AVAYA ONE SOURCE SOFTWARE MANAGEMENT TOOL

**Purpose**

Guides Business Partners through the step-by-step process to generate a Network View of Avaya Software License and Support Entitlement for their end customers with the Avaya One Source Software Management Tool (A1S SMT).

**Scope**


**Target Audience**

Partners, Distributors, Avaya Associates.

**Tools**

Product License and Software Delivery System (PLDS), Remote Feature Activation (RFA), Keycode Retrieval System (KRS), SAP, Clarify, Consolidated Services Quote Tool (CSQT)/A1S Renewals.

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Overview

The Avaya One Source Software Management Tool (SMT) Release 2.0 provides key functionality to assist Business Partners and Avaya Associates in generating value from their customers’ install records of Software License and Maintenance Service contracts.

A1S SMT provides a portal to install records to assist partners in comparing these to their end customer systems and pathways, ensure the records align with the installed configuration and request any changes to align or update the records.

The following summarizes the benefits of SMT.

A single and easy point of access to hNortel and hAvaya Software License and Maintenance Service records.

- Provides a single, holistic view of an end customer’s estate of Software Licenses and Services Contracts for all their locations collated from Avaya’s license and contract tools (PLDS, RFA, KRS, CSQT and Clarify).

- Generates Summary or Detail reports at an individual application or site throughout to entire end customer estate or multi-customer estates.

A valuable tool to identify and target commercial campaigns or contractual policy alignment via the SMT Advanced Search of Software License and Contract records.

- Advanced Search enables search by application type or application release to identify migration, refresh and upsell campaigns.

- Combine with Network View per end customer to ensure upgrade alignment to a specific release across the network.

- Track usage of Temporary Licenses for “try and buy” campaigns.

- Identify locations with applications uncovered by Maintenance Service contracts.

An easy method to logically organize and link all records for an end customer and validate the install information as a correct representation of the end customer’s estate.

- SMT introduces the concept of an “end customer network,” enabling authorized users to link all records from accessible systems via a geographic network structure. All Business Partners with access to records for that end customer can share, add to and produce Summary and Detail reports.

- An end customer network can be viewed by multiple resellers, however, an access control filter limits user views to only those records that the user is entitled to view and edit.
User Roles

The A1S SMT portal supports the following user roles.

**Non Avaya user:**

- Business Partner (Disti/Tier 1 and Tier 2); Read-Only role
- Business Partner (Disti/Tier 1 and Tier 2) Admin; can create A1S SMT Networks
- End customer (Direct business)
- End customer (Direct business) Admin; can create A1S SMT Networks

**Avaya user:**

- Avaya Associate; Read-Only role
- Avaya Associate Admin (targeting Sales Engineers); can create A1S SMT Networks
- Avaya Application Admin (targeting IT Help Desk)
- Avaya System Admin (Targeting IT Tier 3 and Tier 4)

Multiple admin roles are able to:

- Add Network Nodes or Product (Sold To (ST)/Functional Location (FL)) to an existing network.
- Edit a Network Node or Product (ST/FL) of an existing Network.

Important consideration for the admin users:

- When admin users add ST/FL records to a new or existing Network Node, other Admin users can edit/modify that ST/FL, but they must be from the same Business Partner, Disti or Direct end customer as the original editor.

- An admin user can edit the Global, Regional, Country and Local Network Nodes on a given network if they or their colleagues from the same Business Partner, Disti, and Direct end customer were the original editor. Other Admin Business Partner, Disti and Direct end customers can add Network Nodes or ST/FL records to the network created by other Business Partners. These cannot be edited by the original Business Partner that created the network, but only by the Business Partner that added the specific Network Node or ST/FL record to the network.

- Users who did not create the Global, Regional, Country and/or Local Network Nodes will have view only access to those nodes.
Duplicate Global, Regions or Country Nodes are not allowed.

