Avaya Distributed Office
Release 1.1.x
Job Aid: Creating Profiles

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Issue 2
Introduction

This Job Aid describes how to create a custom profile (based on an existing profile) and Setup Assistant and make a back-up for distribution on USB flash drive or on an FTP server.

Tip:
It is recommended to complete the following Avaya University Courses before creating Custom Profiles:

- AVA00949WEN – Distributed Office Overview
- AVA00952WEN – Basic Install/Implementation of Distributed Office
- AVA00953WEN – Advanced Install/Implementation of Distributed Office

Refer to the following documents for further information while creating the profiles:

<table>
<thead>
<tr>
<th>For information on</th>
<th>Refer to…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuring Avaya Distributed Office</td>
<td>● Distributed Office Local Manager on-line help</td>
</tr>
<tr>
<td></td>
<td>● Distributed Office Central Manager on-line help</td>
</tr>
<tr>
<td>Troubleshooting and maintenance for Avaya Distributed Office</td>
<td>Troubleshooting Guide for Avaya Distributed Office, 03-602029</td>
</tr>
<tr>
<td>Designing and deploying Distributed Office solutions.</td>
<td>Design and Implementation Guide for Avaya Distributed Office, 03-602023</td>
</tr>
</tbody>
</table>

What is a profile?

A profile is a set of files containing provisioning data for a Distributed Office solution. The provisioning data can include configurations and parameters such as:

- User configurations
- Voicemail
- Translations
- Phone files
- Settings files
- Device-specific localization information, for example, IP addresses for the AM110 and the i40 or i120.
Profile sections

Each profile contains the following three elements:

- **Static Parameters** - Pre-defined image and configuration attributes of the profile that the installer cannot change. Changing the static section requires creating a new profile with the option to use an existing standard profile as the starting point.

- **Dynamic Section** - the profile section that a provisioning specialist can administer using an assistant.

- **Supplement Section** - additional files in the profile required to fully describe the user setup, such as announcements, auto attendant, phone images, phone setup. You need to copy some of these files to the USB flash drive or FTP site separately.

Customizing a profile

You can customize any or all of the following:

- The default profile.
- Standard profiles available through Distributed Office Profile Manager.
- The Initial Setup Assistant, which guides the installer through the on-site configuration process.

Designing the profile

**Note:**

You should note all changes you make to the profile and Assistant so you can verify that they match the requirements.

Before you create a custom profile:

- Choose the profile you wish to customize - this choice depends on the construct the customer will install and their specific requirements which you should consult while customizing the profile.

- Ensure that the firmware for the i40 or i120 is compatible with that of the AM110. Refer to the table on the Avaya Support site at support.avaya.com or an authorized source. Install the appropriate updated firmware or Service Packs before creating the profile as profiles are release-dependent.

- It is recommended to update any profiles you have created when a new release or Service Pack is issued.
Customizing a profile

- Ensure you are using a default or standard profile from a known source.
  - Default and Standard profiles contain information, such as regional supported allowed/denied lists, that can save time and will ensure consistency.

- It is recommended to start from clean version of the profile you wish to customize to ensure no unwanted data such as voice mail is included in the custom profile. Follow the procedure below to start from a clean profile:
  1. Open Distributed Office Local Manager.
  2. Click Restore Factory Defaults (under Maintenance & Monitoring > Configuration Administration) in the Managed Objects list.
  3. Select the NVRAM Initialize radio button.
  4. Enter "password" in the password field.
  5. Click Go.
  6. Click Yes on the pop-up window.
  7. Wait five minutes for the NVRAM init procedure to finish.
  8. Perform a system restore from a USB flash drive or FTP site, ensuring you select the correct profile. Refer to the Distributed Office Local Manager help for information.

- Copy the latest phone firmware files to the Distributed Office system. Refer to the Distributed Office Local Manager help for information.

- Decide what parameters you need to include in the profile and whether you need to include associated files like Service Packs, Distributed Office firmware and telephone firmware. You will need to determine which parameters are static and which are dynamic before using the Assistant Modeler.

