



Avaya one-X® Portal Site Survey/Pre-Installation Checklist

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Pre-Installation Checklist

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Review this and the tasks prior to the Avaya one-X® Portal Server installation date.

[0] Company Contact Information		
0.1	Company Name: Address: Sold to #:	
0.2	Main Contact / Project Manager: Email: Office Phone: Cell Phone:	
0.3	Technical Contact: Email: Office Phone: Cell Phone:	

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[1] Customer Tasks Basic INFO		Task Status / Notes
1.0	<p>What version and release of Avaya Communication Manager do you wish to deploy with Avaya one-X Portal?</p> <p>Latest version: 5.2, release 5.2.0.0.47 Minimum supported version 5.2</p>	Pick One
1.1	<p>What is the total number of users on your Avaya Communication Manager?</p>	
1.2	<p>Are there multiple Avaya Communication Managers Networked?</p> <p>DCS +, QSIG</p> <p>What is Local and remote Ext. ranges...</p> <p>Identify each System and list the number of users separately.</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Pick One</p>
1.3	<p>What hardware is hosting the Avaya Communication Manager where Avaya one-X Portal is deployed?</p> <p>For example, Avaya S8800 1U server</p>	Pick One
1.4	<p>How many users will use Avaya one-X Portal?</p>	
1.5	<p>Are the Avaya one-X Portal users configured for EC500 in Avaya Communication Manager?</p>	Yes <input type="checkbox"/> NO <input type="checkbox"/>
1.6	<p>Do you have additional PBX's that are non Avaya Communication Managers networked?</p> <p>If yes, provide the following information: Type of PBX (e.g. Nortel etc.)</p> <p>How is the Avaya Communication Manager involved in the routing of calls to/from the other PBXs, if at all?</p>	Yes <input type="checkbox"/> NO <input type="checkbox"/>

1.7	Does your Avaya Communication Manager have a DTMF software patch installed? (Dual Tone Multi Frequency functionality for interactive CTI operations)	*Installed on License File*
1.8	How many digits are used in your internal dial plan for the one-X Portal users?	Pick One
1.9	How is the outside line reached (For example, dial 9, *9)?	Pick One
1.10	If a "1" is not required for 10-digit dialing of local numbers, provide a list of the NPA-NXXs for those numbers.	
1.11	Do all users use the same dial plan(s) for outside lines? If not, explain how they differ	Pick One
1.12	How many digits are passed on the T1 circuit connected with your switch?	Pick One
1.13	Do you use long distance authorization codes supplied by a carrier or external party? Does each user have a unique PIN? Does the user enter the PIN before or after the number is dialed?	"Not Supported"
1.14	Are forced authorization codes (FAC) and/or client matter codes (CMC) used on Avaya Communication Manager where Avaya one-X Portal is deployed? For example, a FAC might be used to enable and disable a feature like call waiting; a CMC might be used to log minutes spent with a particular customer.	"Not Supported"
1.15	Provide information about the source, management, and use of any FACs and CMCs your system uses. For example: "Switch technician will configure call waiting on the Avaya CM. End users will dial *16 on their desk phone to enable call waiting and dial #16 to disable."	
1.16	Is Active Directory your Enterprise Directory Source? If not, what directory is used?	

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1.17	<p>What version of Microsoft Active Directory do you use?</p> <p>If you use LDAP application other than Microsoft Active Directory, custom engineering may be required.</p>	2003
1.18	<p>Is the Directory Authentication Source different from the Directory Look-up Source? If Different what is it?</p>	Yes <input type="checkbox"/> NO <input type="checkbox"/>
1.19	<p>Are there any other CTI applications that use JTAPI running on the Avaya Communication Manager?</p> <p>For example, call center applications used for individual agent monitoring.</p>	Yes <input type="checkbox"/> NO <input type="checkbox"/>
1.20	<p>If yes, are the same users that use Avaya one-X Portal using these CTI applications?</p>	Yes <input type="checkbox"/> NO <input type="checkbox"/>
1.21	<p>Is the Avaya Communication Manager being used in a call center environment?</p>	Yes <input type="checkbox"/> NO <input type="checkbox"/>
1.22	<p>Is EC500 licensed and installed on the extensions on which Avaya one-X Portal will be working?</p>	Yes <input type="checkbox"/>
1.23	<p>What voicemail platform is used?</p> <p>What software version is used?</p> <p>What message store is used?</p>	<p>Must be Modular Messaging 3.0, 4.0, or 5.2</p> <p>Pick One</p> <p>Pick One</p> <p>Pick One</p>
1.24	<p>How many message store servers are in your network?</p>	Pick One
1.25	<p>Are all your users that will be using Avaya one-X Portal contained within the same message store database?</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>