Exceptions

The following applications cannot be included in ST/FL records:

- Avaya Data Division products that are not licensed via PLDS
- Tenovis products that are not licensed via PLDS
- Atlas SAP entitlements
- ADI licenses
- License management
- Multi-language support
- End company users (except self-service direct end customers)

Obtain Access to A1S SMT

In order to access A1S SMT users need to have an Avaya Single Sign-On, access to Avaya One Source. In addition, users may require access to other applications, such as PLDS, KRS and RFA. Users should also possess applicable product knowledge. A1S SMT access is consistent with access rights available in KRS, PLDS and RFA Licensing Tools.

Business Partners need customer authorization defined via the Customer Authorization Tool (CAT). CAT is used by Business Partners to request customer authorization to access their FLs/STs.

BPs authorization to view FL/STs in PLDS based on the information on their SSO profile. SSO will in turn query GAI and CXP access control databases to access to end customer records.

Registered users with access to Enterprise Configurator will have read only access to SMT by default. Request read/write access via ITSS.

Obtain Access to SSO

1. Go to Avaya Single Sign-On management to request or verify SSO access.

Obtain Access to Avaya One Source

Users need access to Avaya One Source via Enterprise Configurator. Registered users with access to Enterprise Configurator will have read only access to SMT by default. Request read/write access via ITSS.

1. Go to UAE and complete the registration form.
2. Select one Enterprise Configurator checkbox, whichever is appropriate based on your region or theater.

3. Scroll to the bottom of the screen and click on [Submit]. UAE submits this request and notifies the requester within five business days of EC access.

**Obtain Login or Access Support for SMT**

For SMT login issues after UAE registration is approved, raise a case with the Avaya Business Partner Help Desk either via phone or ITSS.

Before raising an ITSS ticket verify the following:

- User has access to Enterprise Configurator after requesting access via the UAE registration process.
- User has logged into A1S SMT once after getting access to Enterprise Configurator.

If an ITSS ticket is raised before the UAE registration process is completed, the Avaya Business Partner Help Desk will close the ticket without resolving the request.

In addition to access to EC, users need to ensure they have the correct role to use A1S SMT effectively. Business Partners who need to perform Admin activities need to request the role access by calling the Avaya Business Partner Help Desk or by raising a request through ITSS.
Obtain Access to Licensing Tools

In addition to access to SMT, users also need access to PLDS, RFA and KRS to view license records in A1S SMT that are maintained in these tools.

Obtain Access to PLDS

An SSO login is required to access PLDS.

1. Go to the Avaya Support site.

2. From the My Information tab select SSO Login Profile.

3. Select View/Request Roles.
4. Check the PLDS User box and click on [Save].
Obtain Access to KRS

1. Log in to UAE.

2. Select **KRS (Production)** by checking the box.

![Keycode Retrieval System (KRS) (Production)](image)

Scroll to the bottom of the page and click on [Submit].

User is notified of the access.

Obtain Access to RFA

1. Go to the Avaya One Source Landing Page.

2. Select **RFA-Remote Feature Activation** from the **Licenses** menu.

3. Click on **Introduction to RFA Registration Process** and follow the instructions:
User is notified of the access.

**Request Support**

**Request New or Changes to a Company Number**

Assistance from Avaya IT is required for a new Company Number or to make a change to a Company Number. A Company Number is also known as an Avaya Hierarchy Number (AHN) or Siebel Parent number.

**Business Partners/Customers (External Only)**

Submit a request by calling the Avaya IT Support line. Support is available during normal regional business hours. A ticket number is provided upon creation of the request. Note the ticket number for reference in any further communications with support.

**Avaya IT Support**

US +1 866 AVAYA IT (+1-866-282-9248) or 720-444-0130

EMEA Region: +44 1483 309800.

Canada, APAC and CALA Regions: +1 720 444 0130.

Germany Associates: +49 69 7505 1234.

+65-6872-8700 (Singapore)

+54-11-4118-4901 (Argentina)

+55-11-5185-6700 (Brazil)

+57-1-592-2805 (Colombia)
Avaya Associates (Internal Only)

Avaya associates can create service request online via ITSS. Choose Request Service, search by keyword “Hierarchy,” then follow the prompts for the available options.