- Limit the number of Assistant steps in a customized Setup Assistant in order to fulfil the "20 minutes or less" installation requirement. Bear in mind that each item in a list, such as user configuration, is an individual step in the Setup Assistant. A technician can configure users, trunks and so on, on-site or use Distributed Office Central Manager to push configurations.

- If the installation will include Distributed Office Central Manager, you can push configurations to Distributed Office rather than including individual steps in the profile.

Preparing Distributed Office for the Custom Profile

- It is strongly recommended to use a Distributed Office system configured specifically for a customer environment to customize profiles based on their requirements.
Customizing the Profile

Reconfigure the parameters and load any files you wish to add to the profile. Refer to the Distributed Office Local Manager help for further information.

**Note:**

Click **Save Configuration** to ensure your changes are stored.

If you do not want to create a custom Setup Assistant, back up the profile. Refer to [Saving the profile](#) on page 17.
Setup Assistant Modeler

Note:
It is recommended to configure the parameters, including those you want the installer to change, in the custom profile before using the Setup Assistant Modeler.

The Setup Assistant Modeler allows you to design the Setup Assistant that runs when a user configures the Distributed Office system for the first time. The Assistant presents an installer with a set of dynamic Distributed Office Local Manager pages that need to be reviewed and completed in order to configure an Avaya Distributed Office system. You select which parameters the installer can edit and which are read-only for each Assistant page. You can model one Setup Assistant for each Profile you create.

There are two types of pages in Distributed Office Local Manager: single pages and tabbed pages. You can select which sub-pages in a tabbed set are accessible.

Once you have modeled the Setup Assistant, you can save it with the associated profile for distribution on a USB flash drive or via ftp.

1. To model or create a new Setup Assistant, click on the Create Installation Profile link under Configuration Administration in the managed objects tree. The Profile Creation - New Profile page opens.

Figure 1: Profile Creation page - New Profile
2. Click **Start Setup Assistant Modeler**.
   - The Assistant Modeler home page opens.

**Figure 2: Assistant Modeler home page (existing Assistant)**

**Figure 3: Assistant Modeler home page (new Assistant)**
3. If you are modeling an existing Assistant, Click **Start Modeling**.
4. If you are modeling a new Assistant, click an object in the Managed Objects list.
5. The Assistant Modeler page opens.

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**Figure 4: Assistant Modeler page**

 ![Assistant Modeler page](image)

**Figure notes:**
1. Enable all elements
2. Disable all elements
3. Modeling on/off
4. Delete Assistant
5. Save model
6. Apply changes
7. Tabs (as in Distributed Office Local Manager)
8. Managed Objects list
9. Assistant Steps
**Figure 5: Assistant Steps**

![Assistant Steps](image)

**Figure notes:**
1. Delete step.
2. Move step up

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**Table 1: Actions on the Assistant Modeler Home Page**

<table>
<thead>
<tr>
<th>In order to...</th>
<th>Click here...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a page to the Assistant Steps list. The page is added to the end of the list.</td>
<td><img src="image" alt="The Managed Object in the Managed Objects list." /></td>
</tr>
<tr>
<td>Allow the user to configure parameters on the page (dynamic)</td>
<td><img src="image" alt="Enable All" /></td>
</tr>
<tr>
<td>Prevent the user from configuring all parameters on the page (static).</td>
<td><img src="image" alt="Disable All" /></td>
</tr>
<tr>
<td>Exit selective modeling mode.</td>
<td><img src="image" alt="Modeling ON" /></td>
</tr>
<tr>
<td>Enable or disable access to parameters on the current Assistant page.</td>
<td><img src="image" alt="Modeling OFF" /></td>
</tr>
<tr>
<td>Delete an Assistant.</td>
<td><img src="image" alt="Delete Assistant" /></td>
</tr>
<tr>
<td>Save the current page in the Assistant. Apply the changes you made to the current page.</td>
<td><img src="image" alt="Apply Changes" /></td>
</tr>
</tbody>
</table>

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Adding a page to the Assistant Step List

To add a page to the Assistant Step List, select it in the Managed Objects list. The page will open in the modeler and be placed at the end of the Task List.

