



▶ Polycom® CMA™ System
Getting Started Guide

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Use of this software constitutes acceptance of the terms and conditions of the Polycom CMA system end-user license agreement (EULA).

The EULA is included in the release notes document for your version, which is available on the Polycom Support page for the Polycom CMA system.

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About This Guide

This guide provides the first-time setup information you need to install and configure a Polycom® Converged Management Application™ (CMA™) scheduling and management system. Once you've installed the standard system, see Chapter 2 of the *Polycom CMA System Operations Guide* for additional configuration and customizing tasks you can perform.

Documentation Resources

In addition to this guide, the available documentation that describes the Polycom CMA system includes:

- *Polycom CMA System Release Notes*
- *Polycom CMA System Operations Guide*
- *Polycom CMA System Web Scheduling Guide*
- *Polycom Scheduling Guide for Microsoft® Outlook®*
- *Polycom Scheduling Guide for IBM® Lotus® Notes®*

The Polycom CMA system also has online help available through the user interface.

Polycom[®] CMA[™] System Server Setup

This chapter describes the steps required to set up a Polycom[®] Converged Management Application[™] (CMA[™]) system server and connect it to the network.



If you are installing a redundant Polycom CMA system configuration, perform all of the procedures in this chapter on both system servers unless instructed otherwise.

Collect Necessary Materials

Before you install a Polycom CMA system, collect these materials:

- *Polycom CMA System Release Notes*
- Polycom CMA system server shipment
- Completed site survey or project toolkit
- Computer with a serial or ethernet port

To connect to the Polycom CMA system server through an ethernet port, make sure you also have:

- A crossover cable OR
- A hub or a switch and two ethernet cables

Complete the First-Time Setup Worksheet

Before you begin system setup, fill out the **My System Values** column of this worksheet.



In redundant system configurations, complete a **First Time Setup Worksheet** for each Polycom CMA system server.

Table 1-1 First-Time Setup Worksheet

Item	My System Value	Factory-Set Default Value	Description
System Information			
System name		POLYCOM- <7-random-ASCII- characters> For example, POLYCOM-IDT9R5W	NetBIOS name of the Polycom CMA system server. The name must be between 6 and 15 characters and can include dashes and underscores.
System IP address		192.168.1.254	Static, physical IP address for the Polycom CMA system server
System virtual IP address			For redundant Polycom CMA 5000 system configurations only
System subnet mask		255.255.255.0	Network subnet mask of the system server
IP address of the default gateway/router IP address		192.168.1.1	IP address of the gateway server
IP address of the DNS server			IP address of the domain name server
DNS Domain			This is the DNS domain name suffix, for the network in which the domain name server and Polycom CMA system server reside. For example polycom.com, not the fully qualified path of <hostname>.polycom.com.
System Time Information			
Current date			
Current time			
Time zone			
IP address of NTP time server (optional)			

Table 1-1 First-Time Setup Worksheet (continued)

Item	My System Value	Factory-Set Default Value	Description
External Database Integration (Optional)			
IP address or host name of database server			IP address of the database server
Port			Port number of the Microsoft SQL database instance
User ID and password			Credentials for database administration account with privileges to create databases and accounts.
Enterprise Directory (LDAP) Integration (Optional)			
IP address or DNS name of LDAP server			Fully qualified hostname of the LDAP server (for example, dc1.mydomain.com). The Polycom CMA system can auto-discover the LDAP server using standard Microsoft services.
Domain, user ID, and password			Credentials for read-only service account that the Polycom CMA system uses to perform LDAP queries against the Active Directory Global Catalog.
Single Sign-on Integration (Optional)			
Domain controller name			Fully qualified hostname of the domain controller for integrated Windows® authentication" (for example, dc1.mydomain.com) The Polycom CMA system can auto-discover the domain controller using standard Microsoft services.
Domain, pre-staged computer account name, and password			Credentials for pre-staged computer account used to enable communications with Active Directory. See "Pre-stage a Computer Account" on page 7.
Information Required for Polycom Customer Support			
Serial number			
License number			

Unpack and Install the Hardware Components

The Polycom CMA system uses a Polycom-branded Dell PowerEdge R610 server.

To unpack and install the hardware:

- 1 Examine the Polycom CMA system shipping container for damage.
- 2 Open and review the container packing slips.
- 3 Open the containers and examine the contents for damage.

If you find damage, file a claim with the delivery carrier. Polycom is not responsible for damage sustained during shipment of this product.