**Note:** Requests to move a record (FL/ST) from Company Number X to Y may require Avaya to validate the request with the end customer. The use of multiple Company Numbers may be a commercial strategy to subdivide the end customer business into regions or business units. Pooled Licenses and user access utilized by this FL/ST may be associated with one Customer Number but not the other. Changing Company Numbers can require significant downstream re-alignment activity.

These limitations do not usually apply when requesting a Customer Number to be added to an FL/ST where no previous number exists.

**Request changes to Company Name and Address Moves or Changes**

To request changes to an FL/ST Company Name and Address, submit a request (SSR) via Partner Relationship Management (PRM).

**Request Changes to Service Contract Details**

For changes or corrections to Service Contract details stored in CSQT, raise an incident (ticket) in ITSS for CSQT Service.

**Request Changes to Software License Details**

For changes to Software License details stored in PLDS, KRS or RFA, raise an incident (ticket) in ITSS for the relevant service.
Request Support for System Quality-Related Issues

To report issues with A1S SMT functionality, raise an incident (ticket) in ITSS for the Software Management Tool (SMT) Service.

Work With A1S SMT

Access SMT

Valid SSO credentials and access to Enterprise Configurator in UAE are required to access the Avaya One Source Landing Page.

1. To access the Avaya One Source Software Management Tool, go to the Avaya One Source Landing Page by one of the following links, as applicable:
   - www.avaya.com/ebizn (Americas, CALA and APAC)
   - www.avaya.com/ebizu (EMEA)

2. Enter your SSO credentials, then click on [Submit].
SSO authenticates the user via A1S/UAE and displays “Invalid ID or Password” if it is unable to validate the user credentials.

Once the user is authenticated the Avaya One Source Landing Page displays.

If the user is not registered with A1S Configurator, the following error message displays. Click on the link to go to the registration site.
3. From the A1S Landing Page, select **SMT-Software Management Tool** from the **Licenses** menu.

A1S SMT opens.

**Build a Network**

Users can create a Network Node from the A1S SMT Home Page.
1. From the A1S SMT Network Home Page, select **CREATE NEW NETWORK**.

![Software Management Tool – Network](image)

**Note:** If this link is not visible you have “read only” privileges. Request read/write access to A1S SMT via an **ITSS Ticket**.

The Create New Network form displays.

2. Complete the **Network Name** field, then click on [CREATE].

![Create New Network Form](image)

A1S SMT creates the highest (top) level of Network Node.

3. Click on [CONTINUE] to add nodes.

![Create New Network Confirmation](image)

A1S SMT allows users to add nodes to the Network Node, such as regional, national and local nodes. Regional Nodes are added to the Network Node and National Nodes are added to the Regional Node.

4. Select the **Select Node Type** as Regional and complete the **Region Name** field.
5. Click on [CREATE].

6. To add more Regional Nodes click on [ADD MORE] and repeat the last two steps.

7. To add a National Node, set the Select Node Type as National, then select a Region from the drop-down list. Locate and select a Country. Click on [CREATE].
The Country Node is created under the Regional Node.

8. To add National Nodes to another Regional Node click on [ADD MORE] more and repeat the previous step.

9. To continue work with nodes, select a node then:
   - Click on **Edit** to edit.
   - Click on **Add** to add nodes.
   - Click on **View** to view the audit log.

10. If the end customer is operating in one country only, select the **Country** for the first (top) node of the network. All subsequent nodes will auto-select their level based on the node above.

11. Select **Local** in **Select Node Type**.
12. Complete the **Local Name**, select **Region** from the drop-down list and **Country** from the drop-down list, then click on [CREATE].

A Network Node containing Regional, National and Local nodes is created.

A1S SMT saves the Network Node changes to a database and updates the Audit Log.

To view the Network hierarchy from the A1S SMT Home Page, perform a search to locate the Network Node.

