



MIGRATION GUIDE

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Polycom® RealPresence® Video DualManager 400 System to RealPresence Platform



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6001 America Center Drive
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USA

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About This Guide

This Migration Guide is for those Polycom RealPresence Video DualManager 400 system users who intend to migrate their existing system to separate RealPresence Resource Manager and RealPresence DMA systems.

This guide addresses each application of the RealPresence Video DualManager 400 system individually when appropriate, using the following naming conventions:

- RealPresence DMA system instance
- RealPresence Resource Manager system instance

Before You Begin

Polycom strongly recommends 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 newly installed systems to function properly in a production environment. Refer to the “Known Issues” sections of the *Polycom RealPresence Resource Manager System Release Notes* and the *Polycom RealPresence DMA System Release Notes* for the latest release of each product before beginning migration, as this information may be helpful.

Audience, Purpose and Required Skills

This document is written for a technical audience. You must know or have the following:

- Basic computer and network system administration skills
- Virtual machine (VM) concepts
- Network configuration, including IP addressing, subnets, gateways, domains, DNS, time servers, and possibly network routing



Note: Systems you migrate to must inherit IP addresses from current deployment

This Migration Guide assumes that during migration you will configure the RealPresence DMA system and RealPresence Resource Manager system with the same IP address that their corresponding instances used on the RealPresence Video DualManager 400 system.

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

Get Help

For more information about installing, configuring, and administering Polycom products, refer to [Documents and Downloads](#) at Polycom Support.

Polycom and Partner Resources

In addition to this guide, the following documents provide details about the RealPresence DMA system, RealPresence Resource Manager system, and RealPresence Video DualManager 400 system. To access these documents, go to support.polycom.com.

- *Polycom RealPresence DMA System Release Notes*
Provides information you need to know about the specific release of the system you're deploying.
- *Polycom RealPresence DMA System Operations Guide*
Provides more detailed and specialized configuration, operation, and administration information you need to know when using the RealPresence DMA system.
- *Polycom RealPresence Resource Manager System Release Notes*
Provides information you need to know about the specific release of the system you're deploying.
- *Polycom RealPresence Resource Manager System Operations Guide*
Provides more detailed and specialized configuration, operation, and administration information you need to know when using the RealPresence Resource Manager system.
- **Online help**
In the management interface, select **Help** to access the entire help system, or click the **Help** button in any dialog to see the specific help topic for that location.
- **Partner product interoperability** - Refer to the partner deployment guides.
- **Specific certifications** - Refer to:

www.polycom.com/solutions/solutions-by-industry/us-federal-government/certification_accreditation.html

The Polycom Community

The [Polycom Community](#) gives you access to the latest developer and support information. Participate in discussion forums to share ideas and solve problems with your colleagues. To register with the Polycom Community, simply create a Polycom online account. When logged in, you can access Polycom support personnel and participate in developer and support forums to find the latest information on hardware, software, and partner solutions topics.

Prepare to Migrate a System

Before you begin migration, you 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](#)
- [Complete the First Time Setup Worksheets](#)
- [Upgrade the System Instances](#)
- [Back Up Existing Data](#)
- [Supported Migration Paths](#)

Collect the Necessary Materials

Before beginning, ensure you have access to these materials:

- Polycom RealPresence DMA 7000 System Operations Guide
- Polycom RealPresence Resource Manager System Operations Guide
- Completed First-Time Setup Worksheets
- Keyboard and VGA Monitor
- Ethernet crossover cable
- PC running Microsoft Windows with:
 - 1280x1024 (SXGA) minimum display resolution; 1680x1050 (WSXGA+) or greater recommended
 - Ethernet port
 - Microsoft Internet Explorer 7, 8, or 9
 - Adobe Flash Player 17 or later

Complete the First Time Setup Worksheets

Before you begin system setup, fill out the applicable fields in the My System Values column of the following worksheet. At a minimum, the systems you are migrating to MUST use the IP addresses that the RealPresence Video DualManager system instances currently use. For the IPv4 address in each First Time Setup Worksheet, fill in the IP address currently used by the respective system instance.

Network configuration of an appliance (hardware-based) RealPresence DMA system involves options and settings not relevant in a virtual deployment. Although those settings are present in the RealPresence DMA system management interface's Network Settings page, they must not be used in a virtual deployment.

RealPresence DMA system First-Time Setup Worksheet

Configuration Information	My System Values	Description
System IP type		Specify whether the 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	For migrated systems, specify a single-server configuration. The Server 2 section below is not used. Migrated systems must be single-server systems.
System split network setting		Specify whether to combine or split the system's management and signaling interfaces. If the same network will be used for both management (administrative access) and signaling, the signaling IP addresses and Shared Signaling Network Settings section below are not used. Virtual Edition systems must combine the system's management and signaling interfaces. Caution: Choose split networking only if you need to restrict access to the management interface and SNMP to users on an isolated non-public network separate from the enterprise network. Typically, this is the case only in high-security environments. In most network environments, users accessing the management interface are on the same enterprise network as endpoints and other devices communicating with the RealPresence DMA system, and they use the same physical and virtual IP addresses and the same network interface. To split the network configuration, you must use different gateways and subnets for management and signaling, and separate physical connections for the management and signaling networks (eth0 for management, eth2 for signaling). In a split network configuration, routing rules are necessary for proper routing of network traffic. If management and signaling traffic are combined on the same network (subnet), both use the same physical and virtual IP addresses and the same network interface. If you are not sure whether split networking is appropriate, possible, or necessary for this installation, consult the appropriate IT staff or network administrator for your organization.
Server 1		Only the Server 1 settings are used for migrated systems.

