



Migration Guide

| October 2013 | 3725-73003-001A1

# **Polycom CMA 4000 System to RealPresence Video DualManager 400 System**



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## About This Guide

This Migration Guide is for those Polycom® CMA® 4000™ system users who intend to migrate their existing Polycom CMA 4000 system to a Polycom RealPresence® Video Dual Manager 400 system.

## About the Migration Kits

As part of the migration, you will have received a Migration DVD Kit and a Migration Hard Drive Kit. The Migration DVD Kit contains the software DVD and licenses needed to migrate your Polycom CMA system. The Migration Hard Drive Kit contains a blank hard drive for use in the system server. Use these kits together, along with the instructions in this guide, to complete migration.

## About Polycom RealPresence Video DualManager 400

The Polycom RealPresence Video DualManager 400 system combines the RealPresence Resource Manager® system and the Polycom DMA® 7000™ system into a single, convenient appliance. The RealPresence Resource Manager system and the DMA system components are implemented as a Hypervisor and two virtual machines (VMs) on a RealPresence Video DualManager 400 system, allowing you to access each application via its own IP address on a single network interface. This guide addresses each application of the RealPresence Video DualManager 400 system individually when appropriate, using the following naming conventions:

- DMA system
- RealPresence Resource Manager system

## Before You Begin

We strongly recommend that you read this guide before beginning migration. There is significant manual interaction that you will need to perform to complete the migration process, and much of this configuration will be needed in order for the migrated system to function properly in a production environment.

Refer to the “Known Issues” section of the *Polycom RealPresence Resource Manager System Release Notes* for the latest release of the product before beginning migration, as this information may be helpful.

You can use the *CMA 4000 Migration Training Video* to supplement this guide. This video outlines the migration process and provides details on use of the system once migration is complete. The video is available from the Polycom support page at <http://support.polycom.com>.

# Preparing to Migrate a System

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Before you begin migration, you will need to gather some required items and perform certain tasks so that migration can proceed smoothly. This section contains the following topics:

- [Collect the Necessary Materials](#) on page 6
- [Assumptions](#) on page 7
- [Complete the First Time Setup Worksheets](#) on page 7
- [Back Up Existing Polycom CMA System Data](#) on page 13
- [Set up DNS Host and Service Records](#) on page 13
- [Upgrade the CMA System to a Compatible Version](#) on page 14

## Collect the Necessary Materials

Before you migrate, collect these materials:

- *Polycom CMA System Operations Guide* for the version of software your CMA system is running (available from <http://support.polycom.com>)
- *Polycom Resource Manager System Operations Guide* (available from <http://support.polycom.com>)
- *Polycom DMA 7000 System Operations Guide* (available from <http://support.polycom.com>)
- Completed First-Time Setup Worksheets
- RealPresence Video DualManager 400 system software DVD (provided in the Migration DVD kit)
- Hard drive with a capacity of at least **146GB** (provided in the Migration Hard Drive kit)
- Keyboard and VGA Monitor
- Ethernet crossover cable
- PC running Microsoft® Windows® (XP Pro, Vista, or Windows 7) with:
  - 1280x1024 (SXGA) minimum display resolution; 1680x1050 (WSXGA+) or greater recommended
  - Ethernet port
  - Java™ 1.6 or newer
  - Microsoft Internet Explorer® 7 or newer
  - Adobe® Flash® Player



The system's Flex-based management interfaces require Microsoft Internet Explorer and Adobe Flash Player. For stability and security reasons, we recommend always using the latest version of Flash Player.

If a different web browser is used during the migration process, you may encounter an error with the Flex-based management interface when downloading or uploading files.

## Assumptions

This document is written for a technical audience. You will be configuring hard drives, installing software, and configuring system networking. This guide assumes that you are familiar with the following:

- Basic computer and network system administration skills
- Physical cabling of PCs and servers
- Network configuration, including IP addressing, subnets, gateways, domains, DNS, time servers, and possibly network routing
- The current configuration of the existing CMA system

This guide also assumes that you already have a Polycom DMA<sup>®</sup> 7000<sup>™</sup> system running in your environment, or will be configuring one soon after migration.

If necessary, obtain the assistance of the appropriate IT or network administration personnel before proceeding.

## Complete the First Time Setup Worksheets

Before you begin the migration process, fill out the My System Values column of the worksheets for the RealPresence Resource Manager system and DMA system.

### RealPresence Resource Manager System First Time Setup Worksheet

Configuration Information	My System Values	Factory-Set Values	Description
<b>System Network Settings (from Admin &gt; Server Settings &gt; Network)</b>			
System Name		PLCM_RPRM	System name of the RealPresence Resource Manager system. Can be up to 32 characters long; dashes and underscores are valid characters.
DSCP Marker			Allows the administrator to configure the Quality of Service level of the RealPresence Resource Manager system. Set the level between 0 - 63.
IPv6 Address			IPv6 global address
IPv6 Default Gateway			The IPv6 address of the gateway server/router. For IPv6 networks only.

Configuration Information	My System Values	Factory-Set Values	Description
IPv6 Link Local Address			Read-only field. The RealPresence Resource Manager system generates a value for this field when IPv6 is enabled.
IPv4 Address			Static IP address for the RealPresence Resource Manager system on an IPv4 network. 192.168.1.254 is the default value that needs to be changed according to your own network. We recommend keeping the IP address the same as the CMA system IP address to simplify the migration process.
IPv4 Subnet Mask			Network subnet mask of the RealPresence Resource Manager system. For IPv4 networks only.
IPv4 Default Gateway			IP address of the gateway server/router. For IPv4 networks only. 192.168.1.1 is the default value. You need to change this to match the gateway IP for your network.
DNS Domain			This is the DNS domain name suffix for the network in which the domain name server and the system server reside. For example polycom.com, not the fully qualified path of <hostname>.polycom.com.
Preferred DNS Server			IP address of the domain name server.
Alternate DNS Server			IP address of an alternate domain name server. Must be in the same IP address format as the preferred DNS server.
Enable 802.1.x		Disabled	Enable 802.1.x if your network requires this type of authentication.
User Name			The user name for the 802.1.x account.
Password			The password for the 802.1.x account.
Confirm Password			Confirm the password for the 802.1 x account.
Key Management Protocol			Select the appropriate Key Management Protocol for your environment.
EAP Method			Select the appropriate EAP Method for your environment.
Phase2 Protocol			Select the appropriate Phase2 Protocol for your environment.