**Add ST/FL Records to a Network Node**

One end customer Network on A1S SMT is defined by one Customer Number (Parent Hierarchy Value). Only an FL/Site ID/SID with the same Customer Number can be added to a single Network.
All Customer facing tools get the Hierarchy value from following prioritized locations:

- Avaya Hierarchy Node (AHN) – Maintained in UCM.
- DandB Hierarchy Node (Avaya defined from Dun and Bradstreet Business Information).
- SAP Hierarchy Node (Avaya defined from SAP).
- Local Hierarchy Node if no parent Hierarchy, then the FL must be used (one record per A1S SMT Network).
- If there is a Hierarchy value change in UCM and the FLs under the ‘old’ Hierarchy value are associated with an A1S SMT Network, then A1S SMT will automatically move the FLs to the Global Level of the Network associated with the new Hierarchy or return them to the no Network pool if there is no A1S SMT Network for the new Hierarchy value.
- Users will subsequently have to move the FLs from the Global level to the appropriate level Node in the Network.
- These transactions are stored and viewable in the transaction log.

A1S SMT allows users to move License records from one Node to another Node within a Network.

1. On the Network View screen, select **Search** or **Advanced Search** to locate License records.
2. Enter the FL number in the **FL** field. Complete any additional search fields.
3. Click on [SEARCH].

   Enhanced Advanced Search provides the users with the options to search for a record easily.

   **Note:** Advanced Search uses an “OR” criteria to filter results, e.g. Customer Name X and Application Y will result in all records for Customer X and all applications of type Y for all customers.

4. If License records are displayed, select the checkbox on left side to select the record(s) to be added to the Network Node.

   ![Image of the Advanced Search interface]

   **Note:** If License records are not found, check authorization in PLDS/CAT or KRS and request access accordingly. Only Authorized Business Partners are able to view license records. See *Obtain Access to Licensing Tools* to request authorization.

5. Click on [MOVE].

   The Move Locations form displays.

6. Select the desired Network Node from the drop down list and click on [MOVE].

   ![Image of the Move Locations interface]

7. To move more records to a Network Node, repeat these steps.

   The Transaction log of the action/owner is updated and saved. All changes are recorded in the Audit log.
Edit or Delete Network Node

A1S SMT allows users to rename or delete a Network Node.

1. Locate for the desired Network.

2. Select the Network Node to be edited or deleted.

3. Click the **Edit** (pencil) icon to the right of the Network Node to rename or delete it.

**Note:** If the user is not authorized (no read/write role), an error message displays and the Network form functionality is disabled (grayed out). Request read/write access via an [ITSS ticket](#).

A1S SMT displays the Edit Node form.
4. Complete the **Rename** field with the new name, then click on [UPDATE].

The Network Node is renamed.

5. To delete a Network Node, select the node, then click on the Edit (pencil) icon. Click on [DELETE] from the Delete Action dialog, then click on [DELETE] again.

The selected Network Node and any child Nodes are deleted.
A1S SMT saves changes in a database. All changes are recorded in the Audit log.

Add a New Node to a Network

A1S SMT allows users with Read/Write access to add one or more new Nodes to a Network.

1. Locate the desired network.

2. Click on ‘+’ icon next to the appropriate Network Node. Nodes will be added directly below the selected Network Node.

The Add New Node form displays.
3. Complete the Local Name field with the new name. Alternatively, select a Country for a new National Level Node. Click on [CREATE].

The new node is added to the network.

The changes are saved in the A1S SMT database. All updates are recorded in the Audit log.

**Move Records Between Network Nodes**

A1S SMT allows users with read/write access to move records from one Network Node to another within the same network. You can move the record within the Network Node or remove the record from the Network Node.

1. Open an existing Network View.
2. Select the Network Node that contains the record name to be moved.

3. Select the checkbox to the left of the record(s) to be moved.

4. If the move is to another location in this network, select the target Network Node name from the Move To menu.

5. If you only need to remove the record from this network, select Unassign from the Move To menu.

6. Click on [MOVE].
The record is moved to the requested Network Node.

Updates are saved in the A1S SMT database. All updates are recorded in the Audit log.