Configuration Information	My System Values	Description
Management host name		<p>Local host name of the Polycom RealPresence DMA system's combined interface.</p> <p>Host names 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.</p> <p>The host name is combined with the domain name specified under General System Network Settings to form the fully qualified domain name (FQDN).</p>
Management IPv4		<p>Static, physical IP address(es) for the first (or only) server's management (or combined) interface.</p>
Management IPv6		
Signaling IPv4		<p>Static, physical IP address(es) for the first (or only) server's signaling interface (if networking is split).</p> <p>Not used for Virtual Edition deployments.</p>
Signaling IPv6		
Server 2		<p>These settings are not used for migrated systems.</p>
Host name	Not used	<p>Local host name of the second server's management (or combined) interface.</p> <p>Host names 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.</p> <p>The host name is combined with the domain name specified under General System Network Settings to form the fully qualified domain name (FQDN).</p>
IPv4	Not used	<p>Static, physical IP address(es) for the second server's management (or combined) interface.</p>
IPv6	Not used	
Signaling IPv4	Not used	<p>Static, physical IP address(es) for the second server's signaling interface (if networking is split).</p>
Signaling IPv6	Not used	

Configuration Information	My System Values	Description
Shared Management Network Settings		In the combined network configuration (required for Virtual Edition deployments), users accessing the management interface are on the same network as endpoints and other devices communicating with the RealPresence DMA system, and these settings are used for both management and signaling.
Virtual host name		<p>For a single-server system in IPv6-only mode, the local host name of the virtual management host. Not used for a single-server system with IPv4 enabled.</p> <p>Host names 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.</p> <p>The host name is combined with the domain name specified under General System Network Settings to form the fully qualified domain name (FQDN).</p>
Virtual IPv4		For a single-server system in IPv6 only mode, the IP address(es) of the virtual management host. Not used for a single-server system with IPv4 enabled.
Virtual IPv6		
Subnet mask		IPv4 network mask that defines the subnetwork of the system'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 system's management interface.
IPv4 gateway		IP address of the gateway server used to route network traffic outside the subnet.
Management Link		
Auto-negotiation		<p>Yes or no. If no, indicate speed and full or half duplex.</p> <p>Note: Auto-negotiation is required if your network is 1000Base-T.</p>

Configuration Information	My System Values	Description
LAN Security Settings		<p>These settings are not used for Virtual Edition deployments.</p> <p>Caution: In a network that requires 802.1x authentication for servers (this is rarely the case), incorrect settings in this section and, if applicable, lack of the proper certificate(s) can make the system unreachable. Recovering from this situation requires connecting a laptop to the system using a crossover cable in order to access it.</p>
Enable 802.1x		<p>Enables the system to authenticate this network interface to the LAN. Depending on the authentication method, the access credentials required may be either a user name and password (specified below) or a security certificate.</p> <p>If you are deploying a Virtual Edition system, do not select Enable 802.1x.</p>
User name		The user name with which the system may authenticate this interface.
Password Confirm password		The password for the user name entered above.
EAP Method		The Extensible Authentication Protocol method used to establish trust with the authentication server (this is also known as the outer authentication protocol).
Protocol		When a TLS tunnel is established with the authentication server, the protocol used within the tunnel (this is also known as the inner authentication protocol).

Configuration Information	My System Values	Description
Shared Signaling Network Settings		<p>These settings are not used for Virtual Edition deployments.</p> <p>For Appliance Edition deployments:</p> <p>The settings in this section are enabled only if management and signaling traffic are on separate networks. If so, they apply to the entire system (both servers in two-server configuration).</p> <p>For a one-server configuration, the virtual host name and IP fields are disabled. (Exception: If only IPv6 is enabled, the system must have two addresses, so a single-server system must still have a virtual host name and IP address.)</p> <p>The settings are the same as those in Shared Management Network Settings, except that under Signaling Link, the signaling network interface (eth2) can be disabled. This capability exists for debugging purposes.</p>
General System Network Settings		
DNS search domains		One or more fully qualified domain names, separated by commas or spaces. The system domain you enter below is added automatically, so you need not enter it.
DNS 1		IP addresses of up to three domain name servers. At least one DNS server is required. Your system must be accessible by its host name(s), not just its IP address(es), so you (or your DNS administrator) must create A and/or AAAA records for IPv4 and IPv6, respectively, as well as the corresponding PTR records, on your DNS server(s). A/AAAA records and PTR records that map each physical host name to the corresponding physical IP address and each virtual host name to the corresponding virtual IP address are mandatory, as are the corresponding PTR records that allow reverse DNS resolution of the system's physical or virtual host name(s).
DNS 2		
DNS 3		
Domain		<p>The domain for the system. This is combined with the host name to form the fully qualified domain name (FQDN). For instance:</p> <p>Host name: dma1</p> <p>Domain: callservers.example.com</p> <p>FQDN: dma1.callservers.example.com</p>