Configuration Information	My System Values	Factory-Set Values	Description
<b>System Time Information (from Admin &gt; Server Settings &gt; System Time)</b>			
System Time Zone			
Current Date			
Current Time			
External NTP Server			IP address of external NTP time server (optional).

## DMA 7000 System First Time Setup Worksheet

Configuration Information	My System Values	Description
System IP type		Specify whether the DMA 7000 system should support IPv4, IPv6, or both. If both, complete all the IP address information below. If only IPv4 or IPv6, complete only the corresponding fields below.
System server configuration	1 server configuration	RealPresence Video DualManager 400 systems <b>must</b> be single-server systems.
System split network setting	Combined network interfaces	RealPresence Video DualManager 400 systems <b>must</b> combine the system's management and signaling interfaces.
<b>Server 1</b>		Only the Server 1 settings are used for the RealPresence Video DualManager 400 system.
Management host name		Local host name of the DMA 7000 system application. The host name may contain only letters, numbers, and internal dashes (hyphens), and may not include a domain. The reserved values appserv* and dmamgk-* may not be used for host names. The host name is combined with the domain name specified under <b>General System Network Settings</b> to form the fully qualified domain name (FQDN).
Management IPv4		Static, physical IP address for the component's combined interface.
Management IPv6		
Signaling IPv4		These settings are not used.
Signaling IPv6		

Configuration Information	My System Values	Description
<b>Server 2</b>		These settings are not used.
<b>Shared Management Network Settings</b>		In the combined network configuration required for RealPresence Video DualManager 400 systems, these settings are used for both management and signaling.
Virtual management host name		Not used for a RealPresence Video DualManager 400 deployment with IPv4 enabled. The host name may contain only letters, numbers, and internal dashes (hyphens), and may not include a domain. The reserved values appserv* and dmamgk-* may not be used for host names. The host name is combined with the domain name specified under <b>General System Network Settings</b> to form the fully qualified domain name (FQDN).
Virtual management IPv4		These settings are not used.
Virtual management IPv6		
Subnet mask		IPv4 network mask that defines the subnetwork of the application's management interface.
IPv6 prefix length		IPv6 CIDR (Classless Inter-Domain Routing) prefix size value (the number of leading 1 bits in the routing prefix mask) that defines the subnetwork of the application's management interface.
IPv4 gateway		IP address of the gateway server used to route network traffic outside the subnet.
Auto-negotiation		Yes or no. If no, indicate speed and full or half duplex. <b>Note:</b> Auto-negotiation is required if your network is 1000Base-T.
<b>Lan Security Settings</b>		
<i>Enable 802.1x</i>		These settings are not used. Do <b>not</b> select <b>Enable 802.1x</b> .
<b>Shared Signaling Network Settings</b>		These settings are not used.
<b>General System Network Settings</b>		
DNS search domains		Space- or comma-separated list of fully qualified domain names to query on the DNS servers to resolve host names (optional). The system domain is added automatically; you don't need to enter it.

Configuration Information	My System Values	Description
DNS 1		IP address of the primary Domain Name System server. At least one DNS server is required. Your DMA 7000 system application must be accessible by its host name, not just its IP address, so you (or your DNS administrator) must create A (address) resource records (RRs) for IPv4 and/or AAAA records for IPv6 on your DNS server(s). A/AAAA records that map the IP address to the host name are mandatory.
DNS 2		IP address of a second DNS server (optional, but recommended).
DNS 3		IP address of a third DNS server (optional).
Domain		The domain for the system. This is combined with the host name to form the fully qualified domain name (FQDN). For instance: Host name: <i>vdm-dma1</i> Domain: <i>video.example.com</i> FQDN: <i>vdm-dma1.video.example.com</i>
Signaling DSCP		The Differentiated Services Code Point value (0 - 63) to put in the DS field of IP packet headers on outbound packets associated with signaling traffic. The DSCP value is used to classify packets for quality of service (QoS) purposes. If you're not sure what value to use, leave the default of 0.
Management DSCP		The Differentiated Services Code Point value (0 - 63) to put in the DS field of IP packet headers on outbound packets associated with management traffic. The DSCP value is used to classify packets for quality of service (QoS) purposes. If you're not sure what value to use, leave the default of 0.
Default IPv6 gateway		The IPv6 gateway's address and the interface used to access it, generally eth0, specified as: <IPv6_address>%eth0
Default IPv4 gateway		This setting is not used.
<b>System Time Settings</b>		

Configuration Information	My System Values	Description
Time zone		Time zone in which the system is located. We strongly recommend selecting the time zone of a specific geographic location (such as America/Denver), not one of the generic GMT offsets (such as GMT+7). If you really want to use a generic GMT offset (for instance, to prevent automatic daylight saving time adjustments), note that they use the Linux/Posix convention of specifying how many hours ahead of or behind local time GMT is. Thus, the generic equivalent of America/Denver (UTC-07:00) is GMT+07, not GMT-07.
NTP server #1		IP address of the primary NTP time server. Use of time servers is strongly recommended. All the devices in your video conferencing deployment should use the same time servers to avoid potential problems caused by time differences among devices.
NTP server #2		IP address of a second NTP time server (optional, but strongly recommended).
NTP server #3		IP address of a third NTP time server (optional, but strongly recommended).
<b>Routing Configuration</b>		Special routing rules are generally not needed in the combined network configuration required in RealPresence Video DualManager 400 systems; the operating system's underlying routing configuration is generally sufficient. If you aren't sure, consult the appropriate IT staff or network administrator for your organization.
Destination host/network		The IP address of the destination network host or segment.
Prefix length		The CIDR (Classless Inter-Domain Routing) value that, together with the destination host/network address, defines the subnet for this route. For IPv4, a prefix length of 24 is equivalent to specifying a subnet mask of 255.255.255.0. A prefix length of 16 is equivalent to specifying a subnet mask of 255.255.0.0.
Interface		Specify the interface for this route. In the combined network configuration required in RealPresence Video DualManager 400 systems, this is eth0.
Via		IP address of router for this route. Optional and only needed for non-default routers.

## Back Up Existing Polycom CMA System Data

We strongly recommend backing up the existing CMA system configuration and databases before migration. For more information and instructions on taking system backups, refer to the *Polycom CMA System Operations Guide* for your version of system software.

## Set up DNS Host and Service Records

Your Polycom DMA system must be accessible by its host name, not just its IP address, so you (or your DNS administrator) must create A (address) resource records (RRs) for IPv4 on your DNS server. Refer to Chapter 2 the *Polycom DMA 7000 System Operations Guide* for more information.

