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OBiTALK Device Management Portal

Frequently Asked Questions

Revision 1.1 | December 2016

General Operations

What is the OBiTALK DMP?

The **OBiTALK Device Management Platform (DMP)** portal is a cloud-based management tether to the OBi endpoints for secure and remote provisioning, real-time call status reporting and troubleshooting, device UI management and more. Essentially, OBiTALK provides access to the configurations of the endpoints regardless of location, making it as if they are virtually sitting right at your desk.

We have designed this management tool specifically for use of service providers, system integrators and value-added resellers (VAR) all over the world. When a user is logged in to the OBiTALK DMP, they can manage all their OBi endpoints remotely using a mainstream browser, enabling fast and easy device deployment and maintenance.

What are the main functions in the OBiTALK DMP?

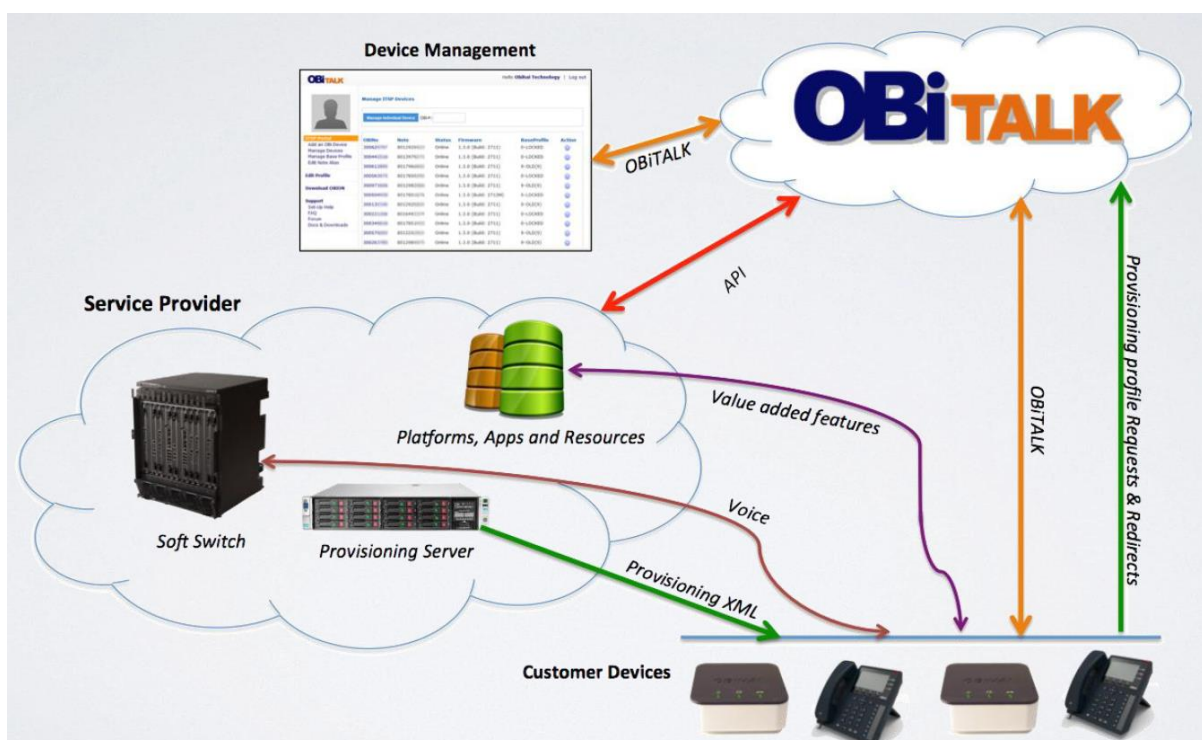
Functions in the main menu:

- **Add Device:** Add an online device to your DMP portal manually using a service activation code. This will assign a non-affiliated (NA) profile, targeted for end-users subscribing a BYOD service.
- **Manage Base Profiles:** Construct and name your Base Profiles here
- **Edit Note Alias:** Form up a naming format for device notes based on parameter values of device
- **Claim Device:** Assign devices to bootstrap to your DMP portal with Zero-Touch (ZT)
- **Tools:** Additional device management tools in the portal
- **Manage Organizations:** Group devices in the DMP to accounts and sub-accounts.
- **Manage Users:** Add and assign users to specific privileges in the DMP portal.
- **Firmware:** Access the latest firmware and release notes for OBi devices.

