VOSS Automate

Upgrade Notes for VOSS Automate 21.4

Release 21.4

Mar 26, 2024

Contents

Upgrade Overview

In a new release, there are a number of changes that could relate to exposing new features or capabilities in the system. The default out of the box system would expose these. However, on a system where the configuration around the user experience has been applied, this might mean some changes to configured menus, display policies, and so on to expose the new features in your setup.

Where relevant, we have included this information with the feature information to assist in planning for configuration changes as part of the upgrades. This setup could vary.

Important: Upgrading by users of Microsoft apps

When upgrading to release 21.3 or above, users of Microsoft apps should after upgrade, select each Microsoft Tenant (`relation/MicrosoftTenant`) in the Admin GUI and click **Save** on it without making any changes.

This step is required so that VOSS Automate can communicate with the Tenant post upgrade. Please perform this step if upgrading from a version below 21.3 directly to 21.4. If this step was done when upgrading to 21.3 previously then it does need to be done again.

Two key features in Automate 21.4 require specific planning:

- Admin Portal Evolution (VOSS-1070)
- VOSS Automate License Enforcement (VOSS-872)

For more information and any planning questions related to these key features in Automate 21.4, please reach out to your dedicated VOSS Solutions Architect or contact us at support@voss-solutions.com.

Admin Portal Evolution

The Admin Portal offers significant benefits over the Classic Admin interface and switching to the Admin Portal is highly recommended. Several commands have been added to the platform CLI to change the default Admin interface from Classic Admin to the Admin Portal. Review the VOSS Automate 21.4 Admin Portal Evolution presentation for benefits, upgrade planning and making the switch.

VOSS-1070: Consolidate Business Admin Portal capabilities with Admin Portal

In VOSS Automate 21.4, the Business Admin Portal (BAP) is replaced by the new, evolved Administration Portal.

Upgrade considerations and recommendations:

- Should your implementation of VOSS Automate included the use of the BAP interface that include template customisations, care should be taken to ensure that these changes are considered in the new Administration Portal.

- For any customization instances, it must be determined how to include the customized behavior in the Admin portal to retain the existing user experience.

- Testing and validating on a representative lab environment is required to ensure that all use cases are considered and that any possible issues are identified and resolved. If this is not an option, your dedicated VOSS Solutions Architect can assist with providing input and suggestions.

- VOSS recommends the inclusion of a plan to incorporate changes during the next upgrade or soon after to realize benefits of the portal evolution.

- Should you require any additional support or information, please contact your dedicated VOSS Solutions Architect or contact the VOSS Customer Success team for further assistance.

- Recommended pre-upgrade actions include:

    - Review menu/landing setups

        * Utilize BAP style dashboards and quick actions, charts, etc.

        * Create new feature dashboards that might make sense in your implementation

        * Other features can be linked in that are not part of dashboards today

        * Review names and descriptions for "What would you like to do?" search ease

    - Review menu/landing setups

        * "What would you like to do?" – go to feature (e.g Subscribers) – no clicking through menus

        * Search - find service instance (e.g Subscriber) and immediately take action – no navigational hops – find menu/feature area, get list of subscribers, filter, etc.

- VOSS provides example setups as part of the product and can engage and help evolve. These examples will match as closely as possible the BAP interface defaults.

- Refer to the Role Management topic in the Core Feature Guide.

VOSS-872 Product Licensing

4.1   Introduction

Post upgrade to VOSS Automate 21.4, a license key must be installed on the platform to ensure no service disruptions are encountered.

As part of the upgrade process, an upgraded platform will be provided with a 7 day grace period in which the license key must be obtained from VOSS.

As part of the upgrade planning, it is recommended that the activity is coordinated with VOSS Customer team (CSA and Customer Success team) to ensure that license keys are provided to you prior to the upgrade:

- Platforms need to be registered with VOSS if not already done
- Platform UUID needed to do this – can be obtained from the license audit file
- Plan for 5 business day lead time to generate the license file once info is provided
- To license through the GUI, follow steps indicated in Product License Management in the Core Feature Guide.
- To license through the CLI, follow steps indicated in Product Licensing in the Platform Guide.

VOSS-1048: MS Teams - Support for Teams management and user assignment

5.1 Introduction

Adds the ability to manage Teams and user assignment as well as managing Teams Templates.

5.2 Access Profiles

Review the default ProviderAdminAP for permission examples for the following model types:

- `relation/MicrosoftTeams`
- `device/msteamsonline/CsTeamsTemplates`

5.3 Menu Layout

Review the default ProviderMenu for configuration examples for the following items:

- **Manage Teams**
- **Teams Templates**

VOSS-1049: Configure External Access settings in Microsoft Teams

6.1 Introduction

Adds the ability to manage External Access settings for Microsoft Teams.

