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GLOBAL REGISTRATION TOOL (GRT) JOB AID

Purpose	The purpose of this document is to explain the Global Registration Tool (GRT) and how Avaya Business Partners, customers and associates can use it to keep End Customer install base records accurate.
Scope	Theater: Global GRT and this document should be used any time there is a change (addition, removal, move, upgrade, etc.) in a customer's hardware equipment, or to enable devices for remote connectivity and alarming
Target Audience	Avaya associates, Business Partners and End Customers who perform equipment registrations in GRT
See Also	**Global Registration Support Site:** *support.avaya.com/registration* **Technical Onboarding Job Aid:** *https://support.avaya.com/css/P8/documents/100175932* **SAL Supported Products List:** *https://support.avaya.com/css/P8/documents/100074077* ***CM Onboarding Help Document:*** https://support.avaya.com/css/P8/documents/100177032 **GRT Enhancement KB Articl**e*:* *https://support.avaya.com/ext/index?page=content&id=TRNG100448*
Tools	Global Registration Tool
Glossary of Terms	• GRT - Global Registration Tool • TOB - Technical Onboarding • SEID - Solution Element ID • SAL - Secure Access Link

CONTENTS

GLOBAL REGISTRATION TOOL AND PROCESS

Overview

The Global Registration Tool (GRT) is used to register equipment on an End Customer's install base for **purposes of renewals quoting and ongoing maintenance support.** GRT users can ensure that a customer's install base is accurate by updating or validating hardware inventory records and by testing connectivity and alarming to the necessary devices at the customer's Sold To/Functional Location.

There are many different types of registrations that a user can execute in GRT – this document, along with the others in the Helpful Links/Additional Information section, **will explain each of them**.

Policy

To ensure timely delivery of proper service entitlements, Avaya records must accurately reflect the products/materials that are installed at a customer site. In addition, regardless if procured through an Avaya Distributor or direct from Avaya, product registration requires the correct **end-customer name and installation location.**
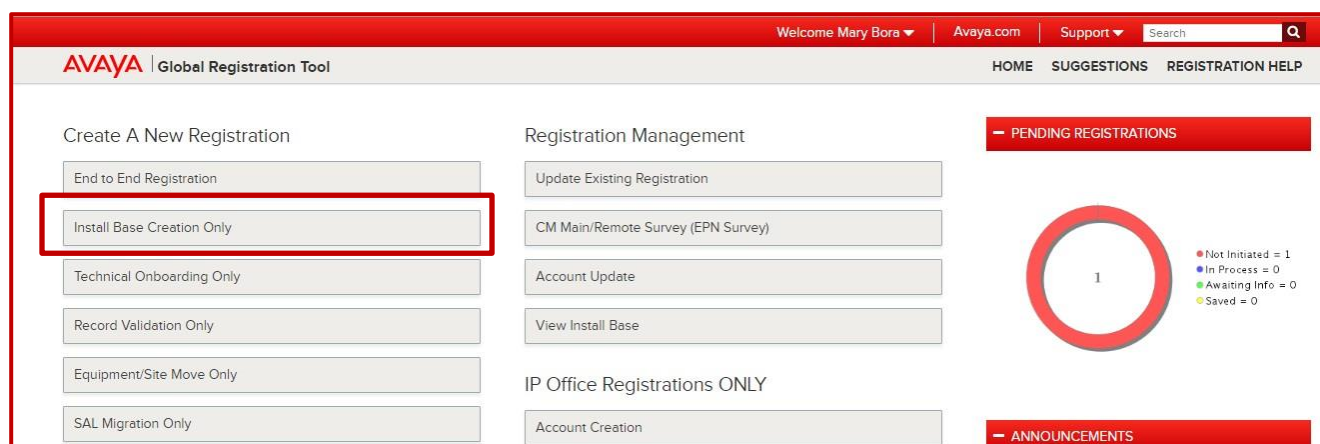
INSTALL BASE CREATION

Install Base Creation is used to add new material codes to an End Customer's install base. Users can add material codes and quantities by entering them manually on the screen, or by uploading an Excel spreadsheet with the same information.
NOTE:
- End Customers cannot ADD Install base records
- Install Base Creation is not required for *Direct* End Customers because direct customer install base records are populated automatically when an order is completed with Avaya.

Steps to perform Install Base Creation

1. Click INSTALL BASE CREATION ONLY on the GRT Home screen

2. Type in the **End Customer's Sold To/Functional Location.** Note: End Customer ST / FL must be in the 10-digit format with leading zeros.

Click SEARCH

3. Complete the details on the Site Contact Validation screen

Click NEXT

4. View the records on the install base currently by clicking the bar that says EXISTING INSTALL BASE

5. Add material codes, quantities and serial numbers using one of the following options:

   i. **Manually** by clicking MANUALLY ADD MATERIAL CODE (a new row will appear for you to input the applicable information)

      – Input the appropriate material codes, quantities and serial numbers

        NOTE: The Serial Number field will always be greyed out/disabled. If a product is serialized, but a quantity greater than 1 is entered, SAP will assign random serial numbers.