Before migrating your system, you should configure your DNS servers to:

- Resolve queries for the RealPresence Resource Manager system and DMA system by host name.
- Resolve reverse lookup queries for the RealPresence Resource Manager system and DMA system.
- Identify the RealPresence Resource Manager system and DMA system services on the network.

### DNS Host Records

You (or your DNS administrator) must create IPv4 A (address) resource records (RRs) on your DNS server(s). A records that map each physical host name to the corresponding physical IP address are mandatory. The DNS server(s) should also have entries for your Active Directory server, mail server, and gatekeeper. To allow your DNS servers to resolve queries for the systems by reverse lookup, you must also enter a DNS pointer (PTR) record in your DNS file.

### Additional DNS Records for the DMA System

You may need to create additional DNS records as described below.

#### Additional DNS Records for SIP Proxy

To support the use of your Polycom DMA system as a SIP proxy server and ease future network administrative burdens, create the following DNS records:

- (Optional) NAPTR records that describe the transport protocols supported by the SIP proxies at a domain and identify the preferred protocol. Configure these statically to match the system's SIP transport protocol configuration.
- SRV records for each transport protocol that identify the host name of the SIP proxy that services a particular domain. Configure these statically to point to the host name of the Call Server in the domain. Here are example records for a system:

```
_sips._tcp.example.com. 86400 IN SRV 10 1001 5061 dma-asia.example.com.  
_sip._tcp.example.com. 86400 IN SRV 20 1001 5060 dma-asia.example.com.  
_sip._udp.example.com. 86400 IN SRV 30 1001 5060 dma-asia.example.com.
```

To enable access from the public internet, create corresponding SRV records, visible from outside the firewall, for the public address of each SIP session border controller (SBC).

## Additional DNS Records for H.323 Gatekeeper

To support the use of your Polycom DMA system as an H.323 gatekeeper and ease future network administrative burdens, create SRV records that identify the host name of the gatekeeper that services the domain. These records are necessary in order to enable the optional inbound URL dialing feature. Configure them statically to point to the host name of the Call Server in the domain. Here are example SRV records for a system:

```
_h323ls._udp.example.com. 86400 IN SRV 0 1 1719 dma-asia.example.com.
_h323cs._tcp.example.com. 86400 IN SRV 0 1 1720 dma-asia.example.com.
```

## Upgrade the CMA System to a Compatible Version

The migration process requires the installation of a Migration Patch that allows you to save the existing database and configuration data in a format that can be imported by the RealPresence Resource Manager system. The following table lists supported migration paths.

CMA System version	Intermediate upgrade	Intermediate upgrade	Final upgrade before migration
5.3.0 or 5.4.0	→ 5.5.0	→ 5.5.0 Patch 5	→ 5.5.0 Migration Patch
5.5.0 (through Patch 4)	→ 5.5.0 Patch 5		→ 5.5.0 Migration Patch
5.5.0 Patch 5			→ 5.5.0 Migration Patch
5.5.0 Patch 6	→ 5.5.0 Patch 7		→ 5.5.0 Migration Patch
5.5.0 Patch 7			→ 5.5.0 Migration Patch
6.0	→ 6.2.0		→ 6.2.x Migration Patch
6.0.x	→ 6.2.0		→ 6.2.x Migration Patch
6.2.x			→ 6.2.x Migration Patch

If you need to upgrade before migration, see the *Polycom CMA System Release Notes* located on [support.polycom.com](http://support.polycom.com) for each intermediate upgrade you must perform. For details on installing the Migration Patch, refer to [Creating a Migration Archive](#) on page 15.



You **MUST** disconnect your CMA system from the network before beginning the migration process. Do not attempt to migrate a networked CMA system.

# Creating a Migration Archive

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In order to archive existing CMA system configuration data for migration, you need to install a Migration Patch on the CMA system and use it to archive the data as directed below. The Migration Patch stores important system configuration and data in a format that can be read by the RealPresence Resource manager system.

Please note that the migration archive does not take the place of a system backup; you can only restore the migration archive to a RealPresence Resource Manager system. This chapter provides details on installing and using the Migration Patch, and includes these topics:

- [Data That Is Not Captured in the Migration Archive](#) on page 15
- [Prepare CMA 5.5.x System Data for Migration](#) on page 16
- [Prepare CMA 6.2.x System Data for Migration](#) on page 18

## Data That Is Not Captured in the Migration Archive

It is important to note that the migration process does not save all configuration settings and data from the CMA system. The following are items that are not migrated automatically as part of this process and must be configured manually after migration and data restoration:

- System certificates
- Unsupported RealPresence endpoints
- Endpoint software update packages
- Scheduled software updates
- System Log and Audit Log files
- Dial rule information

### System Certificates

After restoring the migrated CMA system data to the RealPresence Resource Manager system, you will need to regenerate the system's default self-signed certificate and any certificates signed by a Certificate Authority (CA). You will also need to create any CA certificates needed for the DMA system.

### Unsupported RealPresence Endpoints

After migration, the RealPresence Resource Manager system removes some endpoints from the system if they were used on a version of CMA system software that did not officially support them. Any associated E.164 or H.323 aliases and scheduled conferences involving this endpoint are removed as well. Removal follows the following guidelines:

<b>CMA system version with which endpoint first used</b>	<b>Type of endpoint removed</b>	<b>Associated data removed with this endpoint</b>
6.2.0 or greater	None	None
6.0.x	Group Series RealPresence Desktop	E.164 aliases,H.323 aliases, and scheduled conferences
Lower than 6.0.1	Group Series RealPresence Desktop RealPresence Mobile	E.164 aliases,H.323 aliases, and scheduled conferences

The migration process saves the endpoint, conference, and alias information in the following files, which you can download from the RealPresence Resource Manager system after migration is complete:

- Migration-Deleted\_Device.csv
- Migration-Deleted\_Alias.csv
- Migration-Deleted\_Conference.csv

For information on recovering this data after migration, refer to [Post Migration Tasks](#) on page 30.

## Endpoint Software Update Packages

Any endpoint software update packages that you have uploaded to the CMA system will not be transferred with the migration. After migration is complete, you will need to upload these packages again.

## Scheduled Software Updates

Endpoint Software updates that are currently scheduled on the CMA system will be lost during migration; you will need to reschedule these events after migration.

