Upgrades Option Selection
- Earlier Versions of CM

Audience: AVAYA and Partners
Customers should leverage the Avaya Services team for this process

Module Scope: This process shows the conversion and upgrade option for early versions of CM which are in RFA and would like to upgrade to CM 6 and beyond which are in PLDS.
CM6.0 Migrations and Upgrades

- The process for CM upgrades **always** requires an order.
  
  This means a design must be completed even in the case that an Upgrade Advantage entitlement exists.
  
  Be sure to have the order information with you before going into PLDS to do the upgrade.

- Customers upgrading to CM6.0 will need to have their pre-CM6.0 license entitlements migrated from RFA to PLDS
  
  - CM5 and earlier systems in RFA stay in RFA
  
  - CM license records in RFA are converted to PLDS one at a time as each individual CM system upgrades to CM6.0 or above
    
    - Customers will have Avaya Services or a Partner complete the conversion process.
    
    - This process will not be self servicing for an End Customer
    
    - Some Partners may choose to have Avaya Services complete this process for them as well.
      
      Go to [https://sales.avaya.com/en/general/professional-services-contracting](https://sales.avaya.com/en/general/professional-services-contracting) for details on how to request this service from Avaya.

  - Conversion is done in PLDS, not in CM software
  
  - Conversion includes CM, Call Center (CC) and CM Messaging (CMM) entitlements

- CM 6 upgrades will required a two step process for the conversion and upgrade of the RFA licenses.
CM7.0 Migrations and Upgrades

- Upgrades from CM R5 to CM R7 should use the same (process and steps) as the upgrades from CM R5 to CM R6 except there are different offers at CM R7.

- Upgrades from CM R6 to CM R7 in PLDS are just regular upgrades (no conversion, no 2 step process).

  - The standard upgrade process requires you to upgrade all quantities from one release to the next release – you cannot have entitlements for more than 1 release on a license host/license file. If the customer doesn’t want to do that for some reason, they have to deactivate quantities first.

  - There are multiple CM R6 offers that can upgrade to multiple CM R7 offers (with business constraints around which R6 offers can upgrade to which offers at R7).

  - To upgrade to multiple R7 CM offers you need to upgrade to 1 offer at a time; The PLDS upgrades for R6 to R7 just follow the regular upgrade process and if someone wants to upgrade to different offers at R7, they have to deactivate certain entitlements/quantities first, and complete the upgrade to each R7 offer, one at a time.
Step One: Converting the CM 5 and Earlier License Record from RFA to PLDS Entitlement
You will notice that both CM6 Aura Standard and Enterprise editions will have certain bundle codes that will blow out into a series of other codes such as the one displayed here.

1. CM version migration from RFA to PLDS will be initiated by the activation of the RFA Conversion material code on CM6.0 migration order.
1. The order code will result in a PLDS entailment which must be activated first.

You can search for your records to ensure the migration code was transmitted, by going to:
Assets > View Entitlements > Advance Search > Enter order number in the Sales/Contract # field > and click Search Entitlements.
CM6.0 Migrations – Migrating your RFA Record to PLDS

1. From the PLDS home page go to:
2. Activation > Activate
1. Enter the LAC code you received via email or that you searched for in the previous process.
2. Click Search Entitlements.
1. Select only the first Entitlement titled: Activate First: Avaya Aura TM RFA to PLDS Conversion.
2. Click Activate.

The list presented will include all of the entitlements generated from the upgrade order. The “convert from RFA” entitlement, 231820, will always appear as the first entitlement in the list displayed.
1. The user is required to select the Host.
2. If the desired host is not listed or found, click Add a License host to create a new Host.

The user is not required to provide the actual license host number, this step is only to name the license host. The actual host ID will be requested further in this activation process.
1. Select the correct group to activate the entitlements to.
2. Click Next.
11. Enter the new CM 6 Host ID (MAC).
2. Enter the RFA SID.
3. Enter the RFA Serial Number.
4. Click Next.
1. Verify that the RFA customer is correct, and change the SID/Serial number if not.

2. Click Next, if everything is correct.
1. Add email address and Notes if needed.
2. Click Finish.
1. Verify the completion of the Migration process. Now you must wait 20 minutes before continuing with the upgrade process in PLDS.
Step Two: Upgrading the Converted Entitlements to CM 6 and above
CM6.0 Migrations - RFA to PLDS Conversion

What will you see as you begin this process:

- PLDS will create additional entitlements from the RFA SID data. These additional entitlements can now be upgraded by applying the upgrade order entitlements to them.
- Some of the entitlements brought over from RFA can be applied along with the order entitlements just as they are, meaning they come with the upgrade but do not need to be upgraded.