      – Click Manually Add Material Code again if additional materials need to be added

      – Once all material codes are added click SUBMIT.
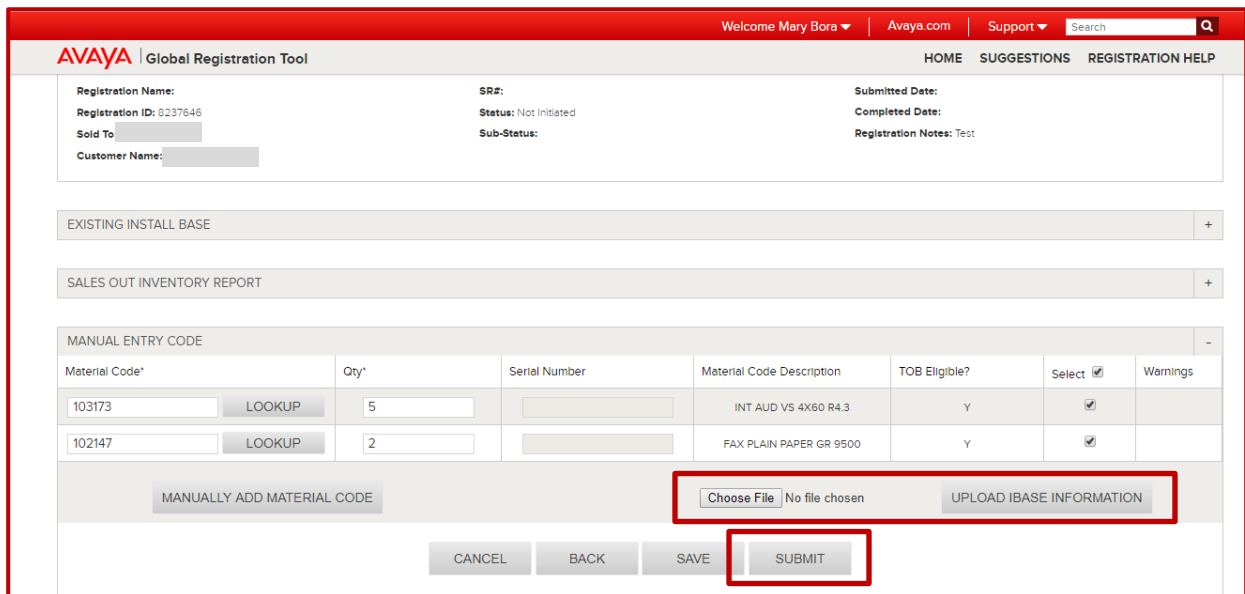
ii. **File upload** via an **Excel spreadsheet** by clicking UPLOAD IBASE INFORMATION (your internet browser will download an Excel spreadsheet template you can use)

- Update and save the Excel spreadsheet to your computer
- In GRT, click CHOOSE FILE
- Select the saved Excel spreadsheet
- Click UPLOAD IBASE INFORMATION a second time (the information updated in the Excel spreadsheet will appear on the screen)
- Click SUBMIT
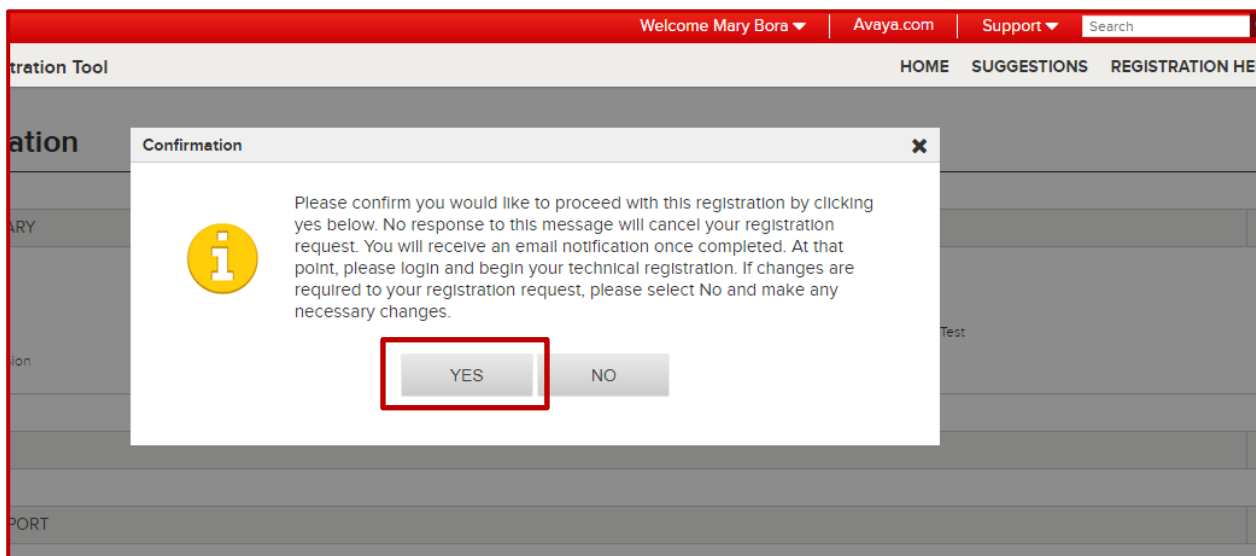
6. To proceed with the registration, click on Yes.