[2] Customer Tasks Basic Setup		Task Status / Notes
2.1	Provide administrative user name and password for: <ul style="list-style-type: none"> ● Avaya Communication Manager super User ● Modular Messaging Trusted Server ● one-X Portal ● Presence ● Application Enablement Services (AES) ● Directory Service 	<p style="text-align: right;"><u>Username</u> <u>Passwords</u></p> CM: one-X Portal: Intelligent Presence Service: Application Enablement Services (AES) Directory Service
2.2	Provide: <ul style="list-style-type: none"> ● DNS IP address, ● AES IP address, ● Dedicated CLAN for AES IP address, ● S87XX Active or Proc IP, ● CLAN IP address used for SAT (IP-Services) Ping connection from Avaya one-X Portal internal server to AES, PBX switch and MSS servers. If using DMZ ping from External to Internal. SSH port 5022 & Telnet 5023 must be Enabled for Both Service State and Corp. LAN.	OneX Internal Edge IP : OneX External Edge IP (if used): OneX Public Mapping: URL for Public mapping: DNS IP Primary: DNS IP Secondary: DNS IP Tertiary: AES IP: S87XX Active or Proc IP: MSS IP: Internal: Default GTWY: Subnet: DMZ: Default GTWY: Subnet:

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<p>2.3</p>	<p>Provide the following switch Feature Access Codes for input to Avaya one-X Portal Admin Configuration:</p> <ul style="list-style-type: none"> ● SAC Enable Code ● SAC Disable Code ● All users should have EC500 Appearance removed from their desk phone. Avaya one-X Portal manages this through the application. 	
<p>2.4</p>	<ul style="list-style-type: none"> ● Request EC500 set up. ● Provide user mobile number for the EC500. <p>Note: Mapping mode = termination for EC500.</p>	<p><u>Provide a spread sheet that contains:</u></p> <p>First Name and Last Name DID that is in Active Directory under the telephone Number field. Extension in CM Cell #</p>
<p>2.5</p>	<p>Provide the following information: LDAP User DN = (where login resides) Switch User Base DN = (where users) For example:</p> <p>For Admin: cn=onexpAdmin,ou=Groups,dc=Company,dc=com</p> <p>For Audit: cn=onexpAudit,ou=Groups,dc=Company,dc=com</p> <p>For User: cn=onexpUser,ou=Groups,dc=Company,dc=com</p> <p>For Presence: cn=onexpPresence,ou=Groups,dc=Compa</p>	<p>LDAP Admin Group DN: LDAP Audit Group DN: LDAP User DN: User Presence User Group DN:</p>

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	Note: Person that wants to receive alerts	
2.9	Provide all user names and their extensions.	<p><u>Provide a spread sheet that contains:</u> First Name & Last Name DID that is in Active Directory under the telephoneNumber field. Extension in CM Cell #</p>
2.10	Schedule users for a 30- to 60-minute training session on the morning following Avaya one-X Portal Server installation (provided by Customer).	<input type="checkbox"/> Date:
2.11	Create an H.323 Gateway list for the switch.	
2.12	Create DMCC and TSAPI login IDs for one-X Portal.	DMCC ID TSAPI
2.13	Configure Send All Calls in Communication Manager to enable Do Not Disturb for one-X Portal.	
2.14	Configure and enable the following protocols: <ul style="list-style-type: none"> • IMAP4 • SMTP • LDAP 	
2.15	Authorize LDAP access.	

2.16	<p>Presence Services: Configure one-X Portal security certificates.</p> <ul style="list-style-type: none"> • one-X Portal certificate • AcpUMSBus to be "non-secure" 	
2.17	Configure AcpUMSBus to be "nonsecure"	
2.18	Configure Presence server	
2.19	Configure SIP Presence server	
[3] Avaya Tasks Communication Manager & AES Licensing		Task Status / Notes
3.0	<p>Identify server racks for the Avaya one-X Portal Server.</p> <ul style="list-style-type: none"> • Power • Ethernet <p>Note: If the one-X Portal system includes a dedicated AE Services server, install and configure AE Services.</p> <p>Note: The Avaya one-X Portal Server requires the AES Server.</p> <p>Note: Make sure that you have installed all required licenses for the Application Enablement Services.</p>	<p>Rack Location:</p> <p>Power: <input type="checkbox"/></p> <p>LAN: <input type="checkbox"/></p>
3.1	<p>Install Microsoft Windows Server 2003 (Standard or Enterprise edition) with Service Pack 2 or higher on the Avaya one-X Portal Server and add Windows components of ASP.NET and IIS.</p> <p>Note: If the customer purchases the Avaya hardware/software from Avaya, it comes</p>	<p>Windows version installed If Customer supplied Server:</p> <p>Service Pack:</p> <p>ASP.NET installed? <input type="checkbox"/></p>