Functions NOT in the main menu:

- **Download Device Information:** Obtain a csv record of devices and attributes.
- **Download OBiTALK Profile and/or Local Configurations:** Download a target device's parameter values as an XML file, as they have been assigned in OBiTALK and/or the devices *actual* running 'local' configuration.
- **Reset OBiTALK Configuration and/or Local Configuration:** Flush out your current device configuration to start a new one.
- **Remote PCAP, Syslog Capture, Speed Test, and SIP ALG Test:** Remotely capture logs and statistics of device for monitoring and troubleshooting purposes (Cloud Management Advanced subscribers only)

How does the OBiTALK cloud fit in the VoIP ecosystem?



The OBiTALK cloud belongs as an external “out-of-band” tether to the connection between the OBi devices and the service providers.

In a way, OBiTALK can be used to provision their OBi endpoint deployments without the need to operate their own provisioning server. Also, with every OBi device tethered to the OBiTALK cloud, one can access and change the configurations of the device from within the OBiTALK DMP Portal.

Service providers will have the choice to use OBiTALK as their provisioning source, to use their own, or both. This gives OBi devices more utility and flexibility for the different kinds of VoIP device deployments out there.

How can OBiTALK cloud and the DMP help my business?

For Deployments

With Zero Touch (ZT) customization, there is no need to configure each device one-by-one and repackage it before shipping to the end-user. When first turned on and connected to the internet, each device is already pre-configured to request a profile of provisioning parameters from the OBiTALK cloud. So when one or multiple deployed devices are shipped to the end-user, they are already managed by the service provider or the VAR. This “plug-and-play” experience reduces deployment delays and complexities.

For Technical Support and Maintenance

When these deployed VoIP endpoints are already at end-user premises, in many cases service providers and VARs have limited access to the configurations of your deployed devices. So whenever there is a reported problem, usually the service provider or VAR would have to either 1) retrieve it, fix it and resend it or 2) dispatch your maintenance staff for a site visit. Here, the OBiTALK DMP enables service providers and VARs to execute their maintenance operations and technical support remotely from their office, for example. Additionally, the OBiTALK cloud can help keep device firmware up-to-date with new features, further enhancing end-user experience and enterprise investment.

(For Cloud Management Advanced only) Through the OBiTALK cloud tether, the DMP portal can also capture syslog, fetch PCAP, and perform SIP ALG and Speed Tests for a certain device under subscription. This is designed to empower service providers and system integrators even more on remotely troubleshooting devices for their OBi endpoints.

I am a service provider or a VAR who deploys OBi devices using OBiTALK, but I do not have a DMP account. How can I get my account upgraded?

If you are using a non-DMP account, you would need to register a new account at <http://www1.obitalk.com> with an email that you have never used for OBiTALK before. Next, apply at our partner program at www.obihai.com/partner/partnerapp. Make sure you state in the application form that you are a current OBiTALK user and that you are requesting a DMP account.

Where can I find the latest firmware for my devices?

For the latest firmware and release notes targeted to service providers and system integrators, please sign-in to your [OBiTALK Device Management Platform \(DMP\)](#) account, then head over to the **Firmware** section on the portal.

Our firmware links follow the format below (let x = 0,1,2,3,4,5,6,7,8 or 9):

For OBi3 series: <http://fw.obihai.com/OBi202-x-x-x-xxxx.fw>

For OBi5vs series: <http://fw.obihai.com/OBi500-x-x-x-xxxx.fw>

For OBi1000 series: <http://fw.obihai.com/OBiPhone-x-x-x-xxxx.fw>

OBIVOICE

[Add Device](#)
[Manage Devices](#)
[Manage Base Profiles](#)
[Edit Note Alias](#)
[Claim Device](#)
[Misc. Tools](#)
[Manage Organizations](#)
[Manage Users](#)

Firmware
Download OBiON
Forum Registration
Support

[Set-Up Help](#)
[FAQ](#)

Product Line	Current Firmware	Release Notes	Release Date	Previous Firmware	Cumulative Release Notes
OBi3 Series Universal Voice Adapters	3-0-1-5079	Release Notes	2016-03-03	3-0-1-4738	Release Notes
OBi5vs Series Universal Voice Adapters	4-0-1-5235	Release Notes	2016-05-24	4-0-1-4764	Release Notes
OBi1000 Series IP Phones - 5.0	5-0-2-3855	Release Notes	2016-10-05	5-0-0-3806	Release Notes
OBi1000 Series IP Phones - 5.1	5-1-2-3855	Release Notes	2016-10-05	5-1-0-3806	Release Notes

To get the link of the firmware you want, copy the firmware's link address in the page.