7. Pop message appears stating Installed Base Creation Registration request is submitted.
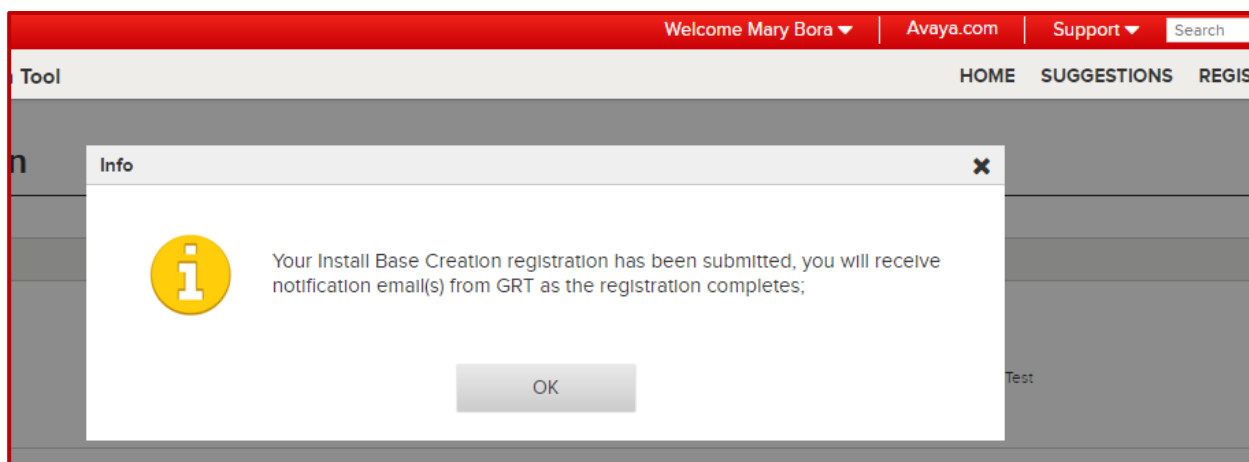
8. Email confirmation is sent to the requestor.
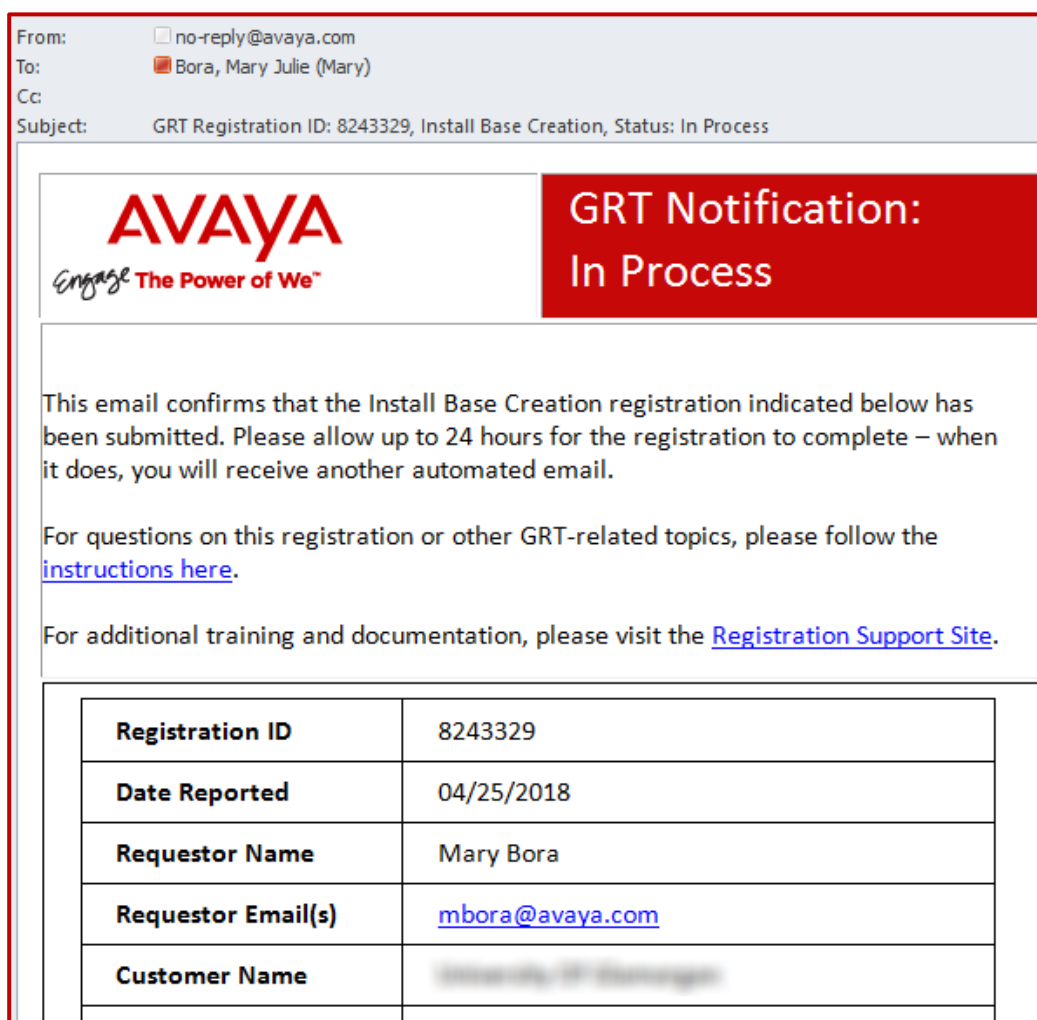