Click **Apply Changes** to save the current page in the Assistant.

Editing the page

You can configure each page to one of 3 levels of user access, according to which parameters the user needs to configure.

- Enable all (default): users can configure any parameter on the screen.
- Disable all: users can view parameters, but not change them. You can use this to display information that users may need.
- Modeling ON/OFF: users can only access parameters to which you permit access.

If you add a tabbed page, such as that for Network Configuration, you can enable or disable individual tabs. Disabled tabs do not appear in the Assistant.

Lists of objects, such as those in the Users Page, cannot be part of the Assistant. You need to create a step for each item in the list.

**Note:**
You must click the **Apply changes** button to save the changes to the step. Steps that you have not saved are indicated by a *** in the Assistant Step list.
Creating a step for a list item

In order to create a step for a list item:

1. Open the page by selecting it in the Managed Objects list.
2. Click on the list item.

Figure notes:
1. Click here to add Extension 200 to the Assistant Steps list.
   - The item is automatically added to the end of the Assistant Steps list.
2. Click **Apply Changes** to save the page in the Assistant.
4. Repeat steps 2 and 3 for each item you wish to add.

Figure notes:
1. User 200 added to Assistant Steps list.

**Note:**
Each list item you add to the Assistant Steps list will increase the time required to run the Assistant. This may lead to an installation time of more than 20 minutes.

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**Enabling and disabling tabbed pages**

You can show or hide tabbed pages, such as those for network configuration, individually in the Assistant.

- To show a tab in the Assistant, check the box on the tab .
- To hide a tab in the Assistant, uncheck the box on the tab .

**Tip:**
The Enable All or Disable All button enables or disables access to the elements on the tabs. The tab status remains unchanged.
Figure 6: Enabled tab

Figure 7: Disabled tab
Modeling (setting parameters as static or dynamic)

In order to allow or prevent installer access specific elements while running the Setup Assistant, ensure Modeling is on.

To enable Modeling if it is off:

- Click on **Modeling OFF**.
  - The Modeling status changes to ON.
  - The cursor changes to a crosshair.
  - The Apply Changes, Enable All, Disable All, Delete Assistant and Save & Exit options are greyed out.

Figure 8 shows a page with Modeling on.

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**Figure 8: Modeling ON**

*Figure notes:*
1. Crosshair cursor
2. Enabled element
3. Disabled element

To enable or disable an element, click on it.

- Enabled elements are on a white background.
- Disabled elements are greyed out.
Note:
Password fields have a third state, "clear content," represented by a green color. In this state, a user is required to enter a password in the field while running the Assistant.

Click Apply Changes to save the changes you made.

Saving the Assistant and exiting the Modeler

To save the Assistant, exit the Modeler and return to the Create Installation Profile page:

1. Click **Save and Exit**.
   - The following dialog box is displayed

2. Click **OK** to save the profile or **Cancel** to return to the Modeler.
3. Close the Modeler page.
   - You return to the Create Installation Profile page. See Figure 9.
4. Go to step 3 in Saving the profile on page 17 for instructions on saving the profile and Assistant.
Saving the profile

**Note:**
The profile size can be up to 250 Mb, according to the amount of configuration information and whether a Service Pack is in use.

1. To save the profile, click **Create Installation Profile** located in the managed objects tree. The Profile Creation - New Profile page opens.

**Figure 9: Create Installation Profile page**

![Create Installation Profile page](image)

**Figure notes:**
1. Next button
2. Profile name
3. Description
4. Save Configuration.

2. Click **Save Configuration**.
3. Enter the Profile name.
4. Enter a description (optional).
5. Click **Next**.
   - The Set Profile Backup Type page opens

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6. Check the **Backup** radio button.