6.2 Access Profiles

Review the default ProviderAdminAP for permission examples for the following model types:

- `device/msteamsonline/CsTenantFederationConfiguration`

6.3 Menu Layout

Review the default ProviderMenu for configuration examples for the following items:

- **External Access**

VOSS-1065: Support 'CsUserCallingSettings' cmdlet for Microsoft Teams to add settings such as call forward and delegation

7.1 Introduction

Adds the ability to manage User Call Settings such as Call Answering Rules, Call Delegation, Forwarding, Dial Out Policy etc for MS Teams Users.

7.2 Access Profiles

Review the default ProviderAdminAP for permission examples for the following model types:

- `device/msteamsonline/CsOnlineUser`

7.3 Menu Layout

Review the default ProviderMenu for configuration examples for the following items:

- **User Calling Settings**

7.4 Field Display Policy (FDP)

A new FDP has been added which should be configured on the new Menu entry:

- Name: **CsOnlineUser_CsCallingSettings_FDP**
- Target model: `device/msteamsonline/CsOnlineUser`

VOSS-1098: Microsoft Group sync ability

8.1 Introduction

Adds the ability to import and view Groups. Add, Modify or Delete of Groups is not supported in this release.

8.2 Access Profiles

Review the default ProviderAdminAP for permission examples for the following model types:

- `device/msgraph/Groups`

8.3 Menu Layout

Review the default ProviderMenu for configuration examples for the following items:

- **Groups**

VOSS-1061 Updated support for new Webex App calling APIs

VOSS-Automate can now fully sync Webex App Subscriber settings and Calling Behaviour and provision changes. The requirement for CSV file loading to complete provisioning steps is removed and VOSS-Automate now stays in sync with the Control Hub Subscriber settings, for example if changes are made locally.

1. Carry out a force-refresh sync of all `device/spark/models`.

   Note: Sync in UCServiceProfiles before syncing in Webex App Users.

2. Ensure that **Quick Import** is set to False on *all* data syncs that include the device/Spark/user model. By default, these are the two syncs called: "SyncSparkUsersXXX" and "SyncSparkXXXX".

   (Currently in release_21.4, the default setup of these Spark syncs are set to true. This now needs to be set to false in order to sync in Calling Behaviour settings)

3. (For existing Webex App deployments), To support an update to the `device/spark/User` summary attributes, run the VOSS Automate CLI command:

   ```
   voss migrate voss migrate_summary_attributes device/spark/User
   ```

4. When removing Webex App Calling (with CUCM) from a WebexApp user, administrators should set the Calling Behaviour back to Webex App Calling. (Not to blank)

5. There is now a setting in the VOSS-Automate Control Hub (`relation/SparkCustomer`) settings with a new field to indicate whether the Organisation is DirSynced. VOSS-Automate workflows will provision the Webex users E164 or DN numbers in the Control Hub when the Organisation is NOT dir-synced. E164 numbers are configured if the Subscriber has both a DN number and an E164 number.

6. There are also VOSS-Automate Control Hub (`relation/SparkCustomer`) settings for:

- Default Calling Behaviour:

  If any **Webex App Account** option below was used prior to upgrading, verify the **Default Calling Behaviour** change:

  - "Calling in Webex Teams" changed to "Calling in Webex App"
  - "Calling in Webex Teams (Unified CM)" changed to "Calling in Webex App (Unified CM)"

- Use Organization's Domain
- Default UC Manager Profile.

These settings are used as 'fall-back' settings in the event that the SiteDefault Webex User settings are not set for individual sites.

A Default UC Manager Profile must always be set, even if the Use Organization's Domain field is set to true. (This is required when setting Calling Behaviour to Use Jabber App)

7. As UC Service Profiles are now synced in from the Control Hub, these settings no longer need to be loaded manually into the VOSS-Automate Control Hub (`relation/SparkCustomer`) settings.

8. When using QuickSubscriber to provision WebexApp services, the SiteDefaultsDoc - User Defaults should be set to either:

   - Webex App - Use Organization's Domain = True

   or

   - Webex App - UC Manager Profile = <Selected UC Profile>

9. The macro `WT_UC_MANAGER_PROFILES` has been changed to use the new method for looking up Calling Profiles

```
(( fn.is_none_or_empty macro.WebexAppCallingProfileListMCR == False )) <{{ macro.
↪WebexAppCallingProfileListMCR }}> <{{ fn.list_empty }}
```

The `device/spark/User` CFTs used by Quick Add Subscriber should be updated to set: `template.settings.calling.use_org_domain` field:

```
(( fn.is_none_or_empty macro.SDD_WtCallBehaviourUcManagerProfile == false )) <{{ fn.
↪false }}> <{{ fn.true }}>
```

10. See for example the setting in the CFT for `device/spark/User` called: *Webex App User - Messaging & Meetings & Webex Calling via CUCM - CSF Jabber Device*

11. When VOSS-Automate deletes Webex App Calling (with CUCM) from a Webex User, it achieves this by removing the 'On-Prem UCM Calling' licence from the WebexUser.

    This is a requirement of the Cisco WebexControlHub API.

12. Previously configured Global settings for CSV file creation should be disabled, and menus relating to CSV file creation can be deleted.

VOSS-1045: Remote Destination schedule management support for the Admin Portal

10.1 Introduction

Adds Ring Schedule fields to the Remote Destinations of Single Number Reach for subscribers. In addition a new optional standalone relation has been added for managing Single Number Reach which can be exposed as a separate menu item (`relation/SingleNumberReachREL`).

Note: If Ring Schedules are currently being managed by end users in Self-service, then management of Ring Schedules should not be done from the Admin Portal. Ring Schedules which have been added from Self-service will be made read-only in the Admin Portal to avoid conflicts/overwrite.

Due to changes introduced in Unified CM AXL API by the following Cisco defect fix: CDET CSCvb47065, performing updates from the Admin Portal to existing Ring Schedules will not be possible in earlier versions of Unified CM. Updating is only supported from Unified CM 11.5.1 SU10, 12.5 SU6, 14.0 or later. Earlier versions the Ring Schedule need to be removed entirely and then re-added in order to make modifications.

10.2 Access Profiles

Review the default ProviderAdminAP for permission examples for the following model types:

- `relation/SingleNumberReachREL`

10.3 Menu Layout

Review the default ProviderMenu for configuration examples for the following items.

- `Single Number Reach`

10.4 Field Display Policy

The existing FDPs for Subscribers (`relation/Subscriber`) have been updated to expose the new Ring Schedule fields.

- Target Model Type: `relation/Subscriber`

EKB-13932: Expose CFWD No Answer Ring Duration and Unregistered fields in Self-service

Self-service language packs have been updated for this issue. If these are required, log in on the Customer Portal and obtain the latest language packs from **Downloads > VOSS Automate > Language Packs**.

EKB-7419: Add E164 management for non-HCS dial plans and Enterprise deployments

12.1 Introduction

Adds E164 management for non-HCS dial plans and Enterprise deployments. For Enterprise deployments, the following new menus can be exposed for managing E164 Numbers (these menus are typically already exposed for Provider deployment types):

When using non-HCS dial plans, i.e. the Generic Dial Plan Tool, a new field will be exposed on the **Associate E164 to DN pages** called **Dial Plan Model Selection**, which will show a list of Translation Dial Plan models added which will define the value used when adding the translation pattern for non-translation fields like Partition, CSS, etc.

12.2 Access Profiles

Review the default ProviderAdminAP for permission examples for the following model types:

- `data/HcsDpE164InventoryDAT`
- `view/FHcsE164InventoryMgmtView`
- `relation/HcsDNE164AssociateREL`
- `relation/HcsDNMultiE164AssociateREL`

12.3 Menu Layout

Review the default ProviderMenu for configuration examples for the following items:

- `E164 Inventory`
- `Add E164 Inventory`
- `E164 Associations (N to N DN)`
- `E164 Associations (N to 1 DN)`

EKB-13980: Add filtered "Replace Phone" configuration templates (CFTs) to ensure selection of correct CFTs

Adds a GUI rule to the Replace Phone feature page so that only phone Configuration Templates which have a "Custom feature usage identifier" value of "replacecephone" will appear in the dropdown instead of showing all Phone related CFTs. If any custom Replace Phone CFTs have been created these will need to be modified post upgrade and the "replacephone" Custom feature usage identifier added else they will not be shown in the dropdown.

Eleven example CFTs for different phone models have also been added to use as a reference when creating custom CFTs, for example: "Replace Phone Template 8841 SIP"

EKB-4889: Customer admin should not be able to add "Standard CCM Super Users" group to subscriber

Adds a new Global Setting called "Disallowed CUCM User Groups" under the User tab. Unified CM Access Control Groups which allow administration privileges can be defined, in a colon separated list eg: Standard CCM Super Users:Standard CCM Admin Users, this list of Groups then cannot be assigned to a Subscriber, or set via Quick Add Subscriber, which prevents CUCM End Users from being assigned admin privileges to Unified CM.

EKB-4480: Add support for panel display in Field Display Policy

Adds a new field to Field Display Policy called "Display Group As". This adds the ability to display groups as Panels in the Admin Portal, instead of Tabs. The previous default display method of Tabs and Fieldsets has been included in this new dropdown field. In 21.4 Release the default display method, when no value has been defined in "Display Group As" field, will be Tabs.