9. Once the Installed Base Creation is completed, confirmation email is sent
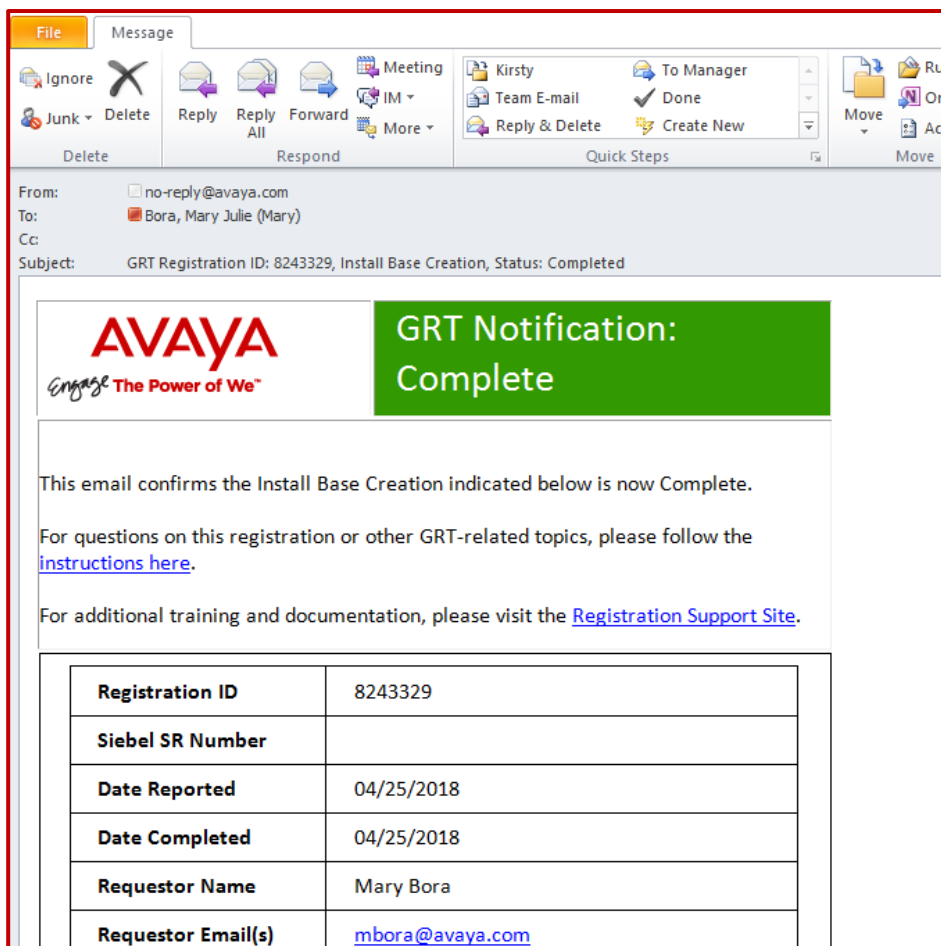
Roles and Responsibilities when performing Install Base Creation