Configuration Information	My System Values	Description
Signaling DSCP		<p>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.</p> <p>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.</p>
Management DSCP		<p>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.</p> <p>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.</p>
Default IPv6 gateway		<p>The IPv6 gateway's address and the interface used to access it, generally eth0, specified as: <code><IPv6_address>%eth0</code></p>
Default IPv4 gateway		<p>Not used for Virtual Edition deployments, which must combine the system's management and signaling interfaces and thus have only one IPv4 gateway specified.</p>
System Time		<p>In Virtual Edition deployments, some of the System Time settings are automatically configured as part of the installation process.</p>
Time zone		<p>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).</p> <p>If you do 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.</p>
NTP server #1		<p>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.</p>

Configuration Information	My System Values	Description
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).
Routing Configuration		<p>Special routing rules are generally not needed in the combined network configuration, which is required in Virtual Edition deployments.</p> <p>In a split network configuration, routing rules are necessary for proper routing of network traffic.</p> <p>If you aren't sure, consult the appropriate IT staff or network administrator for your organization.</p>
Host/network		The IP address of the destination network host or segment.
Prefix length		<p>The CIDR (Classless Inter-Domain Routing) value that, together with the destination host/network address, defines the subnet for this route.</p> <p>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.</p>
Interface		Specify the interface for this route. In the combined network configuration required in Virtual Edition deployments, this is eth0.
Via		IP address of router for this route. Optional and only needed for non-default routers.

RealPresence Resource Manager System First-Time Setup Worksheet

Item	My System Values	Factory-Set Default Values	Description
System Network Settings (from Admin > Server Settings > Network)			
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. Set the level between 0 - 63.
IPv6 Address			IPv6 global address.
IPv6 Prefix length			Within IPv6 networks, the prefix length is the equivalent of the subnet mask in IPv4 networks. Should be 1-128.
IPv6 Default Gateway			The IPv6 address of the gateway server/router. For IPv6 networks only.
IPv6 Link Local Address			Read-only field. The RealPresence Resource Manager system generates a value for this field when IPv6 is enabled.
IPv4 Address		192.168.200.11	Static, physical IP address for the system server on an IPv4 network. 192.168.200.11 is the default value that needs to be changed according to your own network.
IPv4 Subnet Mask		255.255.255.0	Network subnet mask of the system server. For IPv4 networks only.
IPv4 Default Gateway		192.168.200.1	IP address of the gateway server/router. For IPv4 networks only. 192.168.200.1 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 <code>polycom.com</code> , not the fully qualified path of <code><hostname>.polycom.com</code> .
Preferred DNS Server			IP address of the domain name server.

Item	My System Values	Factory-Set Default Values	Description
Alternate DNS Server			IP address of an alternate domain name server. The alternate IP address can does not have to match the network type of the preferred server. For example, the preferred DNS server can be IPv4, while the alternate DNS server can be IPv6.
Enable 802.1.x		Disabled	Enable 802.1.x if your network requires this type of authentication. 802.1.x is commonly required in maximum security environments.
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.
System Time Information (from Admin > Server Settings > System Time)			
System Time Zone			
Current Date			
Current Time			
External NTP Server			For Appliance Editions, IP address of external NTP time server (optional). For Virtual Editions, the value for NTP server is inherited from the RealPresence Platform Director system.
Information Required for Polycom Customer Support (from Admin > Server Settings > Licenses)			
Serial number			
License number			

Upgrade the System Instances

Before migrating from a RealPresence Video DualManager system to Polycom Rack Server systems or Virtual Edition systems, you must upgrade the RealPresence Video DualManager system's RealPresence DMA system instance to version 6.1.2, and the RealPresence Resource Manager instance to version 8.2.1.

Upgrade the RealPresence DMA System Instance

Perform the following tasks to upgrade the RealPresence DMA system instance from version 6.0.2 to version 6.1.2:

To upgrade the RealPresence DMA system instance

- 1 Download the version 6.1.2 RealPresence DMA system upgrade package from <http://support.polycom.com>.
- 2 On your PC, open a command prompt.
- 3 In the command prompt, run the command `ping -t <IP address>` where `<IP address>` is the IP address of the RealPresence DMA system instance.

This command starts a continuous “Ping” of the system instance, which helps verify when it is safe to restart. There is no visual feedback from the server LCD screen or monitor (if attached).
- 4 Go to the **Maintenance > Software Upgrade** page.
- 5 Click the **Upload** button.
A file chooser dialog appears.
- 6 Use the file chooser dialog to select the v6.1.2 upgrade package.
- 7 Click **Open**.
A progress dialog appears.
- 8 Click the **Upgrade** button and start a timer.
- 9 After at least eight minutes have elapsed, ensure that the system instance is no longer responding to “ping” requests. Do not proceed until the system has not responded to “ping” requests for at least 40 seconds.
- 10 Press and hold the server’s power button, located on the front of the system.
- 11 Once the server is powered off, press the power button again to power it back on.
- 12 After 22 total minutes have elapsed, ensure that the system instance is no longer responding to “ping” requests. Do not proceed until the system has not responded to “ping” requests for at least 40 seconds.
- 13 Power off the server using the power button.
- 14 Once the server is powered off, press the power button again to power it back on.
- 15 Once the server is powered on, allow at least 40 minutes for the upgrade to complete.
- 16 Using a web browser, log in to the RealPresence DMA system instance.
- 17 Go to **Help > About DMA 7000** to ensure that the system instance has been upgraded.