**Search for a Network**

You can locate a network by performing a search from the simple Search or Advanced Search forms from the A1S SMT Network Home Page.

1. In Advanced Search, multiple search criteria are permitted. Include multiple search values, separated by commas, in either the Search or Advanced Search fields.

2. Click on [SEARCH].
Results are displayed on the Network Home Page.

3. Click on the Network Node hyperlink of a record to go to its Network View.

**Generate a Report Within Network View**

From A1S SMT you can generate a report of one or more Network Node records. Additionally, you can send the reports via email or download to PDF or MS Excel.

1. Select the Network Node level that contains record(s) to be reported.

2. Select the checkbox to the left of the record or records to include, then click on [GENERATE REPORT].
3. If desired, select specific records (FLs) to be included in the report.

4. Click on [GENERATE REPORT].

5. On the Application Report form, select a report type from View Options drop-down list.

   Note: “Summary” reports at the Application level and “Details” reports at License (material code) level.

6. Click on ☐ to view all the fields.

7. Select the fields required in the report.
8. Click on [OK].

9. If desired, select the [EMAIL] button to send the report.

10. If desired, from View Options select Formatted Report to download a PDF/Excel version of the report.

**Build a Report From the Network Home Page**

From A1S SMT you can generate a report of one or more Network Node records. Additionally, you can send the reports via email or download to PDF or MS Excel.

1. From A1S SMT, locate a record using the Search or Advanced Search functionality.

2. Select the checkbox to the left of the records to include.
3. If desired, select specific records (FLs) to be included in the report.

4. Click on [GENERATE REPORT].

5. On the Application Report form, select a report type from View Options drop-down list.

   **Note:** “Summary” reports at the Application level and “Details” reports at License (material code) level.

6. Click on to view all the fields.

7. Select the fields required in the report.
8. Click on [OK].

9. If desired, select the [EMAIL] button to send the report.

10. If desired, from View Options select **Formatted Report** to download a PDF/Excel version of the report.

**Download a License File**

A1S SMT allows users with read/write access to download License files.

1. Click on the License icon on the left menu.
2. Perform a simple Search or Advanced Search on the Software Management Tool – License form to locate the record, then click on [SEARCH].

The results display.
3. Click the Key icon to download the License file or select the checkbox to select one or more License records.

Click on [DOWNLOAD LICENSE] to download the License file.
Appendix

Glossary of Terms

**Avaya One Source Software Management Tool** – Delivers an online web enabled license management wrapper for Avaya Software Licenses and Maintenance Support Entitlements reporting portal. In the future, the SMT will also include software administration.

**Avaya One Source Software Management Tool Network** – An interrelated group or association of end customer Sold To’s also known as Functional Locations and/or (hNortel) Site IDs and reflects a given Company’s License and Support Entitlement landscape. This is represented at a Global, Regional, Country, Local and/or platform/application view. This is referred to as a SMT “Network.” Network in this context has no relationship to data Networking Networks.

**Group Authorization Identifier (GAI)** – Each Business Partner is assigned a unique GAI number in RFA. This number is included on the system record of each license. A Business Partner must have their GAI on the system record in order to access it. A GAI for Tier 2 Business Partners is available from their Tier 1 Business Partner. During the creation of system records Tier 1 business partners must include the Tier 2 Business Partner’s GAI. Business partners requiring access to a system record that does not contain the GAI can complete a form called RFA Transfer System Record Ownership, located on the RFA Page: [http://rfa.avaya.com](http://rfa.avaya.com), in the Helpful Information section.

**Helpful Information**

*Please click here* for RFA Job Aids, Process Flows, FAQs, Help Desk Information, Service Alerts, Forms and procedures, RFA Job Functions and other related RFA documentation.

The RFA application will only work with Microsoft Internet Explorer 5.5 SP2 and above.