How can I automatically update the firmware for my devices?

Head over to OBiTALK Configuration. Next, go to System Management/Auto Provisioning/Auto Firmware Update. Uncheck the *Device Default* and *Wizard Setting* boxes, and then change the following parameter values:

Method: Periodically

Interval: 86400

FirmwareURL: IF (\$FWV < x.x.x.xxxx) FWU < Firmware Link Here >

Notes:

- the value for *Method* and *Interval* is optional. The values shown above here is just a recommendation.
- Interval* value is in seconds
- The IF condition there at the *FirmwareURL* is just to make sure that the OBi device does not download any firmware files if the version is already updated.
- Enter the firmware version number where the x.x.x.xxxx exists in the IF condition e.g. 5.0.2.3855
- Don't forget to escape the operators when configured or changed in the Base Profile/XML editor

Alternatively, you can use this Base Profile by changing the *FirmwareURL* accordingly to Firmware you want to upload. Here is an example of a Base Profile you can use for automatic firmware upgrade to version 5.0.2.3855 for the OBi1000 series:

```

<?xml version="1.0" encoding="UTF-8"?>
<ParameterList>
  <O>
    <N>X_DeviceManagement.FirmwareUpdate.</N>
  <P>

```

```

        <N>Method</N>
        <V>Periodically</V>
    </P>
    <P>
        <N>Interval</N>
        <V>86400</V>
    </P>
    <P>
        <N>FirmwareURL</N>
        <V>IF ( $FWV < 5.0.2.3855 ) FWU
http://fw.obihai.com/OBiPhone-5-0-2-3855.fw</V>
    </P>
</O>
</ParameterList>

```

How can I control the privileges of each user at my DMP account?

Go to the Manage Users page on the DMP if you are a Domain Admin. Here you can restrict a particular user from the features in the DMP. There are two types of “privileges” for an email account registered in your DMP: *Domain Admin* and *Super User*.

You can control which account gets none, *Domain Admin*, *Super User*, or both by accessing the Manage Users page and select the checkboxes under each category. Once you selected your checkboxes, press “Update Account.”

	None Checked	Domain Admin	Super User
Add Device			✓
Manage Devices	✓	✓	✓
Manage Base Profiles			✓
Edit Note Alias			✓
Claim Device			✓
Misc. Tools			✓
Manage Organizations		✓	
Manage Users		✓	
Firmware	✓	✓	✓

Does the OBiTALK DMP come with additional costs?

Every OBi device comes with the DMP’s “Cloud Management Basic” service, hence there are no additional costs to using the DMP features.

Coming in 2017, there will be an annual subscription service called “Cloud Management Advanced (CMA).” This will add-on more monitoring and troubleshooting features to the DMP portal. Contact Obihai Service Provider Support at spsupport@obihai.com for more details.

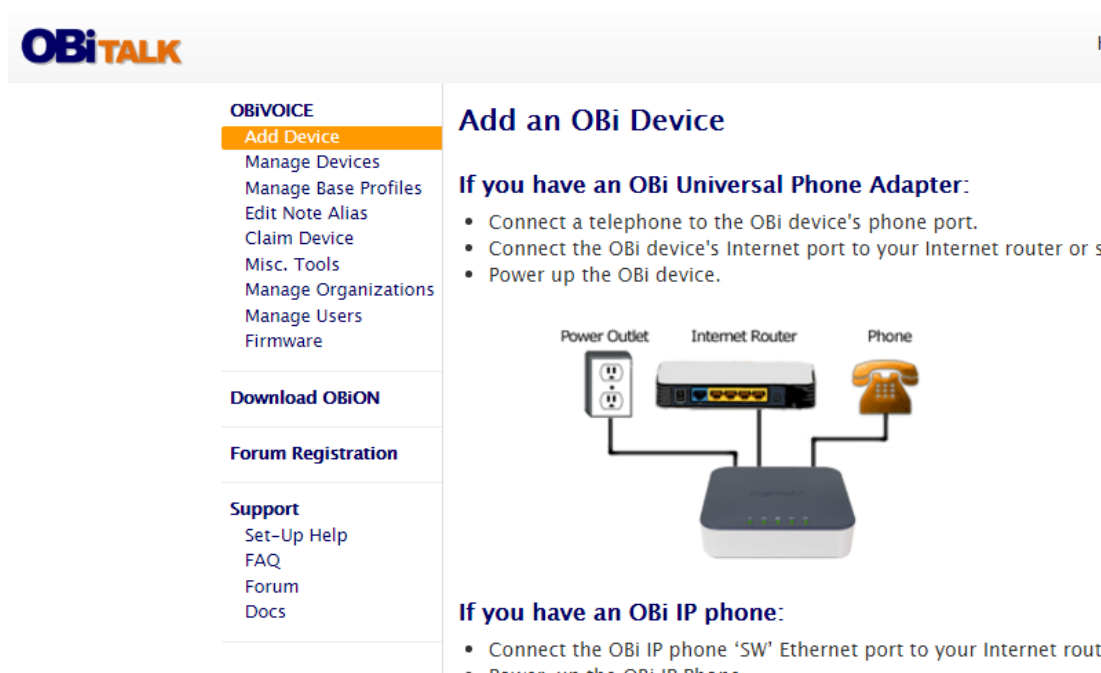
Adding Devices To Your Portal | Zero-Touch (ZT) Customization