Upgrade the RealPresence Resource Manager System Instance

To upgrade a v8.0.x or v8.1.x RealPresence Resource Manager system to v8.2.1, you must first perform an interim system upgrade to v8.2, then perform the upgrades documented here. Please see the *RealPresence Resource Manager System Release Notes* for v8.2 for the earlier upgrade procedures.

To upgrade the RealPresence Resource Manager system instance

- 1 On your PC, download the RealPresence Resource Manager system 8.2.1 upgrade package from <http://support.polycom.com>.



Note:

The upgrade package is available in the Appliance Edition Software Downloads section of the support page. The upgrade package link is identified by the upgrade path (for example, “RealPresence® Resource Manager System Upgrade Software for v8.2.1”). The upgrade package has a filename similar to “rprm-8.2.1-xxxxxx.bin”.

- 2 Verify that the package is available on your local system.
- 3 Go to the **Admin > Maintenance > Server Software Upgrade** page.
- 4 Click the **Upload upgrade file to server** button.
A file chooser dialog appears.
- 5 Use the file chooser dialog to select the 8.2.1 upgrade package downloaded previously.
- 6 Click **Open**.
A **File Upload** dialog appears.
- 7 When the system indicates the file upload is complete, click **OK**.
- 8 Click the **Upgrade** button.
When the upgrade is finished, a dialog displays the following message:
Upgrade Completed. Click to Log In.
- 9 Log back into the system instance and verify that version 8.2.1 is installed.

Back Up Existing Data

You can now back up each system instance’s data in preparation for migrating the data to the new servers.

Back up the RealPresence DMA System Instance

Perform the following tasks to save a full backup of the RealPresence DMA system instance.

To back up the RealPresence DMA system instance

- 1 Using a web browser, log in to the RealPresence DMA system instance.
- 2 Go to the **Maintenance > Backup and Restore** page.
- 3 Click **Create New (Full)**.
The system creates a backup archive and displays a confirmation dialog when complete.
- 4 Download and save the newly created backup archive.

Back up the RealPresence Resource Manager System Instance

Perform the following tasks to save a backup archive of the RealPresence Resource Manager system instance.

To back up the RealPresence Resource Manager system instance

- 1 Using a web browser, log in to the RealPresence Resource Manager system instance.
- 2 Go to the **Admin > Maintenance > Backup / Restore System Settings** page.
- 3 Click **Create and Download a Backup Archive**.
The system creates a backup archive and displays a confirmation dialog when complete.
- 4 Download and save the newly created backup archive.
- 5 Turn off the RealPresence Video DualManager system by pressing and holding the server's power button, located on the front of the system.

Powering down the system prevents IP address conflicts when the freshly migrated systems are brought online; the systems to which you are migrating will use the same IP addresses as the RealPresence Video DualManager system instances.

Supported Migration Paths

Polycom supports three RealPresence Video DualManager 400 system migration scenarios:

- Migrate each RealPresence Video DualManager system instance to separate Polycom Rack Server 220 (R220) deployments
- Migrate each RealPresence Video DualManager system instance to separate Virtual Edition systems (requires RealPresence Platform Director)
- Migrate the RealPresence Resource Manager system instance to a Polycom Rack Server 220 (R220) deployment, and repurpose the RealPresence Video DualManager system hardware for a standalone RealPresence DMA system installation (requires a RealPresence Video DualManager system based on Polycom Rack Server 620 (R620) hardware)



Both target systems must be the same Edition

Polycom does not support migration of one system instance to an Appliance Edition system and the other system instance to a Virtual Edition system. Both migrated systems must either be Appliance Edition Systems or both must be Virtual Edition Systems.

Depending on which migration path you choose, you may be required to ensure the original and target systems are running certain versions of software.

Migrate to Two Polycom Rack Server 220 (R220) Systems

This section guides you through migration to two Polycom Rack Server 220 (R220) systems. Once you complete this section, you will be ready to test your migrated systems to ensure they function as expected, and finish any remaining configuration.

This section contains the following topics:

- [Verify Shipment Contents](#)
- [Unpack and Install the Hardware](#)
- [Prepare the USB Flash Drive](#)
- [Install System Software](#)
- [Restore System Data](#)
- [Upgrade Systems to the Latest Software Version](#)
- [Add Licenses to the Systems](#)

Verify Shipment Contents

Before beginning migration, you need to verify that the Polycom Rack Server 220 (R220) hardware shipments are complete. Polycom Rack Server shipments include the server and other contents. You should verify the type of server and other contents of your shipment when you unpack the system. As noted in the following table, some items may arrive in a separate shipment.