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	<p>with Windows Server 2003 Standard Edition. If the customer purchases their own hardware, they can select Standard or Enterprise.</p> <ul style="list-style-type: none"> ● Harden servers per corporate security standards. ● Apply SSL certificate on outside server as required by corporate security standards. <p>Make sure the free space on the target drive is at least 6 GB and is not an even multiple of 4 GB. (This is a Microsoft Installer requirement.)</p> <p>Note: Install Linux with the required components on the one-X Portal server.</p>	<p>IIS installed? <input type="checkbox"/></p> <p>SSL certificate installed? <input type="checkbox"/></p>
<p>3.2</p>	<p>Avaya one-X Portal requires additional licensing for Avaya Communication Manager. This licensing is included in a material code when the product is ordered. Prior to configuring Avaya one-X Portal, perform the following steps:</p> <p>Validate the following licenses exist:</p> <ul style="list-style-type: none"> ● VALUE_SIP_TRK (Maximum Administered SIP Trunks) ● VALUE_PORT (Platform Maximum Ports) ● FEAT_EC500 (Enhanced EC500 = yes) ● VALUE_OPT_EC500 (Maximum Off-PBX Telephones = EC500) ● VALUE_OPT_PBFMC (Maximum Off-PBX Telephones = PBFMC) 	<p>Received Communication Manager licensing from Avaya?</p> <p>Is DTMF patch included? <input type="checkbox"/></p> <p>Filename:</p> <p>Filename:</p>

To create a domain user:

1. In the **Active Directory Users and Computer**, create a domain user account in the domain where your Microsoft Exchange server resides.

NOTE:

If you have multiple Microsoft Exchange Servers, perform the following tasks on each Microsoft Exchange Server used by the Avaya one-X Portal Application Suite.

2. In the Microsoft Exchange System Manager, assign the permissions to Domain User as follows:
 - a. Navigate to the **Mailbox Store** of the Microsoft Exchange Server.
 - b. Right click **Mailbox Store** and select **Properties**.
 - c. Select the **Security** tab.
 - d. Click the **Add** button and add the Domain User.
 - e. Assign the following permissions to the Domain User:
 - Read
 - Execute
 - Delete
 - Read permission
 - Change permission
 - List contents
 - Read properties
 - Write properties
 - List object
 - Open mail send queue
 - Receive As
 - Send As
3. Once these permissions have been applied to the Domain User, stop and restart the Microsoft Exchange System Attendant Service, Microsoft Exchange MTA Stacks Service, and Microsoft Exchange Information Store Service. Optionally, you can wait for the update period to pass (usually around 24 hours) when the permissions assigned to the Domain User read into the Microsoft Exchange Applications.

System Acceptance/Signoff

Task	System Acceptance/Signoff	Task Completed By:	Date:
1	<p>Validate that the test lines are functional and perform Avaya one-X Portal basic set of tests including the following:</p> <ul style="list-style-type: none"> ● Redirect calls to voicemail. <input type="checkbox"/> ● Redirect calls to mobile device. <input type="checkbox"/> ● Simulring. <input type="checkbox"/> ● Redirect incoming call to office phone. <input type="checkbox"/> ● Make a call back. <input type="checkbox"/> <p>Perform the following tests for the Avaya one-X Portal Web application and mobile devices:</p> <ul style="list-style-type: none"> ● Validate call logs show incoming calls. <input type="checkbox"/> ● Validate call logs show outbound calls. <input type="checkbox"/> ● Perform a corporate directory lookup. <input type="checkbox"/> ● Initiate a call back via corporate directory lookup. <input type="checkbox"/> ● Initiate a call back via personal directory lookup. <input type="checkbox"/> ● Leave a voicemail for the test user. <input type="checkbox"/> ● Check that the message shows up in the applications. <input type="checkbox"/> ● Play the message from the applications. <input type="checkbox"/> ● Save the test message. <input type="checkbox"/> ● Delete the test message. <input type="checkbox"/> 		
Set up for Avaya one-X Portal Users			
2	<p>Have users download the Avaya one-X Portal application and assist if necessary. <input type="checkbox"/></p>		
3	<p>Train users on the Avaya one-X Portal Web application. <input type="checkbox"/></p>		
4	<p>Train users on the Avaya one-X Portal application. <input type="checkbox"/></p>		
5	<p>Verify message delivery, playback, and call redirection with a few users. <input type="checkbox"/></p>		

Access to Avaya one-X Portal Server after Installation

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Document how Avaya Support will access the Avaya one-X Portal Server after initial implementation is completed.

Customer Installation Acceptance

7

Customer acknowledges Avaya one-X Portal Service has been established and all users have been configured to their satisfaction. List any outstanding issues that may need to be addressed.

NOTE: Provide customer with Avaya Support contact telephone number 1-800-242-2121.

Customer Signature & Date:

_____ Date: