AAs, and other features, is recommended.
Number of AAs	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3	
Multi-Level Menus required?	<input type="checkbox"/> 1 level <input type="checkbox"/> 2 levels <input type="checkbox"/> 3 levels	
AA Key Mappings	Key Pressed — Option/Action 1 2 3 4 5 6 7 8 9 0 * #	Available actions include: <ul style="list-style-type: none"> ▪ Transfer to VM ▪ Transfer to extension or other number ▪ Transfer to BACD, if configured ▪ Transfer to hunt group, if configured ▪ Play prompt ▪ Menu
AA Prompt Management	<input type="checkbox"/> Use Default Prompts <input type="checkbox"/> Record Custom Prompts Prompt Mgmt User Ext# (if used)	Note number and type of custom prompts. These can be recorded using the CCA built-in sound recorder or by setting up a prompt management user.

Table 9. Site Survey — Voice Feature Requirements (Continued)

Voice Feature Requirements	Requirements/Options	Description/Notes
Voicemail Settings		
VM Access Extension	<input type="checkbox"/> Use Default <input type="checkbox"/> Use Custom:	
VM Access PSTN Number	Number:	
Enable Voice mailboxes for all users?	<input type="checkbox"/> Yes <input type="checkbox"/> No	You can disable voicemail on a per-user basis; users created with CFB or CFNA set to VM (the default) will have a personal mailbox.
Call Forward (CF) Settings		
CF Busy	Destination:	VM, AA, extension, hunt group
CF No Answer	Destination:	VM, AA, extension, hunt group
Hunt Groups		
Hunt Groups needed?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
Number/type of hunt groups	Hunt Groups (up to 10 total) <input type="checkbox"/> Sequential <input type="checkbox"/> Longest Idle <input type="checkbox"/> Peer Call Blast groups (up to 10) <input type="checkbox"/> Call Blast Groups	Call blast groups are the same as parallel hunt groups (simultaneous ring).
Other Voice Features		
Call Pickup required?	<input type="checkbox"/> Yes <input type="checkbox"/> No Number of groups (max 8):	
Paging Groups?	<input type="checkbox"/> Yes <input type="checkbox"/> No Number of groups (max 4):	
Call Park required?	<input type="checkbox"/> Yes <input type="checkbox"/> No Number of slots (max 8):	
Intercom required?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Music on Hold?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Voice Conferencing?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> MeetMe <input type="checkbox"/> AdHoc	
Single Number Reach required?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Not supported on all phones.
ACD (Automated Call Distribution) required?	<input type="checkbox"/> Yes <input type="checkbox"/> No Number of BACD groups: (up to 10) Pilot Numbers:	Basic ACD is supported through CCA; see the chapter on Basic ACD in the <i>Cisco Configuration Assistant Smart Business Communications System Administrator Guide</i> or online help for configuration details.
Voice Applications		
Call Detail Recording	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Unified Messaging (IMAP Integration)	<input type="checkbox"/> Yes <input type="checkbox"/> No	
VoiceView Express	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Table 9. Site Survey — Voice Feature Requirements (Continued)

Voice Feature Requirements	Requirements/Options	Description/Notes
LiveRecord	<input type="checkbox"/> Yes <input type="checkbox"/> No	
TimeCardView	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Additional Service URLs	<input type="checkbox"/> Yes <input type="checkbox"/> No	For 3rd-party application support
Smart Call Connector	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Operator Console	<input type="checkbox"/> Yes <input type="checkbox"/> No	

For More Information

For more information on Cisco SBCS, visit the Cisco SBCS marketing web site at the following URL:

www.cisco.com/go/sbcs

For more information on using Cisco Configuration Assistant, visit the following URL:

www.cisco.com/go/configassist

For more information on Cisco SBCS solutions, visit the SBCS Support Wiki at the following URL:

supportwiki.cisco.com/sbcs

For more information on the Cisco SR520, visit the following URL:

www.cisco.com/go/sr500

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