Item	Description
2 Polycom Rack Servers	Included
2 system DVDs (RealPresence DMA System version 6.1.2 software, RealPresence Resource Manager system version 8.2.2 software)	May be shipped separately
1 blank USB flash drive	Included
1 USB flash drive labeled Diagnostics that contains server diagnostics utilities. Use these utilities only under the direction of Polycom Global Services.	Included

Item	Description
Power cord(s)	May be shipped separately
Rail kit	Static rails
Bezel with Polycom badge	Included
RealPresence Resource Manager system, Appliance Edition, and RealPresence DMA system, Appliance Edition license and activation keys	May be shipped separately
Polycom warranty letter	Included
Product Information Guide	Included

Unpack and Install the Hardware

Follow these steps to unpack and install the Polycom Rack Server 220 (R220) servers.

To unpack and install the hardware

- 1 Examine the shipping container 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.
- 2 Open and review the container packing slips.
- 3 Open the container and examine the contents for damage.
If you find damage, file a claim with the delivery carrier. Keep all shipping materials in case you need them later.
- 4 Unpack your system and identify each item.
A single-server Polycom Rack Server 220 (R220) shipment includes the items listed in Shipment Contents.
- 5 Assemble the rails and install the server in the rack.
To rack-mount a server, see the following instructions:
<http://www.dell.com/support/home/us/en/04/product-support/product/poweredge-r220/manuals>
- 6 Connect the server's power cable(s) to the server and connect a VGA cable from the server to the monitor.
- 7 Connect all power cables into a grounded electrical outlet or separate power source, such as an uninterruptible power supply (UPS) or power distribution unit (PDU).
- 8 Connect a monitor and keyboard to the server.
- 9 Press the power button on the server and on the monitor.
The power indicators should light.
- 10 Create one access password for the system BIOS.
- 11 Set the correct system time in the system BIOS.

- 12 Install the bezel (optional).
- 13 Connect the **Port 0** Ethernet port to the enterprise network.
The **Port 0** Ethernet port is the eth0 network interface, which must be used for this purpose.
- 14 Repeat steps 1-13 for the second server.

Prepare the USB Flash Drive

You must prepare the USB flash drive included in the server package using the Polycom RealPresence DMA USB Configuration Utility (available in the /usb-gui directory of the system software DVD and at <http://support.polycom.com>). This allows you to configure the Polycom RealPresence DMA system, Appliance Edition server with the USB flash drive during migration.

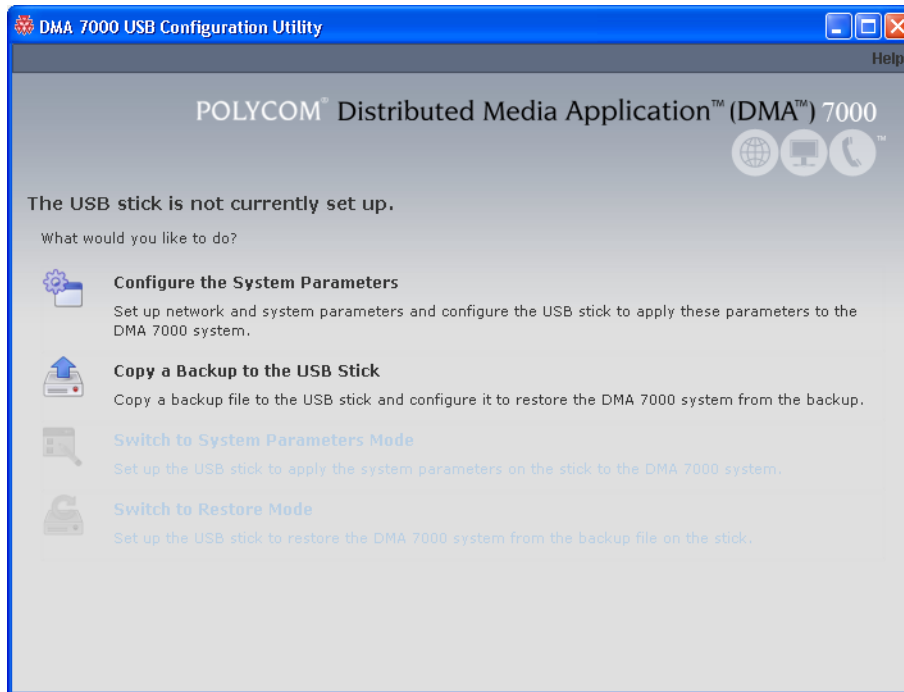


Caution: Use the latest version of the RealPresence DMA USB Configuration Utility

For compatibility reasons, ensure that you use the latest version of the RealPresence DMA system USB Configuration Utility.

To prepare the USB flash drive using the USB Configuration Utility

- 1 Connect the blank USB flash drive to the Windows PC on which you put the ZIP file containing the Polycom RealPresence DMA system USB Configuration Utility.
Note that the USB Configuration Utility files must be at the root of the drive, not in a folder. One of the files is autorun.inf, which enables the USB Configuration Utility to start automatically when the USB flash drive is inserted into a PC that supports autorun. In a highly secure environment, this file may not be allowed.
- 2 Unzip the Polycom RealPresence DMA USB Configuration Utility files to the USB flash drive.
- 3 Start the USB Configuration Utility by double-clicking `dma7000-usb-gui.exe`.
- 4 In the **USB Configuration Utility** window, click **Configure the System Parameters**.