How do I add OBi devices to the OBiTALK DMP portal?

There are multiple ways to incorporate OBi devices to the DMP portal. This is to accommodate almost all kinds of device deployment or service scenarios, ranging from bring-your-own-device (BYOD) services to mass-scale deployments.

Add Device (for end-user BYOD deployments)

The 'Add Device' feature is located at the left-hand menu of the portal. This can be done when the OBi device is physically with you or with your customer, as it requires you to dial a service activation code on the OBi device's digit map (e.g. **5 1234). Simply follow the instructions in the web page and you should be able to add the device to your DMP account. This method, however, does not assign a ZT profile but still pairs the devices to the DMP portal for provisioning and day 2 management.



The screenshot shows the OBiTALK portal interface. On the left is a navigation menu with the following items: **OBiVOICE**, **Add Device** (highlighted), Manage Devices, Manage Base Profiles, Edit Note Alias, Claim Device, Misc. Tools, Manage Organizations, Manage Users, Firmware, **Download OBiON**, **Forum Registration**, **Support**, Set-Up Help, FAQ, Forum, and Docs. The main content area is titled 'Add an OBi Device'. It includes a section 'If you have an OBi Universal Phone Adapter:' with a bulleted list: 'Connect a telephone to the OBi device's phone port.', 'Connect the OBi device's Internet port to your Internet router or switch.', and 'Power up the OBi device.' Below this is a diagram showing a Power Outlet connected to an Internet Router, which is then connected to an OBi device. A Phone is also connected to the OBi device. Another section, 'If you have an OBi IP phone:', is partially visible with a bulleted list: 'Connect the OBi IP phone 'SW' Ethernet port to your Internet route' and 'Power up the OBi IP phone'.

Claim Device (for service provider CPE deployments)

Using your OBi device's MAC address and Serial Number, you can add the OBi devices to your DMP account without the need to 'touch' it. You can claim one device or multiple devices at once. For claiming multiple devices, you would need to construct a Comma Separated Values (.csv) file and enter the MAC addresses there. Unlike "Add Device," this feature will assign ZT profiles to your devices.

OBiVOICE

- Add Device
- Manage Devices
- Manage Base Profiles
- Edit Note Alias
- Claim Device**
- Misc. Tools
- Manage Organizations
- Manage Users
- Firmware

Download OBiON
Forum Registration
Support

- Set-Up Help
- FAQ
- Forum
- Docs

Claim Device for ZT Customization

Use this tool to add uncustomized devices, not already assigned to your account, to the database. Uncustomized devices which have been assigned to another OBiTALK Device Management Platform account or previously assigned to a ZT customization profile cannot be claimed using this tool.

Claim a single device
Please Submit Device MAC Address and Serial Number

MAC:

SN:

ZT Profile:

Organization:

Claim
Claim multiple devices

Select Devices List File:

Contact Obihai Service Provider Support Team

With every OBi device you purchase, we will honor requests to assign ZT customization profiles for your DMP account. Just provide us with the MAC addresses of the devices and email it to spsupport@obihai.com. This action, of course, will need to be requested with authorization from the actual purchaser of the devices.

Should I get Zero-Touch customization for my OBi devices?

Each time you purchase a brand new OBi device, you have the option either to assign the device a Zero-Touch (ZT) customization profile or a generic customization profile denoted "N/A." You can view the customization status of an OBi device through its webpage UI at Status/System Status (left image) or through the "ZT" column at the "Manage Devices" page in the DMP portal.