Scenario	Scenario Description	Party/Circumstance	Responsibility
1	The customer engages APS to install Avaya product (direct order)	N/A	This step is automated
2	The customer engages a Business Partner to install Avaya product, or it is an indirect order involving a Business Partner	**Business Partner**	This step is automated
3	A Business Partner uses a third party, other than	**Business Partner**	Creates Install Base in GRT

Scenario	Scenario Description	Party/Circumstance	Responsibility
	APS, to install Avaya product		
4	The customer installs Avaya product and has engaged Avaya to certify the equipment	− The equipment was purchased **from Avaya** − The equipment was purchased **from a Business Partner**	This step is automated
5	The customer installs Avaya product and has engaged a Business Partner to certify the equipment	See Scenario 4	See Scenario 4
6	The customer has existing equipment they are looking to bring under an Avaya maintenance agreement; the customer has engaged either Avaya or a Business Partner to certify the equipment	See Scenario 4	See Scenario 4

TECHNICAL ONBOARDING

Technical Onboarding is used to **establish and test remote connectivity and alarming** to the devices on an End Customer's install base.

There are four primary methods of remote access used by Avaya, all of which are enabled through Technical Onboarding in GRT:

- **Secure Access Link (SAL)** is the most common remote access method chosen when performing Technical Onboarding

- **SSL/VPN** is the remote access method used when deploying IP Office solutions

- **Modems and IP addresses** can also be used when performing Technical Onboarding on many older products
- **RASIP** can be used for old equipment

As stated above, SAL remote access is the most common option users choose when performing this step of a registration. The Technical Onboarding process for a device using SAL remote access is actually two distinct steps in GRT: SEID Creation and Connectivity/Alarming Testing.

SEID Creation is the process of creating Solution Element ID's (SEID's) and Solution Element Codes (SE Codes) for the devices on a customer's install base that are to be remotely accessible. These SEID's and SE Codes identify the End Customer's specific equipment and are critical to providing remote support.

Connectivity/Alarming Testing is the process of testing that Avaya can remotely access, and receive proactive alarms from, devices at a customer's location. Much of this Connectivity/Alarming Testing is automated and the testing that is not automated will be done manually by an Avaya engineer when the request is submitted in GRT.

Steps to perform Technical Onboarding

This document covers the basics of Technical Onboarding. For more information, including screenshots and the steps to perform both SEID Creation and Connectivity/Alarming Testing, review the following document:

- Technical Onboarding Detailed Job Aid: *https://support.avaya.com/css/P8/documents/100175932*
  NOTE: Most of Technical Onboarding scenarios are handled in GRT. For information on the few scenarios that cannot be processed in GRT, follow the guidance in the Knowledge Base article below: *https://support.avaya.com/ext/index?page=content&id=FAQ101876*

Roles and Responsibilities when performing Technical Onboarding

Scenario	Scenario Description	Party/ Circumstance	Responsibility
1	The customer engages APS to install Avaya product	APS	1) Completes GRT request for SAL records building and receives SEID's 2) Completes programming of SAL GW and establish connectivity; complete connectivity and alarming request in GRT (and receive SR# for registration team to work)
		Avaya Registration Team (and GRT)	3) Handles any errors with records building 4) Tests alarming and connectivity with new devices and sends confirmation back to requestor allowing project to be closed
2	The customer engages a Business Partner to install Avaya product	Business Partner	Responsible for components 1 and 2 of Scenario 1; though work may be subcontracted to APS however, responsibility delegation must be clearly documented in the Statement of Work
3	A Business Partner uses a third party, other than APS, to install Avaya product	Business Partner	Responsible for components 1 and 2 of Scenario 1; though work may be subcontracted to APS however, responsibility delegation must be clearly documented in the Statement of Work
4	The customer installs Avaya product and has engaged Avaya to certify the equipment.	*NOTE: Scenario 4 is currently being reviewed by Avaya; updated instructions will be provided upon the next release of this Help Document.*	
5	The customer installs Avaya product and has engaged a Business Partner to certify the equipment	See Scenario 2	See Scenario 2

	The customer has existing equipment they are looking to bring under an Avaya maintenance agreement; the customer has engaged **either Avaya or a Business Partner** to certify the equipment	Customer has **engaged Avaya**	See Scenario 4
6		Customer has **engaged a Business Partner**	See Scenario 5

RECORD VALIDATION

Record Validation is used to modify existing records on the customer's install base. Options are:
1) **Remove** material codes and quantities (i.e. when a device is no longer being used)
2) **Increase** the quantity of existing material codes (i.e. when new/additional instances of the same equipment have been installed)
3) **Validate** that the records are accurate as-is,
4) **Update** the serial number of any record that has one.

Users can perform these actions manually on the screen or by uploading an Excel spreadsheet with the same information.

NOTE: When a device is removed from a customer's install base via a Record Validation transaction, the customer's **maintenance contract and billing will NOT be updated automatically.** GRT will create a Service Request for an Avaya associate to review the customer's account and determine if the maintenance for the records removed should be cancelled, and if necessary termination fees should be billed. Recasts and cancellations can also be submitted to *mycontract@avaya.com*.
To ensure the customer's billing is updated correctly, work with your Avaya Account Manager

Steps to perform Record Validation

- Click RECORD VALIDATION ONLY on the GRT Home screen

- Type in the End Customer's Sold To/Functional Location. Note: End Customer ST / FL must be in the 10-digit format with leading zeros

  Click SEARCH

- Complete the details on the Site Contact Validation screen

  Click NEXT

- View the records on the install base currently by clicking the bar that says RECORD VALIDATION SUMMARY