7. Check the appropriate method:
   b. **FTP** - for backup to an FTP server.

8. Enter the following information for the FTP server:
   - Remote filename with the full path.

   **Note:**
   The remote filename is a directory which must be empty. If you wish to reuse an existing profile directory, you must delete its contents before executing the backup.
   - The FTP server account user name
   - The FTP server account password
   - The IP address of the FTP server

9. Click **Next**.
   - The Profile Creation - Operation Type page appears.
10. Check the **Complete Backup** radio button.

11. If you chose the FTP method in step 7, go to step 14.

12. Click **Next**.
   - The Profile Creation - Backup to USB Flash Drive page opens:
13. Enter the backup name in the **Backup name** field.

   **Note:** If the name already exists, you will be asked to confirm that you wish to over-write the existing profile.

14. Click **Next**.

15. The Backup and Restore Status page appears, according to the method you chose in step 7.
   - If you chose USB, refer to **Figure 13**.
   - If you chose FTP, refer to **Figure 14**.
16. Click **Start**.

   - The status of the backup is shown on the Backup and Restore Status page that opens.
Once the backup has finished successfully, the Operation Status field shows OK and the Error Description field shows No Error.

Testing the profile

Test the profile and Setup Assistant as follows:

1. Perform an NVRAM Init.
2. Restore the custom profile (from USB flash drive or FTP)
3. Verify that the firmware installed on Distributed Office, Media Modules and Telephones match those in the reference list you prepared while customizing the profile.
4. Verify phones can be upgraded automatically to the profile firmware.
5. Verify that the Distributed Office enters Assistant mode when it restarts.
6. Review the Assistant pages and verify they match the requirements you defined.
7. Change selected fields in the Assistant and reboot the system.
8. Reset the Distributed Office and verify that the Distributed Office Local Manager home page opens.
9. Review the Assistant pages you changed in step 7 and check that the values, whether modified or default, are correct in regular Distributed Office Local Manager.
10. Verify that all non-Assistant elements match the design static parameters.

11. Review relevant maintenance (status) pages and verify display matches hardware and profile definition.

12. Verify that there are no error alarms.

13. Make phones calls for all the types of phones that are defined in the profile.

14. Test call features such as conference, transfer and hold.

15. Activate key systems features, such as specific line pickup/originate, where applicable

16. Test inter-branch and intra-branch voice mail and AutoAttendant:
   - Leave message to users with mailbox
   - Retrieve message from mailbox
   - Call to AutoAttendant extension and check the tree traversal behavior

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**Backing-up additional support files**

Distributed Office and media module firmware files are not included in the profile backup. This section provides guidelines on where to copy the firmware files to a USB flash drive or FTP site.

1. Back-up the custom profile according to the instructions in Saving the profile on page 17.

2. Copy the Media Gateway binary for the construct you are using to the root level directory. For example, if you named your profile directory 1120-A, you would place the i120 binary in 1120-A/.

3. Copy all the Media Module firmware files to the MM directory under the root level. Following the example in step 2, the directory would be 1120-A/MM/.

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**Downloading and Expanding Distributed Office Profiles**

**Overview**

A default configuration profile is associated with each Avaya Distributed Office hardware construct. Each default profile consists of several files contained in a standard directory structure. (See **Figure 15**). The folder that contains the files and the directory structure for each profile is compressed into a single *tar.gz file. These compressed files can be downloaded from the Avaya Support web site as described in Downloading the default profiles.
To use a default profile, you must expand the *.tar.gz file using a utility that does not ignore the empty directories that are part of the profile directory structure. For this reason, you cannot use the Windows WinZip utility. You can download a set of compression and expansion utilities as described in Downloading the compression utilities.

To expand a profile *.tar.gz file, see Expanding a compressed profile folder.

If you need to back up a profile, you should first compress the profile folder to a *.tar.gz file as described in Compressing a profile folder.