## System Log and Audit Log Files

In order to minimize the size of the migration archive file, system logs and audit logs are not transferred during migration. If you need to preserve CMA system or audit log files, download and save these files before beginning the migration process.

## Dial Rule Information

The CMA system dial rules are not saved as part of the migration archive, but are instead captured in separate files that you can save before migration. These files are detailed in this chapter during the migration archive download procedures.

## Prepare CMA 5.5.x System Data for Migration

This section describes the steps required to install the CMA system Migration Patch on a CMA 4000 system running version 5.5.x software and use it to archive settings and data for migration.



## Download and Install the CMA System 5.5.0 Migration Patch

The CMA system 5.5.0 Migration Patch allows you to save certain configuration and settings from the CMA system in preparation for migration. You can install it as you would any upgrade for the CMA system, and the patch will write an entry into the CMA system upgrade history. The patch installation process adds the menu item **Admin > Backup System Settings**, which you can use to create a migration archive that can be restored after migration.

### To download and install the CMA system 5.5.0 Migration Patch

- 1 Download the CMA system 5.5.0 Migration Patch and save it to your hard drive.  
The patch is available from the Polycom support page for the Polycom RealPresence Video DualManager 400 system at <http://support.polycom.com>.
- 2 In the CMA system web interface, go to **Admin > Management and Security > Server Software Upgrade**.
- 3 Click **Upload Upgrade File to Server**. Use the file dialog to browse to the Migration Patch.
- 4 Click **OK** to upload the patch.
- 5 Click **Upgrade** to begin the patch installation. The installation stops services and copies the required files.  
When the installation process is complete, the CMA system reboots.
- 6 Clear your web browser's cache. Refer to your web browser's documentation for instructions.  
This helps to ensure the web interface menu areas added by the Migration Patch are displayed correctly.
- 7 When the reboot is complete, log in to the CMA system.
- 8 Go to **Admin > Management and Security > Server Software Upgrade**.
- 9 Verify the patch installation by ensuring it is listed in the **Past Upgrades** section.

## Create and Download the Migration Archive and Dial Rule Data

After installing the patch, you will need to manually create a migration archive using the menu item the patch has created. If the CMA system dial rules have been customized, you can also choose to save the dial rule configuration. To do this, follow the optional procedure on [page 18](#).

### To create and download a migration archive

- 1 Go to **Admin > Backup System Settings**.
- 2 Click **Create and Download a Backup Archive for Migration to 8.0**.  
The system displays a progress bar, and then prompts you to continue.
- 3 Click **Yes**.
- 4 Use the file dialog to browse to a location and save the archive file to your hard drive.  
This file, named **archive<xxxxx>.zip**, is the file you will use to restore CMA system settings to the RealPresence Resource Manager system.
- 5 Click **OK** after the download is complete.

**(Optional) To download the CMA system dial rule data**

- 1 Go to **Reports > System Log Files**.
- 2 In the file list, click to highlight one of the files referenced in Table below.
- 3 Click **Save**.  
A file dialog appears.
- 4 Use the file dialog to browse to a location and save the archive file to your hard drive.
- 5 Repeat steps 2 through 4 for the remaining files in the table below:

**CMA System Version 5.5.x Dial Rule Information**

File Name	Description
AlternateGatekeeper.csv	Contains exported data from the database table <b>AlternateGK</b> .
DialRule.csv	Contains exported data from the database table <b>DR_DialRule</b> .
DialRuleAssociations.csv	Contains exported data from the database table <b>DR_Service</b> .
PrimaryGatekeeper.csv	Contains exported data from the database table <b>GKConfig</b> .
NeighboringGatekeepers.csv	Contains exported data from the database table <b>ST_Gatekeeper</b> .



On a version 5.5.x CMA system, the .CSV files created above will be overwritten during the next nightly automatic system backup.

**Prepare CMA 6.2.x System Data for Migration**

This section describes the procedure to install the CMA system 6.2.x Migration Patch on a version 6.2.x CMA 4000 system, and use it to prepare the CMA system settings and data for migration.

**Download and Install the CMA System 6.2.x Migration Patch****To download and install the CMA system 6.2.x Migration Patch**

- 1 Download the CMA 6.2.x system Migration Patch and save it to your hard drive.  
The patch is available from the Polycom support page for the Polycom RealPresence Video DualManager 400 system at <http://support.polycom.com>.
- 2 In the CMA system web interface, go to **Admin > Management and Security > Server Software Upgrade**.
- 3 Click **Upload Upgrade File to Server**. Use the file dialog to browse to the Migration Patch.
- 4 Click **OK** to upload the patch.
- 5 Click **Upgrade** to begin the installation. Installation progress is displayed in the web browser.  
The installation process automatically creates a migration archive, available for download from the **System Log Files** area. When finished, the system displays the message "**Patch completed**".

- 6 Clear your web browser's cache. Refer to your web browser's documentation for instructions. This helps to ensure the web interface menu areas added by the Migration Patch are displayed correctly.
- 7 Browse to the CMA system server IP address.
- 8 Log in to the CMA system as an Administrator.

## Download the Migration Archive and Dial Rule Data

The patch installation process has automatically created the migration archive, and you can now download the archive from the **System Log Files** area. If the CMA system dial rules have been customized, you can follow the optional procedure above Table 1 to save the dial rule configuration data.

### To download the migration archive

- 1 In the CMA system interface, go to **Reports > System Log Files**.
- 2 In the file list, click to highlight the migration archive, named **archive<xxxxx>.zip**.  
This is the file you will use to restore CMA system settings to the RealPresence Resource Manager system.
- 3 Click **Open**.  
A file dialog appears.
- 4 Use the file dialog to browse to a location and save the archive file to your hard drive.

### (Optional) To download the CMA system dial rule data

- 1 Go to **Reports > System Log Files**.
- 2 In the file list, click to highlight one of the files referenced in Table 1 below.
- 3 Click **Open**.  
A file dialog appears.
- 4 Use the file dialog to browse to a location and save the archive file to your hard drive.
- 5 Repeat steps 2 through 4 for the remaining files in the table below:

**Table 1: CMA System Version 6.x Dial Rule Information**

File Name	Description
AlternateGatekeeper.csv	Contains exported data from the database table <b>AlternateGK</b> .
DialRule.csv	Contains exported data from the database table <b>DR_DialRule</b> .
DialRuleAssociations.csv	Contains exported data from the database table <b>DR_Service</b> .
PrimaryGatekeeper.csv	Contains exported data from the database table <b>GKConfig</b> .
NeighboringGatekeepers.csv	Contains exported data from the database table <b>ST_Gatekeeper</b> .