- Setup Wizard
- Status
 - System Status**
 - Call Status
 - SP Service Stats
 - Line Status
 - OBiPLUS Status
- OBiWiFi Configuration
 - WiFi Settings
- System Management

BaseProf	InitDate	ZT
Deployment A (3,18,19)	Jan 13, 2017	Yes
100% Blank	Nov 29, 2016	Yes
POS Terminal	Nov 14, 2016	Yes
Deployment A (3,18,19)	Nov 11, 2016	N/A

ZT Profile

Zero-Touch (ZT) is a process whereby a new OBi device gets provisioned by OBiTALK with customized default values for a small subset of device configuration parameters. ZT is a **one-time** process that takes place when the phone is connected to the Internet and has access to the OBiTALK network for the first time. The set of customized default parameter values is then specified in a normal OBi device configuration file, and hence is called a ZT Profile. After ZT, the device can be configured normally to have any parameter values. Also, if the device goes through a factory reset, the device will revert back to the customized default values.

A typical parameter default here would be to customize the *ConfigURL*, which tells the device where and how to load its profile from a provisioning server. Also when a ZT customization profile is already assigned, the device is automatically bootstrapped to your portal - making it so that it will always return to your management domain regardless having it undergo factory reset.

N/A Profile

You can think of this as a non-ZT profile, meaning the default parameters are factory defaults, and it is not committed to any DMP account. Some service providers or VARs do not wish to assign ZT customization profiles to their device, depending on how service providers or VARs deployment scenario. For example, some customers could purchase the OBi cloud-managed IP phone fully and subscribe services without any binding contracts, giving them freedom to switch away to other VoIP services.

How do I update my Zero-Touch customization profile?

For a ZT profile, you would need to work with Obihai SP Support on this. Send an email to spsupport@obihai.com along with an XML script for the Zero-Touch profile you want. After evaluation, we can apply the ZT profile for a certain device family i.e. OBi3 Series, OBi5vs Series, and OBi1000 Series.

Can I still do provisioning auto-recovery with an N/A profile?

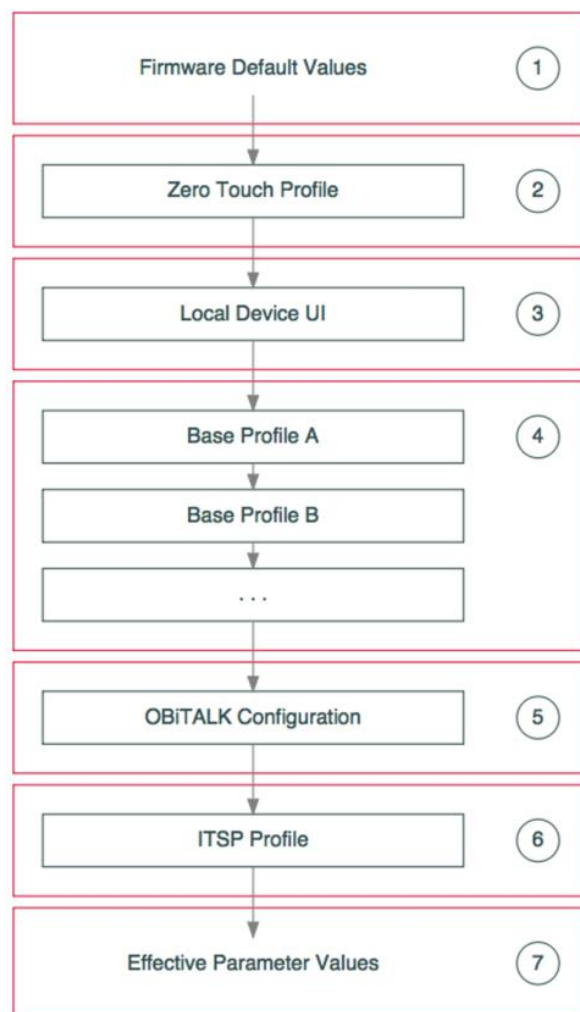
No. When a device with an N/A profile has undergone a factory reset, it will not recover to the DMP portal. In this case, the device would have to be re-added again using the "Add Device" feature to get provisioning from OBiTALK once again. The good news, however, is that OBiTALK DMP will still store the specific configurations it previously had.

Provisioning with OBiTALK DMP

What are the sources of provisioning for the OBi device and how does one win against the other?