Besides this *Polycom CMA System Getting Started Guide*, the Polycom CMA system server package includes these items:

- Polycom CMA system server
 - Power cord and power cord retention brackets
 - Rack-mount kit
 - Serial cable
 - Dell PowerEdge R610 server documentation set
- 4 Unpack your system and identify each item. Keep all shipping materials in case you need them later.
 - 5 Read the “Safety Instructions” in the *Rack Installation Guide* and then use the brackets provided to install the system in the rack.
 - 6 Assemble the rails and install the system in the rack following the safety instructions and the rack installation instructions provided with your system.
 - 7 Connect the system’s power cable(s) to the system and, if a monitor is used, connect the monitor’s power cable to the monitor..
 - 8 (Optional) Attach the power cord retention bracket on the right bend of the power supply handle. Bend the system power cable into a loop and attach to the bracket’s cable clasp. Repeat the procedure for the second power supply.
 - 9 Plug the other end of the cable into a grounded electrical outlet or separate power source such as an uninterruptible power supply (UPS) or a power distribution unit (PDU).
 - 10 Press the power button on the system and the monitor. The power indicators should light.
 - 11 (Optional) Install the bezel.

Configure the Polycom CMA System Server

You can configure the Polycom CMA system server through a serial port or ethernet port connection. This section gives the two connection procedures.

To connect to the Polycom CMA system server through the serial port

- 1 Connect a computer to the Polycom CMA system server through the RS-232 serial port.
- 2 Connect the Polycom CMA system server to the network.



You **MUST** connect to a live network to enable reliable configuration of the IP address. If you do not connect to the network now, the system IP address, DNS IP address, and default gateway will show 0.0.0.0.

- 3 Power on the computer and server and access the serial console and start a Hyperterm session.
- 4 In the **Properties** dialog box, enter these values for port settings.
 - **Bits per second:** 19200
 - **Data bits:** 8
 - **Parity:** None
 - **Stop bits:** 1
 - **Flow control:** None
- 5 From the starting menu, enter **(2) System Settings**.
- 6 Enter these values from Table 1-1, [First-Time Setup Worksheet](#).
 - a Select **(1) Set DNS Server IP and Suffix** and enter the DNS server IP address and primary DNS suffix.
 - b Select **(2) Set Default Gateway IP** and enter the default gateway IP address.
 - c Select **(3) Set Hostname - IP Address - Subnet mask** to enter the system name, IP address, and subnet mask.



In redundant system configurations, enter the physical IP address for the server.

The system reboots.

- 7 Go to [Chapter 2](#), “Polycom® CMA™ System Software Setup.”

To connect to the Polycom CMA system through an ethernet port

- 1** Choose one of the following procedures:
 - Connect the Polycom CMA system server (via the GB1 port) directly to an ethernet port on a computer through a crossover cable.
 - Use ethernet cables to connect the Polycom CMA system server (via the GB1 port) and a computer to the same ethernet switch or hub.
- 2** Power on the computer and the Polycom CMA server .
- 3** Go to [Chapter 2](#), “Polycom® CMA™ System Software Setup.”

Polycom[®] CMA[™] System Software Setup

This chapter describes the Polycom[®] Converged Management Application[™] (CMA[™]) system software first-time setup tasks.



If you are installing a redundant Polycom CMA system configuration, perform all of the procedures in this chapter on both system servers unless instructed otherwise.

Pre-stage a Computer Account

To enable the **Use Single Signon** option, which allows endpoint users who are included in the Active Directory to securely log into their dynamically-managed endpoint without typing in credentials, an Active Directory administrator must first pre-stage an Active Directory computer account for the Polycom CMA system. Only one account is required for a redundant Polycom CMA system.

This procedure can be done at any time before running **First Time Setup**.

To pre-stage a computer account

- 1 On the Active Directory system, use the Microsoft **Active Directory Users and Computers** MMC snap-in to create a computer account for the Polycom CMA system. Create the computer account in any desired organizational unit (OU). The computer account object must have **Reset Password** and **Write Account Restrictions** permissions.

For more information on the **Active Directory Users and Computers** MMC snap-in, see Microsoft Technet.

- 2 From a command window on the Domain Controller, type:
`net user <computer account name>$ <Password> /domain`

Where **<computer account name>** is the name of the computer account created in step 1 on page 7, **<Password>** is the desired password, and **/domain** is literally **/domain** (i.e., do not substitute with a domain name). For more information on the **net user** command, see the Microsoft Knowledge Base.

You have now created a computer account that you can use for integrated Windows authentication.