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**Downloading the default profiles**

The Avaya Distributed Office default profiles are available for download on the Avaya Support web site at Distributed Office Default Profiles.

Tip: The compressed files for the default profiles are 200 MB or larger so be prepared for a corresponding download time depending on your link speed.

To download a default profile:

1. Connect to the Internet and go to Distributed Office Default Profile.
2. Scroll down to the table of Constructs and scroll to the construct that you are using.
3. In the first column, click on the filename for the default profile associated with that construct.
4. Log in with your Avaya SSO login ID and password.
5. In the "File Download" dialog box, select *Save*.
6. In the "Save As" dialog box, browse to the folder on your computer in which you want to save the profile and click *Save*.

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**Downloading the compression utilities**

The profile files cannot be properly compressed (zipped) and expanded (unzipped) with the Windows WinZip utility. There are many available tools that compress and expand the files properly. Avaya recommends using the Gnu Unix utilities, *gunzip.exe* and *tar.exe* to expand the profile *.tar.gz* files and *gzip.exe* and *tar.exe* to compress the profiles. These tools can be downloaded from: sourceforge.net.

⚠️ **Important:**

To use the *gunzip.exe*, *gzip.exe*, and *tar.exe* utilities on your computer, they must reside in the *system32* directory.
To download the utilities:

1. Connect to the Internet and go to sourceforge.net.
2. Click **Download UnxUtils**
3. Click **unxutils**
4. Click **UnxUtils.zip**

**Note:**
There are over 100 utilities (*.exe files) in the UnxUtils.zip file. You can choose to save the zip file to your hard drive and extract all or some of the files, or you can extract and save the three files you need during the download process as described in this procedure.

5. In the "Opening UnxUtils.zip" dialog box, select **Open with WinZip** and click **OK**.
6. In the "Winzip" window, open the **usr**, **local**, and **wbin** folders.
7. In the list of *.exe files, scroll down and select the three utilities (using the Ctrl key for multiple selection):
   - gunzip.exe
   - gzip.exe
   - tar.exe.
8. Click the **Extract** icon at the top of the window.
9. In the "Extract" dialog box, under My Computer, open the (C:) Local Disk and **WINDOWS** directories and select the **system32** directory.
10. Click the **Extract** button.
    The three utility files are copied to the system32 directory.

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**Expanding a compressed profile folder**

Use the **gunzip.exe** and **tar.exe** utilities to expand a profile *.tar.gz file. Ensure that these utility files are in the C:\WINDOWS\system32 directory.

To expand a profile *.tar.gz file:

1. In a command (CMD) window on your computer, change the current directory to the directory containing the profile *.tar.gz file.
2. Enter **gunzip <profile_filename>.tar.gz**.
   This creates **<profile_filename>.tar**.
3. Enter **tar -xvf <profile_filename>.tar**.
   This creates the expanded profile folder and subfolders to be installed on an Avaya Distributed Office system.
To install the expanded profile folder on a Distributed Office system, copy the folder structure to a USB memory device and connect the memory device to the system. Log on to the Local Manager interface and run Restore Factory Defaults. The system will reboot and load the profile.

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**Compressing a profile folder**

Use the `gzip.exe` and `tar.exe` utilities to compress an expanded profile folder to a *.tar.gz file. Ensure that these utility files are in the C:\WINDOWS\system32 directory.

To compress an expanded profile folder:

1. In a command (CMD) window on your computer, change the current directory to the directory containing the profile folder.
2. Enter `tar cvf <profile_filename>.tar <profile_folder_name>`.
   
   This creates `<profile_filename>.tar`.
3. To view the contents of the tar file, enter `tar tvf <profile_filename>.tar`.
4. Enter `gzip <profile_filename>.tar`.
   
   This creates `<profile_filename>.tar.gz`.
Profile directory structure

Figure 15 shows an example of a profile folder and the subdirectory structure. This is the profile folder for the i120-A2h default profile.

Figure 15: Typical profile directory structure