OBi devices are designed to adopt multiple sources of configurations. However, a device can only take one final value for every parameter. Generally speaking, if multiple configuration files are pushed to the OBi, they would conflict with each other. To eliminate this problem, there must be a way to sort out which configuration file wins over the other.

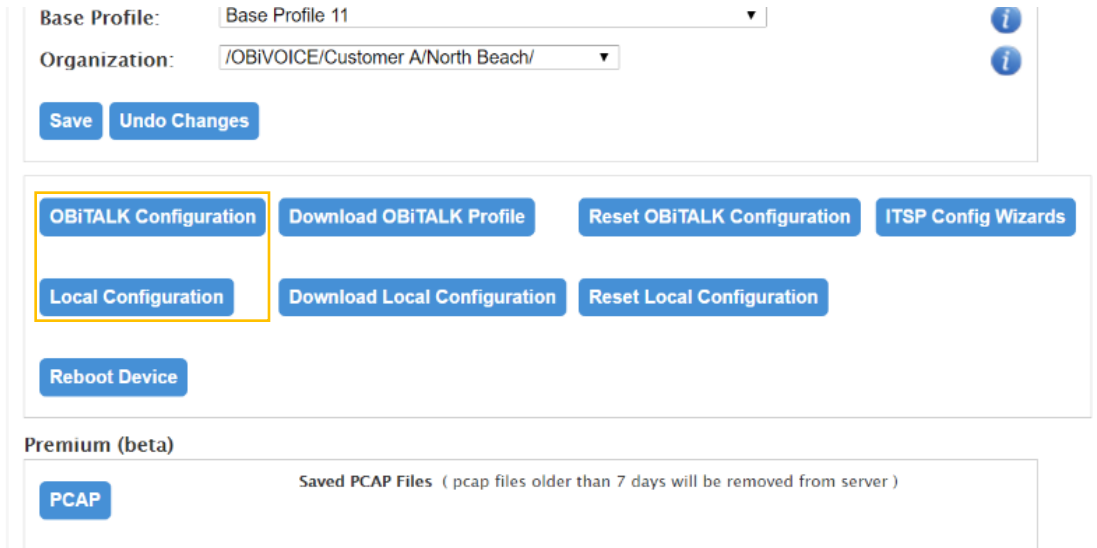
The diagram below illustrates how various configuration profiles are ordered by precedence. The configuration flow is analogous to a waterfall: values can be changed by each consecutive level of configuration, starting from the firmware built-in default parameters. If a configuration level does not explicitly include a parameter, the previous value for that parameter will carry over to the next level. Each parameter value is updated independently of the others. *Refer to the numbered notes below for additional details on each layer.*



Layer	Annotations
1	Firmware Built-In Values. Each parameter has a default value built into the firmware. We recommend that all subsequent configuration levels include only those few settings that are meaningful at that level, leaving all other parameters at default, as set by the firmware. The configurations below should never be full profiles.
2	Zero Touch. ZT profiles are used to set parameters to a designated default value. This is a one-time process, and only occurs when the device is first turned online. Obihai Service Provider Support can help generate a ZT profile for the organization. Contact spsupport@obihai.com for assistance.
3	Local Device UI. Local settings can be convenient for exploring the functionality of a device, but would normally not be used in production deployment. Instead, devices should be provisioned using a combination of base profiles, OBiTALK configurations, and ITSP provisioning. A factory reset operation on the device (via ***, 8, 1 , or via the GUI menu on a phone) will clear only this configuration layer. To set any one parameter via the local device GUI, uncheck the default flag, and specify a value for that parameter.
4	Base Profiles - Containers. The illustration is meant to indicate that base profiles can be applied individually or jointly when set as a container (there is a checkbox on Base Profiles 30 to 59 to enable container mode). In the case of a container, the component profiles are applied in the order listed within the container resource.
5	OBiTALK Configuration. The parameters controlling OBiTALK provisioning are under <code>X_DeviceManagement.Provisioning</code> . We recommend that you leave this parameter untouched or set as default in the ITSP Provisioning layer. An OBiTALK configuration reset operation will clear both this configuration layer as well as the local device layer. To set any one parameter via the OBiTALK portal, uncheck the “wizard” flag, and specify a value for that parameter or “default” to set it to default value.
6	ITSP Provisioning. Configure access to the ITSP provisioning server using the <code>X_DeviceManagement.ITSPProvisioning.*</code> parameters. We recommend provisioning those parameters which should differ from their default settings, and which are not already configured by either base profiles or OBiTALK configurations.
7	Final Values. The effective parameter setting. These can be viewed via the Local Configuration in the DMP device page. Can also be viewed via browser on the local device GUI at <a href="http://<Device IP Address>">http://<Device IP Address>

What is the difference between OBiTALK Configuration and Local Configuration?