- View more details of any of the records on the RECORD VALIDATION SUMMARY page by clicking on the Quantity, Material Code or Material Code Description listed (all are hyperlinks)

- **Validate** that the install base records on the screen are accurate as-is by clicking VALIDATE at the bottom of the screen
  NOTE: The option to validate existing records is only available if no changes have been made on the screen; once a user makes changes to the information presented, the Validate button will be disabled and the Submit button must be used to submit the registration
- **Update the quantity** of any record manually by entering the correct quantity (the quantity that is physically installed at this location) in the UPDATED QTY column of that row
  NOTE: Any row which has a serial number or SEID will only have a quantity of 1 (as there should only be 1 record with this particular serial number or SEID) and these rows can only be removed

- **Remove** any record manually by entering a "0" in the UPDATED QTY column of that row

- **Update the serial number** of any record manually by locating that record and changing the serial number listed in the SERIAL NUMBER column of that row
  NOTE: Users can update any serial number on the account but they cannot delete existing serial numbers without replacing them; if a user simply removes the existing serial number without entering a new one, GRT will ignore the change once the registration is submitted

- Click SUBMIT

- Add a **new row** of information to the install base by clicking MANUAL ENTRY (a new row will appear at the top of the Record Validation table where the user can input details)

- Input the appropriate material code, quantity and serial number

  NOTE: The same validations that GRT applies to Install Base Creation apply to this method of adding records as well (e.g. PLDS codes cannot be submitted, serial numbers can only be entered if the material code is serialized and quantity is 1, etc.)

- Click SUBMIT

- Click the Export button to download an Excel version of existing records.

- Update any quantities, serial numbers, or remove any records (set qty to 0). Be sure to indicate a value in Column A (Action) for each record being added or updated.

- Save the Excel spreadsheet to your computer

- In GRT, click CHOOSE FILE

- Select the saved Excel spreadsheet

- Click UPLOAD RECORD VALIDATION INFORMATION (the information updated in the Excel spreadsheet will appear on the screen)

- Click SUBMIT

Roles and Responsibilities when performing Record Validation

Scenario	Scenario Description	Party/Circumstance	Responsibility
1	The customer engages APS to install Avaya product	**APS Project Manager**	Completes Equipment Removal in GRT
		APS Software Specialist	Provides information to APS PM as needed
		Avaya Account Manager	Provides information to APS PM as needed

2	The customer engages a Business Partner to install Avaya product	**Business Partner**	Completes Equipment Removal in GRT and Updates CM Main/Remote Survey via GRT
3	A Business Partner uses a third party, other than APS, to install Avaya product	**Business Partner**	Completes Equipment Removal in GRT and Updates CM Main/Remote Survey via GRT
4	The customer installs Avaya product and has engaged Avaya to certify the equipment	**Avaya System Engineer** that supports the account	Completes Equipment Removal in GRT; also updates CM Main/Remote Survey
5	The customer installs Avaya product and has engaged a Business Partner to certify the equipment	**Business Partner**	Completes Equipment Removal in GRT and Updates CM Main/Remote Survey via GRT
6	The customer has existing equipment they are looking to bring under an Avaya maintenance agreement; the customer has engaged **either Avaya or a Business Partner** to certify equip.	Customer has **engaged Avaya**	See Scenario 4
		Customer has **engaged a Business Partner**	See Scenario 5

EQUIPMENT MOVE

Equipment Move is used to update the records of two separate install bases when a device is moved from one location to another. When a user performs this registration type, the material codes and quantities indicated will be removed from the existing Sold To and added to the target Sold To. The SEID's and SE Codes attached to those material codes will also be moved from the existing SoldTo to the target Sold To.

Avaya advises that a Connectivity/Alarming RETETST be performed after the Equipment Move registration is complete to ensure that remote connectivity/alarming are still working correctly at the new Sold To for the devices that were just moved.

NOTE: When a device is moved from a customer's install base via an Equipment Move transaction, the customer's **maintenance contract and billing will NOT be updated automatically i.e. active maintenance**

support on the "From" site does not move to the "To" site. GRT will create a Service Request for an Avaya associate to review the customer's account and determine if the maintenance for the records moved should be cancelled, and if necessary termination fees should be billed. Recasts and cancellations can also be submitted to mycontract@avaya.com.

To ensure the customer's billing and support entitlement is updated on both sites correctly, work with your Avaya Account Manager

Steps to perform Equipment Move

- Click EQUIPMENT/SITE MOVE ONLY on the GRT Home screen

- Type in the End Customer's Sold To/Functional Location where the records **currently reside** in the FROM Sold To/Functional Location field

- Type in the End Customer's Sold To/Functional Location where the records **are being moved to** in the TO Sold To/Functional Location field

  Click SEARCH

- Complete the details on the Site Contact Validation screen

  Click NEXT

- Locate the correct record and indicate the quantity that should be moved to the new Sold To/Functional by typing the applicable quantity in the QTY TO MOVE column

- Click SUBMIT

SAL Migration

SAL Migration is used to update the connectivity records of devices that are currently supported through a remote access type *other than SAL* (e.g. modem or IP address), once the customer decides to use SAL to remotely access those devices.