- 5 On the **Network** page, select the **System IP type**, **System server configuration**, and **System split network setting** that you specified on the [RealPresence DMA system First-Time Setup Worksheet](#). Note that the settings you choose for these items determine which of the remaining network value fields are enabled. For instance, when you specify a single-server configuration, the Server 2 fields are disabled.
- 6 Enter the network values from the [RealPresence DMA system First-Time Setup Worksheet](#).
If you need to set up a special network routing rule or rules, click **Routing Configuration**, create the rule(s), and click **OK**. In the usual combined network configuration, routing rules are generally not necessary. In a split network configuration, routing rules are necessary for proper routing of network traffic. If you are not sure what rule or rules you need, consult the appropriate IT staff or network administrator for your organization.
- 7 Click **Next**.
- 8 On the **System Time** page, select the correct **System time zone** for your location.
Polycom recommends that you select the best location-specific setting, not one of the generic GMT offset settings. The location-specific settings automatically include the correct daylight saving time adjustments (if any) for that location and will be updated as locales change their time policies in the future.
- 9 Under **NTP servers**, enter the IP addresses (or domain names) for the time servers from the [RealPresence DMA system First-Time Setup Worksheet](#).
Polycom recommends 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.
- 10 Click **Done**.
The utility confirms that the configuration file was created and returns you to the initial menu.

- 11 Verify that **The USB stick is set to apply system parameters** is displayed in the initial menu, as shown next.



- 12 Close the program.
- 13 On your PC, eject the USB flash drive. When a message tells you it's safe to do so, disconnect the USB flash drive from the PC.

Install System Software

You can now install the RealPresence DMA system software, version 6.1.2, and the RealPresence Resource Manager software, version 8.2.2 on the new servers. You can install the software on each server at the same time.

Install RealPresence DMA System Software

Follow these steps to install RealPresence DMA system software, version 6.1.2, on one of the servers. Use the RealPresence DMA system software DVD included with the server shipment.

To install the RealPresence DMA system software

- 1 Turn on the RealPresence DMA system server and insert the RealPresence DMA system software DVD included with the server shipment.
- 2 Restart the system server.
The server boots from the DVD, and the installation starts. Installation takes approximately 20-30 minutes, after which the DVD ejects and the server restarts twice.
- 3 Remove the DVD from the system server DVD drive.

- 4 Insert the USB flash drive you configured earlier into a USB port on the server.
- 5 Restart the system server.

After it boots, the server reads its network and system parameters from the USB flash drive and applies them.

Install RealPresence Resource Manager System Software

Follow these steps to install the RealPresence Resource Manager system software, version 8.2.2, onto the remaining Polycom Rack Server 220 (R220) using the RealPresence Resource Manager system software DVD included with the server shipment.

To install the RealPresence Resource Manager system software

- 1 Turn on the server and insert the RealPresence Resource Manager system software DVD into the DVD drive.
- 2 Restart the system server.
The server boots from the DVD.
- 3 At the system prompts, configure the following settings for your system and press **Enter** after you complete each setting.

Do not accept the default network settings. Change the default settings to match the settings of the RealPresence Resource Manager system instance you are migrating from.

Prompt	Default Setting
Enter the Polycom RealPresence Resource Manager system host name	PLCM_RPRM
Enter the system domain name	
Enter the system host IP address	192.168.1.254
Enter the netmask for the system	255.255.255.0
Enter the Default Gateway for the system	192.168.1.1
Enter a DNS for the system	192.168.1.100
Enter the profile type	2

- 4 Press **Enter** to start the installation process.
Installation takes approximately 15 minutes, after which the DVD ejects and the server restarts.

Restore System Data

You can now restore your previously backed up data to the newly installed systems.

Restore RealPresence DMA System Data

Perform the following tasks to restore your backed up data to the RealPresence DMA system.


To restore the backup archive

- 1 Go to **Maintenance > Backup and Restore**.
- 2 Select the backup file from which you want to restore.
- 3 In the **Actions** list, click **Restore Selected**.
- 4 The **Confirm Restore** dialog appears.
- 5 Read the warning, make sure that you want to continue, select all **System Backup Components** options, and click **OK**.
After a short delay, a dialog informs you that the system is going to be restored and you'll be logged out.
- 6 Click **OK**.
The system logs you out and the server reboots.
- 7 Log back in as a local **admin** user and:
 - a Go to **Maintenance > Software Upgrade** and check the **Operation History** table.
 - b If the system was integrated with Active Directory, go to **Admin > Integrations > Microsoft Active Directory** and re-enable the integration.

Restore RealPresence Resource Manager System Data

Perform the following tasks to restore your backed up data to the RealPresence Resource Manager system.

To restore the backup archive

- 1 Go to **Admin > Maintenance > Backup/Restore System Settings**.
- 2 In the **Select Archive File** section of the **Backup/Restore System Settings** page, click .
- 3 Select the archive file to upload and click **Open**.
- 4 Click **Restore from Backup Archive**.
- 5 Ensure the **Restore Network Settings** option is selected.
Two warnings appear about the backup process. The second warns that the process is irrevocable and may result in an usable system.
- 6 Click **OK**.
The system uses the archive file to restore the system to the state of the backup files.