On a version 6.x CMA system, the CSV files created above will be overwritten during the next manual system backup. They are not overwritten during nightly automatic backups.

# Installing and Migrating a System

---

This chapter describes how you can use the CMA Migration Kits to migrate a system and restore any archived data from the CMA system to the RealPresence Video DualManager 400 system. It includes these topics:

- [Install the Blank Hard Drive and System Software](#) on page 21
- [RealPresence Resource Manager System Setup-Part 1](#) on page 23
- [RealPresence DMA System Setup](#) on page 25
- [RealPresence Resource Manager System Setup-Part 2](#) on page 26
- [Request System Licenses](#) on page 26
- [Install System Licenses](#) on page 27
- [Migrate CMA System Database Information](#) on page 28

## Install the Blank Hard Drive and System Software

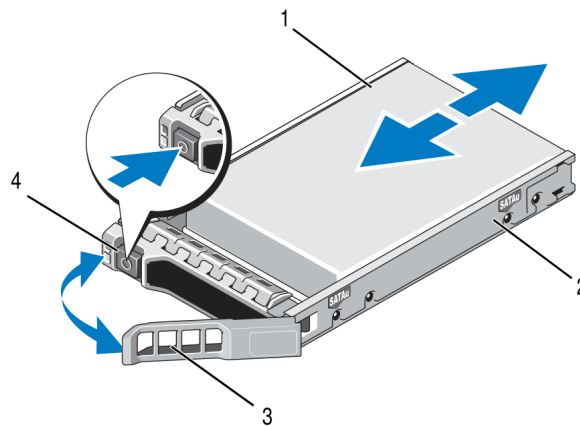
The Migration Hard Drive kit contains a blank hard drive that allows you to quickly migrate your CMA system while preserving the existing CMA system software. Once the system server hard drive is replaced, you need to configure the system's RAID (Redundant Array of Independent Disks) controller to recognize the blank drive. After the controller has initialized the drive for use, you can install the RealPresence Video DualManager 400 system software using the supplied software DVD.



The RealPresence Video DualManager 400 installation process requires a hard drive with a capacity of at least 146GB.

### To install the blank hard drive

- 1 Power off the CMA system using the power button on the front of the system bezel or by using the **Shutdown** button located in the top right of the Dashboard in the web UI.
- 2 Remove the hard drive from the system, as shown below:



- |   |                              |   |                |
|---|------------------------------|---|----------------|
| 1 | hard drive                   | 2 | drive carrier  |
| 3 | drive carrier release handle | 4 | release button |

- 3 Label the hard drive you have removed and store it in a cool, dry place.
- 4 Insert the blank hard drive into the server's empty hard drive bay.

### To configure the hard drive

- 1 Disconnect all network cables from the rear network ports of the CMA system.



This step is not optional. If the install process begins while a network cable is connected to the system, the system could fail to boot correctly once installation is complete.



The **Gb 1** port is the only network port used by the RealPresence Video DualManager 400 system.

- 2 Connect a keyboard and monitor to the CMA system server.
- 3 Power on the CMA system server.  
After several moments, the boot process is paused and the message **Press C to load the configuration utility** appears.
- 4 Press the **C** key.
- 5 Press **Y** to confirm.
- 6 Press any key to continue to load the configuration utility.  
The configuration utility loads and displays a Virtual Disk menu.
- 7 While in the Virtual Disk menu, press **F2** to open the disk sub menu.
- 8 Using the arrow keys, select **Clear Config** and press **Enter**.
- 9 Select **Yes** and press **Enter**.

- 10 Press `F2` to load the disk sub menu.
- 11 Use the arrow keys to select **Create New VD** and press `Enter`.
- 12 Press `Spacebar` to select the only available physical disk.
- 13 Use the `Tab` key to select **OK**.
- 14 Press `Enter`, and `Enter` again to confirm.
- 15 Press `F2` to load the disk sub menu.
- 16 The disk sub menu appears, with **Initialization** selected. Use the `Right Arrow` key to select **Start Init**.
- 17 Use the `Left Arrow` key to select **Yes** and press `Enter`.  
Disk initialization begins.  
After roughly 25 minutes, the message **Initialization complete on VD 00/0** appears.
- 18 Press `Enter`.
- 19 Press the `Esc` key to exit the RAID configuration utility.
- 20 Select **OK** and press `Enter`.
- 21 Press `Ctrl+Alt+Del` to reboot the system.  
The system reboots, and the error message **No boot device available** appears. This is normal.

### To install the RealPresence Video DualManager 400 system software

- 1 Insert the RealPresence Video DualManager 400 system software DVD into the system server DVD-ROM drive.
- 2 Press the `F1` key to retry the boot process.  
The system boots from DVD and begins writing the new software image, which takes roughly 40 minutes to complete.



When installation is complete, the system will eject the DVD and reboot twice. The system displays **localhost login:** on the screen.

## RealPresence Resource Manager System Setup-Part 1

Before you can restore the settings and configuration from the CMA system to the RealPresence Video DualManager 400 system, you need to complete the First Time Setup procedure for each system. You can complete First Time Setup using a PC connected to the system via an Ethernet cable. When connecting a PC to the system server, an Ethernet crossover cable is required to configure the system, and the PC must be configured with a static IP address.

### To step through the RealPresence Resource Manager system First Time Setup

- 1 Before you begin, disable all wireless connectivity on the PC and verify that the PC is not connected to a network.
- 2 Connect one end of a crossover Ethernet cable to the **Gb 1** port of the system server, and the other end of the cable to the PC's Ethernet port.