This has been disabled with the TOB Enhancement release on the GRT Main Menu. SAL migration needs to be carried out directly on SAL going forward.
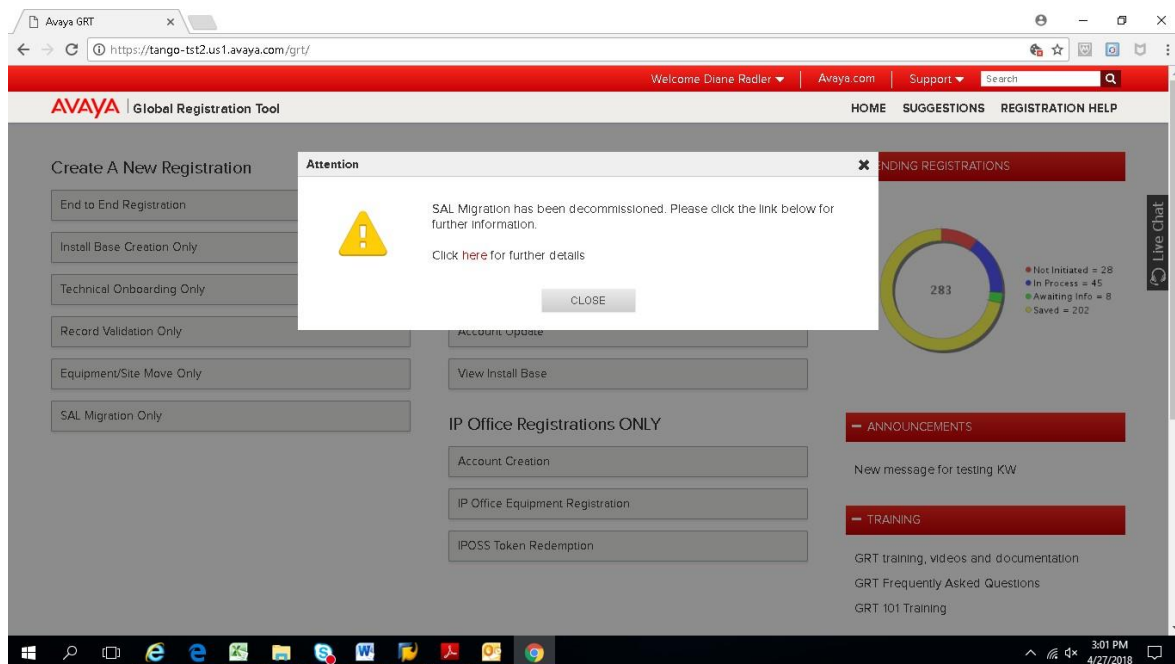
This is the KB article link *http://support.avaya.com/kb/ext/S:SOLN322731*.

Other/Miscellaneous

CM Main/Remote Survey

The CM Main/Remote Survey is used to produce a breakout of the cabinets, gateways and servers for a specific customer's core PBX. This information is used to aid in billing and services for customer equipment residing in multiple locations and specifically used to aid in allocating the different licenses, TDM Ports, LSP's and Servers across a customer's set up in order to bill each location separately.
You can find more information on the CM Main/Remote Survey in the Job Aid below:

- *https://support.avaya.com/css/P8/documents/100175938*

Customer Authorization Tool (CAT)

A Business Partner can only perform registrations for those Sold To's/Functional Locations that an End Customer has given them **registration permissions** for using the Customer Authorization Tool (CAT).
You can find more information on registration permissions and CAT on the support site below:

- *https://support.avaya.com/cat*

Material Code Considerations

Many material codes can be added, moved, removed or otherwise updated using GRT. There are certain exceptions to this rule, for instance:

- **PLDS** material codes must be added, moved and removed from a customer's install base using PLDS, not GRT. GRT will display any PLDS material codes that appear on the customer's install base but the user cannot update them directly in GRT; all such changes must be completed in PLDS. However, users can Technically Onboard any PLDS material codes that are on the install base and are eligible for Technical Onboarding; those PLDS material codes will be Technically Onboarded using the same process as all other hardware material codes.
- **If Nortel "blue" products are covered by a Nortel "blue" maintenance support contract (e.g. EXPRESS, PASS), then you SHOULD NOT register the products in GRT.** All changes, including adding/removing products as well as moving existing products to a different location, must be made by updating the maintenance support contract directly and you should work with your Avaya Account Manager to do so. Any updates you make in GRT will not inherit the entitlements from the contract *and may cause separate entitlement issues.*
- **If Nortel "blue" products are covered by an Avaya "red" maintenance support contract (e.g. Support Advantage), then you MUST register them in GRT as you would with any other product.**

- All eligible products, **whether they are Nortel "blue" or Avaya "red" products,** regardless of what type of maintenance support contract they are covered by, MUST be Technically On boarded in GRT. In practice, most Nortel "blue" products will not require Technical Onboarding because they do not support remote access. However, for those Nortel "blue" products which are eligible, you should Technically Onboard them using GRT.