Upgrade Systems to the Latest Software Version

Upgrade your systems to the latest software version. Follow the instructions in the online help or Operations Guide for your product to upgrade the software. Refer to the product release notes for the recommended upgrade path.

Add Licenses to the Systems

After restoring data to the systems and upgrading the system software, you must activate the license keys included with the server shipment and license the newly installed systems.

Add Licenses to the RealPresence DMA System

Perform the following tasks to license the RealPresence DMA system.

To request a software activation key code for the server

- 1 Log into the Polycom RealPresence DMA system as an administrator and go to **Admin > Local Cluster > Licenses**.
- 2 Record the serial number for the Polycom RealPresence DMA server.
- 3 Go to <http://www.polycom.com/activation>.
- 4 If you don't already have one, register for an account. Then log in.
- 5 Select **Licensing & Product Registration > Activation/Upgrade**.
- 6 A product chooser dialog appears.
- 7 Select **All other Polycom Products**.
- 8 Select **SITE & Single Activation / Upgrade**.
- 9 In the **Serial Number** field, enter the serial number (which you recorded in step 2).
- 10 In the **License Number** field, enter the software license number listed on the server's License Certificate (shipped with the product).
- 11 Click **Generate**.
- 12 In the **Upgrade** tab, click **Get** to retrieve the key code for the version of software your system is currently running.
- 13 Record the key code.

To enter the license activation key code

- 1 Go to **Admin > Local Cluster > Licenses**.
- 2 In the **Activation key** field, enter the activation key code that was generated for that server's serial number.
- 3 Click **Update**.
- 4 A dialog informs you that the licenses have been updated.
- 5 Click **OK**.

License the RealPresence Resource Manager system

Follow these steps to license the RealPresence Resource Manager system.

To request a software license file

- 1 In a separate browser page or tab, log into the RealPresence Resource Manager system server as an administrator.

- 2 Go to **Admin > Server Settings > Licenses** and record the RealPresence Resource Manager system server serial number.
- 3 Go to <http://support.polycom.com>.
- 4 In the **Licensing & Product Registration** section, select **Activation/Upgrade**.
- 5 Log in or Register for an Account.
- 6 Select **Site & Single Activation/Upgrade**.
- 7 In the **Site & Single Activation** page, enter the serial number you recorded in step 2.
- 8 Click **Next**.
- 9 Accept the **EXPORT RESTRICTION** agreement.
- 10 In the new **Site & Single Activation** page, enter the serial number listed on your License Certificate and enter the license number (shipped with the product) and click **Activate**.
- 11 Ensure that you select the license for the current version of software the system is running.
- 12 In the **Key Code** field, click **click here to download** to retrieve and save your license file.

To update the license file

- 1 Go to **Admin > Server Settings > Licenses**.
- 2 Click **Update License** to view the **Update License** dialog.
- 3 Click **Choose File** to navigate to the license file you received from Polycom.
- 4 Click **Preview** to preview the license features.
- 5 On the **Update License** dialog, click **Update**.
- 6 You must log out of the system and log back in to view any new licensed features.

Migrate to the Existing RealPresence Video DualManager 400 Server

If your RealPresence Video DualManager system is based on the Polycom Rack Server 620 platform, you can install the RealPresence DMA system software on the server and Polycom Rack Server 220 system for the RealPresence Resource Manager installation.

If instead your RealPresence Video DualManager system is based on the Dell R610 system server, you must use two Polycom Rack Server 220 (R220) systems for migration, and follow the steps outlined in [Migrate to Two Polycom Rack Server 220 \(R220\) Systems](#).

This section guides you through migration to the existing Polycom Rack Server 620 (R620), for the RealPresence DMA system, and a Polycom Rack Server 220 (R220), for the RealPresence Resource Manager system. Once you complete this section, you will be ready to test your migrated systems to ensure they function as expected, and finish any remaining configuration.

This section contains the following topics:

- [Verify Shipment Contents](#)
- [Unpack and Install the Hardware](#)
- [Prepare the USB Flash Drive](#)
- [Install System Software](#)
- [Restore System Data](#)
- [Upgrade Systems to the Latest Software Version](#)
- [Add Licenses to the Systems](#)

Verify Shipment Contents

Before beginning migration, you need to verify that the Polycom Rack Server 220 (R220) hardware shipment is complete. Polycom Rack Server shipments include the server and other contents. You should verify the type of server and other contents of your shipment when you unpack the system. As noted in the following table, some items may arrive in a separate shipment.

Item	Description
1 Polycom Rack Server	Included
2 system DVDs (RealPresence DMA System version 6.1.2 software, RealPresence Resource Manager system version 8.2.2 software)	May be shipped separately

Item	Description
1 blank USB flash drive	Included
1 USB flash drive labeled Diagnostics that contains server diagnostics utilities. Use these utilities only under the direction of Polycom Global Services.	Included
Power cord(s)	May be shipped separately
Rail kit	Static rails
Bezel with Polycom badge	Included
RealPresence Resource Manager system, Appliance Edition, and RealPresence DMA system, Appliance Edition license and activation keys	May be shipped separately
Polycom warranty letter	Included
Product Information Guide	Included

Unpack and Install the Hardware

Follow these steps to unpack and install the Polycom Rack Server 220 (R220) server.