The OBiTALK cloud has the ability to store and push all parameters and its values to the OBi device. On the other hand, the device itself locally stores a set of configuration parameters as well. The main difference here is where the configuration has been implemented.



The screenshot shows a web interface for configuring an OBi device. At the top, there are two dropdown menus: 'Base Profile:' with 'Base Profile 11' selected, and 'Organization:' with '/OBiVOICE/Customer A/North Beach/' selected. To the right of these are two information icons. Below the dropdowns are two buttons: 'Save' and 'Undo Changes'. A yellow box highlights a section containing two rows of buttons. The first row has 'OBiTALK Configuration', 'Download OBiTALK Profile', 'Reset OBiTALK Configuration', and 'ITSP Config Wizards'. The second row has 'Local Configuration', 'Download Local Configuration', and 'Reset Local Configuration'. Below this section is a 'Reboot Device' button. At the bottom, there is a 'Premium (beta)' section with a 'PCAP' button and a note: 'Saved PCAP Files (pcap files older than 7 days will be removed from server)'.

OBiTALK Configuration: This corresponds to the configurations stored in the OBiTALK cloud. All OBiTALK configuration settings, by default, are programmed to push its latest parameter changes to Local Configuration. The only time where OBiTALK Configuration parameters are not in sync with Local Configuration is when OBiTALK Provisioning is disabled.

Local Configuration: This corresponds to the true configurations of the phone. This is a useful tool to check and see if the parameters in OBiTALK Configuration are already pushed from the OBiTALK cloud to your OBi IP phone or phone adapter. When OBiTALK Provisioning is not disabled, the OBiTALK Configuration parameters will overwrite the Local Configuration's.

Why are my OBiTALK Configuration parameters not sticking in?

This is usually due to a parameter being provisioned by the ITSP Provisioning. Parameters touched by ITSP Provisioning cannot be further modified by OBiTALK Provisioning – this is to prevent conflict from both provisioning sources.

Another possibility is that OBiTALK Provisioning is disabled. The OBiTALK Configuration is where your parameter values are stored in the cloud, not your device. Check in the Local Configuration page of this particular device in the DMP portal if the Method under OBiTALK Provisioning is “Disabled.” If it is not disabled, try factory resetting the phone or check if any parameter from ITSP Provisioning is disabling OBiTALK Provisioning.

Refer to the section *“What are the sources of provisioning for the OBi device and how does one win against the other?”* in the FAQ for more details.

How can I take the configurations of one OBi device and push it to the others?

The OBiTALK DMP portal has a feature called *Base Profiles* that enables this activity. The powerful benefit of *Base Profiles* is that it can change multiple parameters simultaneously, and can be pushed to multiple selected devices managed by your OBiTALK DMP account. Overall, it is a great time-saving tool.

Base Profiles, however, is not designed to configure unique parameters like SIP username and password for multiple devices. To do this, the user either has to push these configurations from the service provider's own provisioning server or access the "OBiTALK Configuration" page and enter them manually.

OBiVOICE

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Manage Organizations – /OBiVOICE/

+ Create New Organization

	Note	Default BaseProf	
Customer A	San Francisco, CA	0	Edit Manage
Customer B	Los Angeles, CA	11	Edit Manage
Customer C	San Antonio, TX	12	Edit Manage
Customer D	New York, NY	32	Edit Manage

The DMP portal also provides a feature to group your devices into organizations (shown above). To access this feature, go to "Manage Organizations" in the DMP's left-hand menu. With the organizations all sorted out, the user will be able to assign *Base Profiles* on an Organization, making it easier to push configurations at a large scale.

What are *Base Profiles*?

A *Base Profile* is a set of commands via secure XML that changes parameters from their default values. With this, you don't have to individually go and change the parameters of OBi devices one-by-one.

Each device can be only assigned to one Base Profile, but there are container Base Profiles which can combine multiple existing Base Profiles into one. Please note that a ZT profile is not the same as a Base Profile.