- **Data/networking** material codes should be registered in GRT as long as the End Customer is covered by an Avaya "red" maintenance contract such as Support Advantage.

- Any material code that is **not eligible** to be included on an End Customer's install base (e.g. Services Offer Tracking codes or material codes without a Maintenance Price Class) cannot be added in GRT.

Pending Registrations Graph

On the GRT Home screen, there is a circular Pending Registrations Graph that indicates all of the registrations that a user has submitted that have not completed. When referencing the Pending Registrations Graph, keep the following in mind:

- The Pending Registrations Graph displays a count of all of the registrations which have at least one phase with a status of Not Initiated, In Process, Awaiting Information or Saved

- The Graph only considers registrations submitted by the username of the individual SSO login signed into GRT at that time

- The count of "Not Initiated" registrations only applies to End to End registrations and it does not count the Equipment Move status (because the Equipment Move status of an End to End registration will always be Not Initiated)

- If an End to End registration has **multiple statuses** (e.g. Install Base Creation = In Process, Technical Onboarding = Awaiting Information, Record Validation = Saved), each of those statuses will be counted once on the Graph

- If an End to End registration has **duplicate statuses** (e.g. Install Base Creation and Technical Onboarding both = In Process), that status will only be counted once on the Graph

Statuses of registrations in GRT

The statuses that GRT displays for any registration indicate the following:
- **Completed:** the registration has been submitted and all records have been updated successfully

- **Validated:** the Record Validation registration has been submitted as Validated; no more changes can be made to this specific registration

- **In Process:** the registration has been submitted but has not yet completed
  NOTE: if any registration *other than a Connectivity/Alarming Testing request* has been In Process for more than 24 hours, submit an ITSS ticket to have the registration processed manually

- **Awaiting Information:** the registration has been submitted but something abnormal has occurred that has stopped the registration from completing; attention from someone is required

NOTE: if a registration is Awaiting Information and a *SR# is indicated*, an Avaya engineer will complete the SR and update the registration manually, at which time the status will update

NOTE: if a registration is Awaiting Information but a *SR# is NOT indicated* (e.g. SEID Creation has failed for the first time) then it is the user's responsibility to update and resubmit the registration, at which time the status will update

- **Saved:** the registration has not yet been submitted; users can resume a Saved registration and submit it normally, at which time the status will update

- **Cancelled:** the registration has not been submitted; users cannot resume or submit a Cancelled registration and should begin a new registration to make any desired changes

- **Not Initiated:** the registration has not yet been submitted; users can resume a Not Initiated registration and submit it normally, at which time the status will update

How to get help with GRT or registration questions

If you experience a problem with GRT or need help completing your registration, there are three options to get assistance. You can search FAQ's using the Avaya Knowledge Base, chat with a live agent using Avaya's ASK AVA chat functionality, or open a ticket with Avaya's IT department.
You can find more information on each of these three options in the Knowledge Base article below:
- *https://support.avaya.com/ext/index?page=content&id=FAQ105904*

Provide comments and suggestions to Avaya

We welcome any comments or suggestions that users have to improve the Global Registration Tool and process. You can share these thoughts with Avaya using the link below:
- *https://avaya.uservoice.com/forums/190607-global-registration-tool-grt-*

Change History

Rev	Change Detail	Changed By	Date
1	Approved/Adding to AOK	n/a	5/22/2012
2	Approved/Adding to AOK: DOC ID 100162279	n/a	5/22/2012
3	Updating LOA URL; Adding updates to GRT Usage for Install Base and Technical Onboarding Modem; updated Approver	n/a	8/13/2012
4	Removed http://www.calawebregistration.com (decommissioned); CSI-AOR decommission date set of 12/1/12; Added Updates to EMEA and APAC install base and Records Validation; Added References to SAL UI Help Document	n/a	11/5/2012

5	Removed references to CSI-AOR for Canada (decommissioned 12/1/12); Updated notification of US ProdReg decommission date of 1/31/13; replaced mtcaftmkt@avaya.com with correct1usa@avaya.com for Equipment Removals in the US; added URL's for GRT Install Base, Technical Onboarding, Records Validation User Guides	n/a	12/14/2012
6	Reworked the format of the document (adding TOC, formal titles, etc.). Added new sections including escalation handling, background and intro, why registration matters, high level flow, providing feedback, etc. Added roles and responsibilities to the document	n/a	4/11/2013
7	New Document Release for GRT 3.0	Adam Chovan	9/20/2013
8	New Document Release for GRT 4.0	Adam Chovan	8/24/2015
9	Updated Install Base Creation and Technical Onboarding Section	Mary Bora	04/25/2018