- 3 If you are using Active Directory in Server 2000 mixed mode, edit the properties of the computer account and on the **General** tab, select **Trust computer for delegation**.

Log into the Polycom CMA System

To log into the Polycom CMA system, you need:

- An internet browser
- Adobe® Flash® Player 9.0 or 10.0
- A completed first-time setup worksheet. See [Table 1-1](#) on page 2.



The Polycom CMA system user interface is best viewed with an SXGA display resolution of at least 1280x1024 pixels. The minimum support display resolution is XGA 1024x768 pixels.

To log into the Polycom CMA system

- 1 Open a browser window and in the **Address** field enter the Polycom CMA system server IP address.
 - If prompted to install the Adobe Flash Player, click **OK** and follow the instructions provided by the installation wizard.
 - If you receive a **Security Alert**, click **Yes**.
- 2 When the Polycom CMA system login screen appears, if necessary select a different **Language**.
- 3 Enter the administrator **Username** and **Password**. The factory default is **admin/admin**.
- 4 Click **Login**.

The Polycom CMA system user interface appears. If the system has not been configured, the first-time setup wizard appears.

First-time Setup Wizard

When you log into a Polycom CMA system that has not been configured, the first-time setup wizard automatically steps you through a series of ordered configuration pages. You cannot use the system until you've completed the steps in the first-time setup wizard.

Note that changing configuration settings on some pages of the first-time setup wizard, such as the **System Information** and **Database** pages, will cause the system to reboot. When you log into a system after one of these reboots, the next page in the ordered configuration pages appears.

To step through the first-time setup wizard

EULA License Agreement

- 1 Log into the Polycom CMA system.
- 2 Read the license agreement and click **Accept** to accept the terms and continue.

Administrator Password

- 3 When the **Change Administrator Password** page appears, enter the **Old Password**.
- 4 For the **New Password**, enter a new password with a length of at least eight characters.
- 5 **Confirm the New Password** and click **Next**.

The **Network** page appears and the fields contain the network information entered previously.



If you are using the direct ethernet configuration method, you must enter the information you recorded in [Table 1-1](#) on page 2.

System Identification

- 6 Verify that the network information is correct and click **Next**.
- 7 If you used the direct ethernet configuration method, connect the Polycom CMA system server to the production network.
- 8 As needed, wait 5 minutes for the system to completely reboot and then log into the Polycom CMA system again.

System Time

- 9 Configure these settings on the **System Time** page, as necessary.

Field	Description
System Time Zone	The time zone in which the Polycom CMA server resides.
Auto adjust for Daylight Saving?	Select this checkbox to adjust the clock automatically for daylight savings time.

Field	Description
Use Current Time	Select this checkbox to input the current date and time.
Current Date	The system date for the Polycom CMA system.
Current Time	The system time for the Polycom CMA system.
Use External NTP Server Time Synchronization	(Recommended) Select this checkbox to synchronize the Polycom CMA system date and time with an external NTP server.
IP address or DNS resolved names	The IP address or fully qualified domain name (ASCII only) of the NTP server.
Minutes between synchronization attempts	Input how often the Polycom CMA system should synchronize with the NTP server. The default is 60 minutes.



If you set the system to use an external NTP server without first setting the current date and time, the system time may be wrong until the system's first synchronization.

10 Click Next.

Database Configuration

The **Database** page appears. By default, the Polycom CMA system internal database is used.

Integration with an external Microsoft SQL Server database is required for redundant Polycom CMA 5000 systems or for Polycom CMA 5000 systems supporting more than 400 concurrently registered endpoints and 240 concurrent calls. However, for ease of setup, you may wish to leave the system pointed to its internal database and integrate with the external database later.



If you are installing a redundant Polycom CMA 5000 system configuration, *leave both servers configured to use the internal database*. You will point them to an external database later when you perform the redundancy configuration tasks in Chapter 2 of the *Polycom CMA System Operation Guide*.

11 To continue to use the default internal database for **First Time Setup** purposes, click **Next** and skip to **LDAP Configuration** on [page 11](#). You can set up the external database after you've finished **First Time Setup**.

12 To use an external Microsoft SQL database server:

- a** Verify that your Microsoft SQL Server meets the Polycom CMA system requirements. Refer to the *Polycom CMA System Release Notes*.
- b** Select the **Use an external SQL Server database** check box.