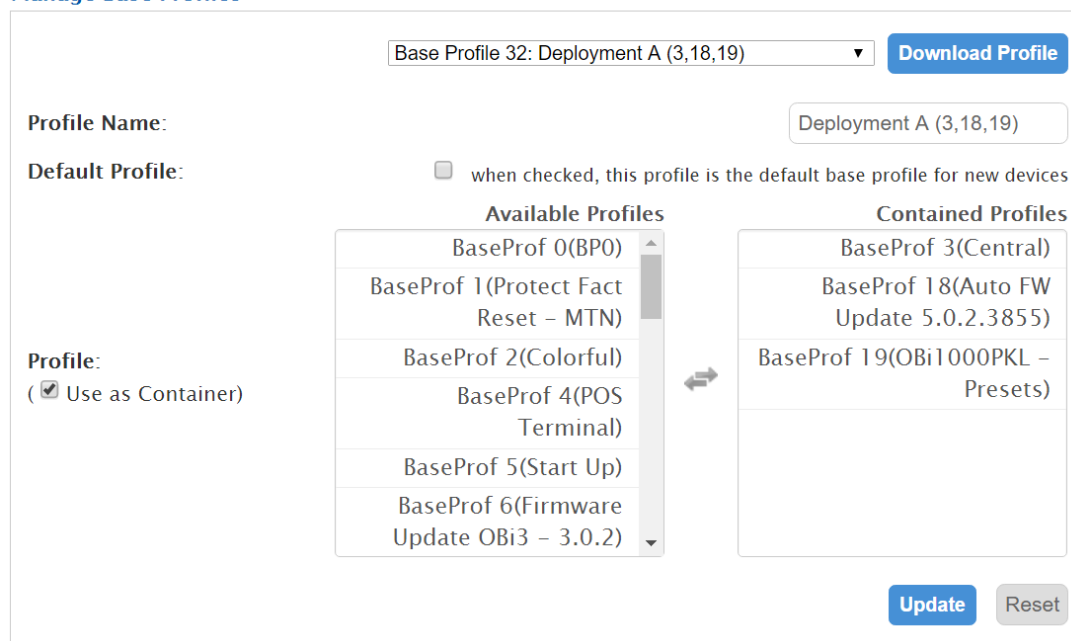
What is the difference between a ZT customization profile and a Base Profile?

The parameter values on the ZT profile come as a default for the device, whereas the Base Profile changes the parameter values away from their default parameter values. ZT is also a one-time process at the initial stage of the device's life, while Base Profiles can be continuously changed.

Where can I set a Base Profile as a container?

There are up to 60 Base Profiles per DMP account, numbered from 0 to 59. From Base Profile 30 to 59, there is a “Use as container” checkbox. When checked the Base Profile can be used to combine multiple Base Profiles that are already saved. Just click on the particular Base Profile you want to put in the container.

Manage Base Profiles



If I already have my own provisioning server, why should I even consider using OBiTALK DMP for provisioning?

Once OBi devices are online and claimed to the DMP portal, there are two different sources of auto-provisioning; from ITSP and from OBiTALK. There are two identical sets of provisioning parameters in the device:

- [X_DeviceManagement.ITSPProvisioning](#). for controlling ITSP Provisioning layer
- [X_DeviceManagement.Provisioning](#). for controlling OBiTALK Provisioning layer

With this dual auto-provisioning model, OBiTALK can still be utilized in both ways:

1. Used independently as the sole system for provisioning, automatic bootstrapping and secure management of OBi devices
2. Work in conjunction with an existing provisioning system managed by the service providers

Service providers typically provide a provisioning server for their VoIP endpoints. But on the other hand, some value-added resellers or other service providers do not support their own centralized

provisioning server. If you are using your own provisioning server for your OBi endpoints, there are still many ways OBiTALK provisioning can still be a useful as a support tool:

- **Simultaneous Provisioning:** Pushing configurations to multiple devices at once using *Base Profiles*. You can also reconfigure and push the parameter values from *Base Profiles* anytime.
- **Automatic Bootstrapping:** When a customer factory resets the device accidentally and you cannot redirect provisioning back to your server, these devices will redirect back to OBiTALK provisioning so devices can automatically point back at your provisioning server URL.
- **Debug Tool:** Use as a checking tool to verify all parameters have been loaded from your provisioning server to the OBi through "Local Configuration."
- **DMP Cloud Management Advanced:** Have the ability to perform SIP ALG Test, Speed Test, remote capture of PCAP, Syslog via OBiTALK. This comes as a per device annual subscription.