- 3 Configure the PC with a static IP address on the network 192.168.1.x (for example, 192.168.1.5).
- 4 Using a web browser, browse to the IP address 192.168.1.254.
- 5 Enter the administrator **Username** and **Password**.  
The factory default is admin/admin.
- 6 Click **Login**.  
Because the system has not previously been configured, the Licensing page of the setup wizard appears.
- 7 Read the *End-User License Agreement* (EULA).  
Please note that the EULA includes important definitions and usage limitations that will apply to your installation.
- 8 To accept the EULA terms and conditions, click **Accept**.
- 9 When the **Change Administrator Password** page appears, enter the **Old Password**.
- 10 For the **New Password**, enter a new password with a length of at least eight characters.
- 11 **Confirm the New Password** and click **Next**.  
The **Network** page appears.
- 12 Enter configuration values obtained from the *First Time Setup Worksheet* on [page 7](#) in the following fields:
  - **System Name**
  - **IPv4 Address**
  - **IPv4 Subnet Mask**
  - **IPv4 Default Gateway**
  - **Preferred DNS Server**
- 13 Click **Next**.  
The **System Time** page appears.
- 14 Configure these settings on the **System Time** page, as necessary:

Field	Description
System Time Zone	The time zone in which the system server resides.
Use Current Time	Select this check box to input the current date and time.
Current Date	The system date for the system.
Current Time	The system time for the system.
Use External NTP Server Time Synchronization	(Recommended) Select this check box to synchronize the system date and time with an external NTP server.
IP address or DNS resolved names separated by commas	The IP address or fully qualified domain name (ASCII only) of the NTP server.





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.

**15 Click Next.**

The **Certificates** page appears. By default the system is configured to use a default self-signed certificate.

**16** To configure and install other certificates for the system, refer to the *Polycom RealPresence Resource Manager System Operations Guide*.

Optionally, you can configure and install other certificates at a later date.

**17 Click Next.**

**18** When prompted to reboot, click **Commit the Settings and Restart**.

The system displays a confirmation message.

**19 Click Yes.**

The system reboots.

## RealPresence DMA System Setup

While the RealPresence Resource Manager system reboots after the steps on [page 23](#), you can log in to the DMA system and configure its network settings.

### To configure DMA system network settings

- 1 Point your web browser to the IP address `192.168.1.101`.  
The Polycom DMA system's login page appears.
- 2 Log in with user ID `admin` and password `admin`.  
The Polycom DMA system's management interface appears, displaying the **Dashboard**.
- 3 Go to **Admin > Local Cluster > Network Settings** and select the **System IP type** specified on the *First-Time Setup Worksheet*.
- 4 Enter the network values from the *First-Time Setup Worksheet*.
- 5 Click **Update**. When asked to confirm restarting the system, click **OK**.  
The system restarts.
- 6 Disconnect the crossover cable from the system server.
- 7 Reconnect the standard Ethernet cable, disconnected on [page 22](#), to the **Gb 1** port of the system server.
- 8 Return the PC's network configuration to its previous settings.
- 9 From a PC with network access to the Polycom DMA system, point your browser to the host name or IP address you assigned to the system and log in with user ID `admin` and password `admin`.
- 10 Go to **Admin > Local Cluster > Time Settings** and do the following:

- a Select the correct **System time zone** for your location.

We strongly recommend selecting the best location-specific setting, not one of the generic GMT offset settings. If you need to use a generic GMT offset, note that they use the Linux/POSIX convention of specifying how many hours ahead of or behind local time GMT is. Thus, the generic equivalent of America/Denver (UTC-07:00) is GMT+07, not GMT-07.

- b Under **NTP servers**, enter the IP addresses (or domain names) for the time servers from the First-Time Setup Worksheet.

We strongly recommend specifying at least one and preferably three time servers. Use NTP stratum 3 quality time servers if possible. At least one time server must be specified before creating or joining a supercluster.

- c Click **Update**. When asked to confirm restarting the system, click **Yes**.

The system begins to reboot.

## RealPresence Resource Manager System Setup-Part 2

You can now complete the initial configuration of the RealPresence Resource Manager system.

### To complete the RealPresence Resource Manager system First Time Setup

- 1 Log in to the RealPresence Resource Manager system using the IP address configured on [page 24](#). The **Enterprise Directory** page appears.
- 2 Click **Next** (these settings will be retained from the CMA system after migration). The **Directory Setup** page appears.
- 3 Click **Next** (these settings will be retained from the CMA system after migration). The system displays the message that you have completed first time setup. You have the option of logging out of the system or being redirected to the system Dashboard.
- 4 Click **Next** to go to the **Admin Dashboard**. The **Admin Dashboard** page appears.

## Request System Licenses

Once system setup is complete, you can request licenses for the RealPresence Video DualManager 400 system. Licensing the system before restoring any migrated CMA system data ensures that call traffic and registrations will be handled properly once you complete migration.

### To request a license for the RealPresence Resource Manager system

- 1 In a separate browser page or tab, log into the RealPresence Resource Manager system as an administrator.
- 2 Go to **Admin > Server Settings > Licenses** and record the system serial number:  
\_\_\_\_\_.
- 3 Go to <http://support.polycom.com>.

- 4 In the **Licensing & Product Registration** section, select **Activation/Upgrade**.  
A popup appears.
- 5 Select **All Other Polycom Products**.
- 6 Log in or **Register for an Account**.  
The **License and Product Activation** page appears.
- 7 Select **Site & Single Activation/Upgrade**.
- 8 In the **Site & Single Activation** page, enter the serial number you recorded in step 2.
- 9 Click **Next**.
- 10 Accept the **EXPORT RESTRICTION** agreement.
- 11 In the new **Site & Single Activation** page, enter the serial number listed on your License Certificate and enter the license number (shipped with the DVD Migration Kit) and click **Activate**.
- 12 In the **Key Code** field, click **Click here to download** to retrieve and save your license file.

### To request a license for the DMA system

- 1 In a separate browser page or tab, log into the DMA system as an administrator.
- 2 Go to **Admin > Local Cluster > Licenses** and record the system serial number:  
\_\_\_\_\_.
- 3 Go to <http://support.polycom.com>.
- 4 In the **Licensing & Product Registration** section, select **Activation/Upgrade**.  
A popup appears.
- 5 Select **All Other Polycom Products**.
- 6 Log in or **Register for an Account**.  
The **License and Product Activation** page appears.
- 7 Select **Site & Single Activation/Upgrade**.
- 8 In the **Site & Single Activation** page, enter the serial number for the DMA system you recorded in step 2.
- 9 Click **Next**.
- 10 Accept the **EXPORT RESTRICTION** agreement.
- 11 In the new **Site & Single Activation** page, enter the serial number listed on your License Certificate and enter the license number (shipped with the DVD Migration Kit) and click **Activate**.
- 12 In the **Key Code** field, record the key code that appears:  
\_\_\_\_\_.

## Install System Licenses

### To update the license for a RealPresence Resource Manager system

- 1 Log in to the RealPresence Resource Manager system.
- 2 Go to **Admin > Server Settings > Licenses**.