- c** Enter the **Database Server IP Address** and change the database port number as needed.
- d** Click **Next**.
The **Database Maintenance** dialog box appears.
- e** As needed, enter the User ID and Password for the Microsoft SQL server.
 - » If you use Microsoft Windows authentication, be sure the login ID has administrator privileges on the SQL server.
 - » If you use Microsoft SQL authentication, be sure the login ID is a member of the `sysadmin` role.
- f** Click **Reformat/Install Database**.
The system connects to the server and installs the databases.
- g** When the installation is complete, click **Close**.
The system reboots.
- h** Wait 5 minutes and when the system completely reboots, log into the Polycom CMA system again.

LDAP Configuration

The **LDAP** page appears. By default, the Polycom CMA system accesses an internal user database.

- 13** To continue using the local directory for **First Time Setup** purposes, skip to **“Directory Configuration”** on page 13. You can set up the integration with an enterprise Active Directory after you’ve finished **First Time Setup**.
- 14** To integrate the Polycom CMA system with an enterprise Active Directory server so that users can include enterprise groups, users, and rooms in their conferences:
 - a** On the **LDAP** page, select **Integrate with LDAP server**.
 - b** To have the system auto-discover the LDAP server by querying the DNS, enable **Auto-discover** in the **Integrate with LDAP server** section; otherwise, enter the **LDAP IP Address** or **DNS Name**.
 - c** As needed, configure these settings on the **LDAP** page.

Setting	Description
Domain\LDAP User ID	<p>Domain and LDAP User ID for an account that the Polycom CMA system can use to access the LDAP server and retrieve group, user, and room information.</p> <p>This LDAP User ID must have read permissions so it can search the entire forest on the LDAP server.</p> <p>This LDAP User ID is automatically associated with the Polycom CMA system administrator role.</p>

Setting	Description
LDAP User Password	The password for the LDAP user account
Security Level	<p>The level of security on the connection between the Polycom CMA system and the Active Directory server. Possible values include:</p> <ul style="list-style-type: none"> • Plain—No security on the connection • LDAPS—The connection is secured over outbound port 3269 using LDAP-S in a manner similar to https. If the “Domain Controller: LDAP Server signing requirements” setting on the Active Directory server is set to “Require Signing”, then you must use LDAPS to secure the connection. • StartTLS—The connection is secured over outbound port 3268 (the same port as Plain), but it then negotiates security once the socket is opened. Some LDAP servers reject any unsecured transactions, so the first command is the StartTLS negotiation command.
Ignore Disabled AD users	Enable this option to have the Polycom CMA system ignore disabled enterprise users. Do not enable this option if your enterprise conference rooms are set up as disabled enterprise users.
LDAP Exclusion Filter	<p>If necessary and you understand LDAP filter syntax, specify other types of user accounts to exclude. Don't edit these expressions unless you understand LDAP filter syntax.</p> <p>For more information, see “Understanding Exclusion Filters” in the <i>Polycom CMA System Operations Guide</i>.</p>
LDAP Search BaseDN	<p>If necessary and you understand LDAP filter syntax, specify the top level of the LDAP directory tree (referred to as the base DN) to search. Don't edit these expressions unless you understand LDAP filter syntax.</p> <p>For more information, see “Understanding Base DN” in the <i>Polycom CMA System Operations Guide</i>.</p>

Single Sign-on

15 To integrate the Polycom CMA system with an Active Directory domain controller for single sign-on authentication:

- a** On the **LDAP** page, select **Use Single Sign-on (Integrated Windows Authentication)**.

The Polycom CMA system can auto-discover the closest logical domain controller and Active Directory servers, but to do this the network DNS server must have a DNS SRV record for these servers

Directory Configuration

- b** If your network DNS server has a DNS SRV record for the domain controller, in the **Domain controller name** section enable **Auto-discover**; otherwise, enter the fully qualified hostname of the domain controller (for example, `dc1.mydomain.com`). The pre-staged computer account must be within this domain as well.
- c** In the **Computer Account Credentials** section, enter the **Domain\Comuter Name** and **Password** for the pre-staged computer account created in step 1 on page 7.

16 Click Next.

The Polycom CMA system **Directory Setup** page appears.

17 On the **Directory Setup** page:

- a** To exclude users with dynamically-managed devices from the Global Address Book, clear the **Include dynamically-managed devices in the Global Address Book** option.
- b** To exclude guestbook entries from the enterprise directory, clear the **Show Guestbook Entries in the Directory** option.

18 Click Next.

The Polycom CMA system displays the message that you have completed first time setup. You have the option of logging out of the application or goint to the application **Dashboard**.