Things you should know prior to beginning this process:

- The LAC from the order was used to create the entitlements brought over from RFA. The entitlements created from the RFA SID will have the same LAC as the entitlements created from the order.
- Based upon what you are upgrading, you may need to deactivate licenses that are not being upgraded. See the PLDS Job Aid located at [https://sales.avaya.com/documents/1399616704784](https://sales.avaya.com/documents/1399616704784) for step by step instructions on how to deactivate licenses:
1. Review the entitlements created from the Upgrade order along with the entitlements created from the RFA SID.

You can search for your records to ensure the migration code was transmitted, by going to:
Assets > View Entitlements > Advance Search > Enter order number in the Sales/Contract # field > and click Search Entitlements.
1. From the PLDS home page go to:
2. Activation > Activate
1. Enter the LAC code you received via email or that you searched for in the previous process.
2. Click Search Entitlements.
1. Select all of the appropriate entitlements to activate at this time.
2. Click Activate.
3. The entitlements will be all of the entitlements from the order, which are the upgrade entitlements and the new entitlements for the bundle.

NOTE: There are specific rules here for what combinations could be activated together, the rules will be defined in product documentation.
1. Select the host that was added at the time of the migration.
1. Validate the primary user, or change it as needed.
2. Click Next.
CM6.0 Migrations – Upgrading Your Migrated Entitlement

1. Select the appropriate upgrade path from the dropdown.
2. Click Select.

See Slides 31-33 for further help making a selection here.
CM7.0 Migrations – Upgrading Your Migrated Entitlement

1. Select the appropriate upgrade path from the dropdown

2. Click Select

See Slides 31-33 for further help making a selection here.
1. Update the number of entitlements you want to upgrade.
2. Click Apply.

The reason the user may want to change the entitlement numbers to upgrade is because they might want less entitlements at the new release. They might also want to leave some of the entitlements at a lower release.
CM6.0 Migrations – Upgrading Your Migrated Entitlement

1. Select Apply Paid Upgrade Entitlement from the Proof of Upgrade Options drop down.
2. Click Select.
3. Click Apply, and Next when ready.

The upgrade screen will display the LAC and the upgrade entitlements from the order. Notice the “Qty Provided” is 0 for all of the entitlements.
CM6.0 Migrations – Upgrade Quantities

- Upgrade quantities **must** match before starting the upgrade transaction.
- The full quantity of the active lower release entitlements must be upgraded.

When the Upgrade quantity is less than the lower release entitlement quantity (converted from RFA)

This would be a case when the customer does not want to upgrade the full converted (release 5 and lower) entitlement quantity to the next release.

- Deactivate the converted entitlement quantity that you do not want to upgrade to R6 or greater. The active entitlement quantity remaining should match the full quantity you want to upgrade.
  - **Note:** If this step is not executed first (deactivation), the upgrade transaction will error. The customer cannot change the quantity to upgrade during the upgrade transaction. The error is generated because there would be active entitlements for 2 different releases, which is not supported.
  - If the customer gets the error, then they would have to exit out of the upgrade transaction and execute the deactivate.
  - Proceed with the upgrade transaction and upgrade the full quantity available at the lower release.

When the Upgrade quantity is greater than the lower release entitlement quantity (converted from RFA)

- If the older release entitlements from RFA have a quantity less than the upgrade entitlements the quantities on the upgrade screen will adjust to make the Quantity Needed match the Quantity Provided. This will ensure that the upgrade will not allow more to be upgraded than the quantity from the older release.
1. Enter the quantity to activate for any new entitlements that were on the order and were selected on the Activate Entitlement List.

2. Click Next.
1. Review Warnings.
2. Click Next.
1. Add email address and Notes if needed.
2. Click Finish.
1. View, download, email license file details.
<table>
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<th>Description of Job</th>
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<td>Paid Upgrade Order - Core Suite</td>
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<td>This is a Subscription Upgrade Job to upgrade CM licenses converted from RFA to CM R6 Core Suite offer.</td>
<td>Subscription Upgrade Order - Core Suite</td>
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<td>This is an Entitled / Free Upgrade job to upgrade CM licenses converted from RFA to CM R6 Foundation Suite offer.</td>
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<td>This is a Paid Upgrade job to upgrade CM licenses converted from RFA to CM R6 Standard / Enterprise offer.</td>
<td>Paid Upgrade</td>
<td>No</td>
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