- 3 Click **Update License** to view the **Update License** dialog box.
- 4 Click **Choose File** to navigate to the license file you received from Polycom.
- 5 Click **Preview** to preview the license features.
- 6 On the **Update License** dialog box, click **Update**.

### To update a license for the DMA system

- 1 Log in to the DMA system.
- 2 Go to **Admin > Local Cluster > Licenses**.
- 3 Under the **Activation Keys** area, enter the license number you received from Polycom in the **Activation Key** text field.
- 4 Click **Update**.

For more information on RealPresence Video DualManager 400 system licensing, refer to the *RealPresence Video DualManager 400 System Getting Started Guide* on the Polycom support page at <http://support.polycom.com>.

## Migrate CMA System Database Information

The following section describes how to restore the CMA system settings to the RealPresence Resource Manager system.

### To migrate CMA system database information

- 1 Using a web browser, browse to the IP address configured during First Time Set Up.
- 2 Go to **Admin > Maintenance > Backup / Restore System Settings**.
- 3 Under **Select Archive File**, click the ... button.  
A file dialog appears.
- 4 Use the file dialog to browse to the **archive<xxxxx>.zip** migration archive file that you saved earlier in the migration process.
- 5 Click **OK**.
- 6 Click **Restore from Backup Archive**.  
The system displays an alert dialog to confirm the data restoration.



By default, the **Restore network settings** check box is selected in the alert dialog. This will cause the CMA system's network configuration to be restored to the RealPresence Resource Manager system, overwriting the values currently configured. Deselect this option to preserve the current RealPresence Resource Manager system network settings.

- 7 Click **Yes** to complete data migration. The system restores the archived data and reboots.

# Completing Migration

Once you have finished migrating configuration and archived data to the RealPresence Resource Manager system, you will need to perform additional configuration tasks. This chapter provides details on completing these tasks so you can begin to use the RealPresence Video DualManager 400 system in production.

- [Understanding Post-Migration Workflow Differences](#) on page 29
- [Post Migration Tasks](#) on page 30

## Understanding Post-Migration Workflow Differences

### Understanding the Concept of Conference Ownership

The RealPresence Resource Manager system introduces the ability to assign a conference owner for each conference scheduled on the system. A conference owner must be a non-guest participant in the conference.

Any scheduled CMA system conferences that were migrated to the RealPresence Resource Manager system will not have a conference owner assigned to them after migration is complete. If you wish to assign a conference owner to one of these conferences, there are two possibilities:

- For any migrated conference that contains at least one non-guest participant, the system will automatically select a non-guest participant as the conference owner when you edit the conference.
- For any migrated conference that contains only guest user participants, a conference owner will not be selected automatically. However, a user with the Administrator role can choose to add a full user participant to the conference and assign the user as the conference owner.

For more information on working with users and conferences, refer to the *Polycom RealPresence Resource Manager System Operations Guide*.

### Understanding RealPresence Resource Manager System User Roles

After migration, it is important to be aware the differences in the default and customized user roles for the system. The following table shows the progression of user roles starting from a CMA system at version 5.5.x, compared to a CMA system at version 6.2.3, and finally to the RealPresence Resource Manager system:

CMA System version 5.5.x roles	CMA System version 6.2.x roles	RealPresence Resource Manager system 8.0 roles after migration
Administrator	Administrator	Administrator
	Advanced Scheduler	Advanced Scheduler

CMA System version 5.5.x roles	CMA System version 6.2.x roles	RealPresence Resource Manager system 8.0 roles after migration
Scheduler	Scheduler	Scheduler
	View-Only Scheduler	View-Only Scheduler
	Auditor	Auditor
Operator	Operator	Operator
	Device Administrator	Device Administrator
	Area Administrator	Area Administrator
	Area Operator	Area Operator
	Area Scheduler	Area Scheduler
Customized Roles	Customized Roles	Customized Roles with default permissions
Added Roles	Added Roles	Added Roles with Scheduler permissions

Any customized or added user roles will need to be revisited and possibly reconfigured after you complete migration. See [Revisit Customized or Added User Roles](#) on page 33 for more information.

## Working With Direct Conference Templates

RealPresence Resource Manager system v8.0 introduces a change to the workflow of conference templates. The CMA system allows you to create and edit conference templates directly within the CMA web interface. In a RealPresence Resource Manager system, direct conference templates are based on existing conference profiles that you have created on the MCU. You can choose to have the template automatically synchronized with its associated RMX profile by maintaining the routing name of the RMX profile, or you can download the profile directly to the RealPresence Resource Manager system.

Conference templates migrated from a CMA system will appear under the **Conference > Direct Conference Templates** menu in the RealPresence Resource Manager system. Any migrated templates are read-only; if you need to edit a migrated conference template, you must delete the template in the RealPresence Resource Manager system interface and create it on a MCU that has been associated with the RealPresence Resource Manager system. This allows you to add the conference template on the RealPresence Resource Manager system as either a Standalone or Linked Template.

Refer to Chapter 34 of the *Polycom RealPresence Resource Manager System Operations Guide* for more information on using Direct Conference Templates.

## Post Migration Tasks

### Verify Enterprise Directory Integration Settings

If your CMA system was configured with Microsoft Active Directory® integration, you should verify these settings once the migration archive has been restored. Log in to the RealPresence Resource Manager

system and go to **Admin > Directories > Enterprise Directory**. Make sure that the following fields are correct:

- **Ignore Disabled Enterprise Directory Users**
- **Enterprise Directory Exclusion Filter**

If the RealPresence Resource Manager system is integrated with Active Directory, you need to integrate the DMA system with Active Directory as well. For more information on DMA system Active Directory integration, refer to Chapter 7 of the *Polycom DMA 7000 System Operations Guide*.

## Integrate the RealPresence Resource Manager and DMA Systems

The RealPresence Video DualManager 400 system divides functions previously handled solely by the CMA between its two system applications. When you integrate the DMA system with the RealPresence Resource Manager system, the main functions are shared as follows:

System	Main Services Provided
Polycom RealPresence Resource Manager	<ul style="list-style-type: none"> <li>• Network device and endpoint management</li> <li>• Network topology management</li> </ul>
Polycom DMA 7000	<ul style="list-style-type: none"> <li>• Conference management</li> <li>• Gatekeeper functionality (call control)</li> <li>• Reporting</li> <li>• SIP Proxy</li> </ul>

You can integrate the systems by adding the DMA system to the Network Device area of the RealPresence Resource Manager system. Among many other benefits, integration allows you to configure site and topology and user-to-device associations in one place instead of two, ensuring consistency. Verify site topology and territory information in the systems after integration.