Complete the Setup

Once you've finished **First Time Setup**, you may need to perform these configuration tasks:

- Using the Microsoft SQL Server Configuration Manager, change the SQL Server keep alive checks (typically, **SQL Server 2005 Network Configuration > Protocols for MSSQLSERVER > TCP/IP > KeepAlive**) to 3,600,000 milliseconds.
- If you're installing redundant Polycom CMA 5000 system servers, complete the procedures for configuring redundancy. This includes setting up the external database, entering the virtual IP address, and testing failover.
- As needed, integrate the Polycom CMA system with an external Microsoft SQL database.
- As needed, integrate the Polycom CMA system with a Microsoft Active Directory enterprise directory.
- Add licenses to your system.
- Set up users, rooms, and devices.
- Associate devices with users and rooms.

- Schedule a test conference.
- Set up client computers with Microsoft Internet Explorer and the Polycom CMA Desktop application, as required.
- Download and distribute the Polycom Scheduling Plugins for Microsoft® Outlook® and/or IBM® Lotus® Notes®.

For more information on these tasks, refer to the *Polycom CMA System Operation Guide*.

Regulatory Notices

Regulatory Notices

USA Regulatory Notices

Part 15 FCC Rules

This device is compliant with Part 15 of the FCC Rules. Operation is subject to the following two conditions:

- 1 This device may not cause harmful interference, and
- 2 This device must accept any interferences received, including interference that may cause undesired operation.

Class A Digital Device or Peripheral

NOTE: This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instruction manual, may cause harmful interference to radio communications. Operation of this equipment in a residential area is likely to cause harmful interference in which case the user will be required to correct the interference at his own expense.

In accordance with part 15 of the FCC rules, the user is cautioned that any changes or modifications not expressly approved by Polycom Inc. could void the user's authority to operate the equipment.

We recommend that you install an AC surge arrestor in the AC outlet to which this device is connected. This action will help to avoid damage to the equipment caused by local lightning strikes and other electrical surges.

EEA Regulatory Notices

This Polycom CMA system has been marked with the CE mark. This mark indicates compliance with EEC Directives 2006/95/EC and 2004/108/EC. A full copy of the Declaration of Conformity can be obtained from Polycom Ltd, 270 Bath Road, Slough, Berkshire, SL1 4DX, UK.

Canadian Regulatory Notices

Class A Digital Device

This Class [A] digital apparatus complies with Canadian ICES-003.

Cet appareil numérique de la classe [A] est conforme à la norme NMB-003 du Canada.

Regulatory Notices**South Korean Regulatory Notices**A급 기기 (업무용 정보통신기기)

이 기기는 업무용으로 전자파적합등록을 한 기기이오니 판매자 또는 사용자는 이 점을 주의 하시기 바라며, 만약 잘못판매 또는 구입하였을 때에는 가정용으로 교환하시기 바랍니다.

Czech Republic Regulatory Notices

This device belongs to Class B devices as described in EN 55022, unless it is specifically stated that it is a Class A device on the specification label. The following applies to devices in Class A of EN 55022 (radius of protection up to 30 meters). The user of the device is obliged to take all steps necessary to remove sources of interference to telecommunication or other devices.

Pokud není na typovém štítku počítače uvedeno, že spadá do třídy A podle EN 55022, spadá automaticky do třídy B podle EN 55022. Pro zařízení zařazená do třídy A (ochranné pásmo 30m) podle EN 55022 platí následující. Dojde-li k rušení telekomunikačních nebo jiných zařízení, je uživatel povinen provést taková opatření, aby rušení odstranil.

Russian Compliance

Polycom CMA 4000 System

Ministry of Information Technologies & Communication of the Russian Federation - Declaration of Conformity. DoC #СПД-3494. Expiry 15/03/2013.

Polycom CMA 5000 System

Ministry of Information Technologies & Communication of the Russian Federation - Declaration of Conformity. DoC #СПД-3495. Expiry 15/03/2013.

Worldwide Regulatory Notices**Warning**

This is a Class A product. In a domestic environment, this product may cause radio interference in which case the user may be required to take adequate measures.

Plugs Acts as Disconnect Device

The socket outlet to which this apparatus is connected must be installed near the equipment and must always be readily accessible.

La prise électrique à laquelle l'appareil est branché doit être installée près de l'équipement et doit toujours être facilement accessible.

Installation Instructions

Installation must be performed in accordance with all relevant national wiring rules.

L'Installation doit être exécutée conformément à tous les règlements nationaux applicable au filage électrique.