For more information on integrating the RealPresence Resource Manager system and DMA system, refer to Chapter 24 of the *Polycom RealPresence Resource Manager System Operations Guide*.

## Begin Using the DMA System Gatekeeper Services

Once the systems are integrated, you should configure endpoints and network devices to use the DMA system's gatekeeper services. This can be done in several ways:

- Dynamic Provisioning Profiles (for dynamic endpoints, such as RealPresence Group Series systems)
- Scheduled Provisioning Profiles (for non-dynamic endpoints, such as VSX systems)
- From the interface of each device (for network devices, such as RMX systems)

For more information on using provisioning profiles to configure endpoints, refer to the *Polycom RealPresence Resource Manager System Operations Guide*.

## Add any Removed RealPresence Endpoint Information

As detailed in [Data That Is Not Captured in the Migration Archive](#) on page 15, some of your endpoints may have been removed from the RealPresence Resource Manager system during migration. If so, the

endpoints' information, aliases, and scheduled conferences are stored in the following human-readable files:

File name	File contents
Migration-Deleted_Device.csv	Endpoint information (Names, IP addresses, etc)
Migration-Deleted_Alias.csv	H.323 and E.164 aliases belonging to these endpoints
Migration-Deleted_Conference.csv	Any scheduled conferences involving these endpoints

You can download each of these files individually from the RealPresence Resource Manager system under the menu **Admin > Maintenance > System Log Files**, and use them to re-add scheduled conferences or endpoint aliases that may have been removed from the system. Refer to the *Polycom RealPresence Resource Manager System Operations Guide* for more information on adding endpoint aliases and scheduling conferences.

## Rebuild System Dial Rule Information

If you followed the optional procedures to save dial rule data from the CMA system in [Creating a Migration Archive](#) on page 15, you can use these files as a reference when configuring dial rule information in the DMA system.

A freshly installed DMA system contains a useful set of default dial rule entries that can be modified for use in a wide range of scenarios. If your CMA system had very specific, complex dial rules and you need to use these files to rebuild them on the DMA system, contact your Polycom Global Services (PGS) representative for assistance.

Refer to the *Polycom DMA 7000 System Operations Guide* for more information on configuring the default dial rules in the DMA system.

## Complete Provisioning Profile Configuration for Microsoft Lync

If you have migrated a version 5.5.x CMA system that was configured to provision endpoints for a Microsoft Lync environment, you need to add the Microsoft Lync SIP settings to a Network provisioning profile in the RealPresence Resource Manager system after migration. These steps are not necessary if your CMA system was running version 6.x prior to migration.

### To add Microsoft Lync information to a network provisioning profile configuration

- 1 Log in to the system as an Administrator.
- 2 Go to **Endpoint > Dynamic Management > Provisioning Profiles**.
- 3 Select the provisioning profile you need to change.
- 4 Under **Actions**, click **Edit**.
- 5 The **Edit Profile** window appears.
- 6 Select **SIP Settings**.
- 7 Enable the **Enable SIP** check box if it is disabled.
- 8 Enter the Microsoft Lync server IP address into the **Proxy Server** and **Registrar Server** fields.
- 9 Change the **Server Type** drop-down value to **Microsoft**.



**10 Click Ok.**

For further guidance on using provisioning profiles with the RealPresence Resource Manager system, refer to the *Polycom RealPresence Resource Manager System Operations Guide*.

## Revisit Customized or Added User Roles

The RealPresence Resource Manager system will revert any customized user roles to the default permissions of that role, or, if that role was added to the system, to the default permissions of the Scheduler role.

For example, if the permissions of the existing Operator role on a CMA system are modified, migrating the system will cause the roles to revert to the standard Operator role defaults. If a role called “Power Users” was created on the CMA system prior to migration, after migration a role with that name will still exist, but it will have the default Scheduler permissions assigned to it.

If you created or customized any user roles on the CMA system before migration, please revisit these roles in the RealPresence Resource Manager system under **User > User Roles**. Refer to the *Polycom RealPresence Resource Manager System Operations Guide* for more information on working with user roles.

## Further Tasks

Not all setup procedures are described in this document. Depending on your configuration, there may be further tasks you need to perform to complete migration. For example:

- Recreate RealPresence Resource Manager certificates
- Resubmit endpoint software update packages
- Reschedule software updates

We recommend reviewing the official Polycom RealPresence Video DualManager 400 product documentation, as well as the *Polycom DMA 7000 System Operations Guide* and the *Polycom RealPresence Resource Manager System Operations Guide*, for information on completing these tasks and how to proceed once migration is complete.

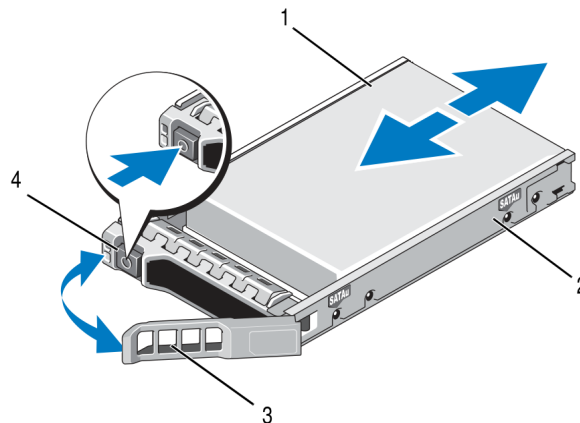
# Recovering a CMA System

In the event of a postponed or failed migration, you can follow these steps to recover previous CMA system functionality. After the recovery process is completed, your CMA system should be in its pre-migration state. This chapter assumes that a keyboard and monitor are connected to the system you are recovering.

## Replace the CMA System Server Hard Drive

### To replace the system server hard drive

- 1 Power off the system server.
- 2 Remove the hard drive from the system server, as shown below:



- |   |                              |   |                |
|---|------------------------------|---|----------------|
| 1 | hard drive                   | 2 | drive carrier  |
| 3 | drive carrier release handle | 4 | release button |

- 3 Insert the original hard drive into the system server.
- 4 Power the system server on.  
The boot process begins, and the message **Foreign configuration(s) found on adapter** is displayed on the screen.
- 5 Press the **F** key immediately to import the configuration.
- 6 Press any key to continue the boot process.
- 7 The CMA system boots fully, and is ready to use.