To unpack and install the hardware

- 1 Examine the shipping container 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.
- 2 Open and review the container packing slips.
- 3 Open the container and examine the contents for damage.
If you find damage, file a claim with the delivery carrier. Keep all shipping materials in case you need them later.
- 4 Unpack your system and identify each item.
A single-server Polycom Rack Server 220 (R220) shipment includes the items listed in Shipment Contents.
- 5 Assemble the rails and install the server in the rack.
To rack-mount a server, see the following instructions:
<http://www.dell.com/support/home/us/en/04/product-support/product/poweredge-r220/manuals>
- 6 Connect the server's power cable(s) to the server and connect a VGA cable from the server to the monitor.

- 7 Connect all power cables into a grounded electrical outlet or separate power source, such as an uninterruptible power supply (UPS) or power distribution unit (PDU).
- 8 Connect a monitor and keyboard to the server.
- 9 Press the power button on the server and on the monitor.
The power indicators should light.
- 10 Create one access password for the system BIOS.
- 11 Set the correct system time in the system BIOS.
- 12 Install the bezel (optional).
- 13 Connect the **Port 0** Ethernet port to the enterprise network.
The **Port 0** Ethernet port is the eth0 network interface, which must be used for this purpose.

Prepare the USB Flash Drive

You must prepare the USB flash drive included in the server package using the Polycom RealPresence DMA USB Configuration Utility (available in the /usb-gui directory of the system recovery disc and at support.polycom.com). This allows you to configure the Polycom RealPresence DMA system, Appliance Edition server with the USB flash drive during migration.

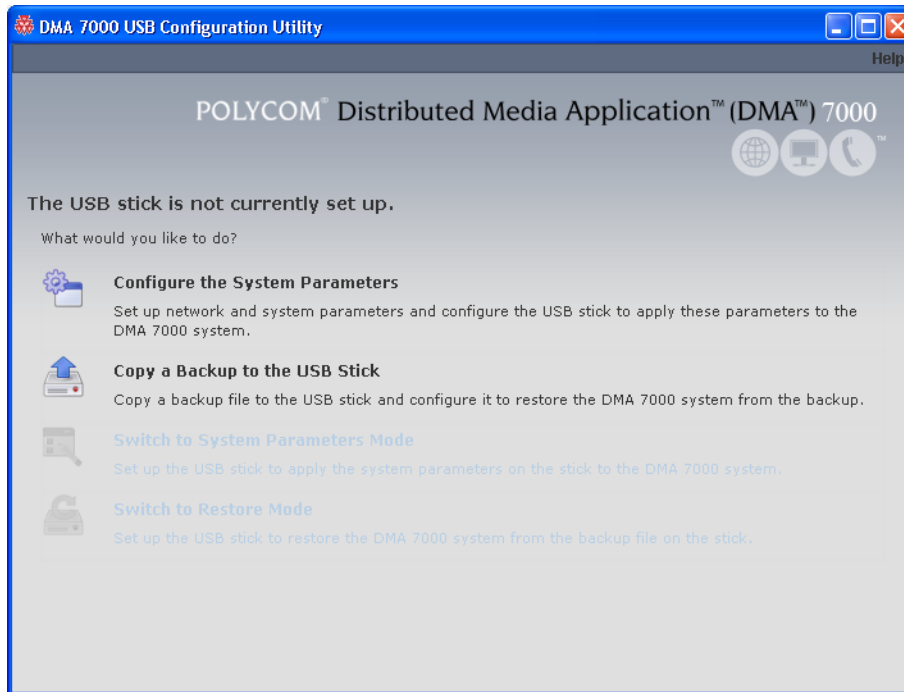


Caution: Use the latest version of the RealPresence DMA USB Configuration Utility

For compatibility reasons, ensure that you use the latest version of the RealPresence DMA system USB Configuration Utility.

To prepare the USB flash drive using the USB Configuration Utility

- 1 Connect the blank USB flash drive to the Windows PC on which you put the ZIP file containing the Polycom RealPresence DMA system USB Configuration Utility.
Note that the USB Configuration Utility files must be at the root of the drive, not in a folder. One of the files is autorun.inf, which enables the USB Configuration Utility to start automatically when the USB flash drive is inserted into a PC that supports autorun. In a highly secure environment, this file may not be allowed.
- 2 Unzip the Polycom RealPresence DMA USB Configuration Utility files to the USB flash drive.
- 3 Start the USB Configuration Utility by double-clicking `dma7000-usb-gui.exe`.
- 4 In the **USB Configuration Utility** window, click **Configure the System Parameters**.



- 5 On the **Network** page, select the **System IP type**, **System server configuration**, and **System split network setting** that you specified on the [RealPresence DMA system First-Time Setup Worksheet](#). Note that the settings you choose for these items determine which of the remaining network value fields are enabled. For instance, when you specify a single-server configuration, the Server 2 fields are disabled.
- 6 Enter the network values from the [RealPresence DMA system First-Time Setup Worksheet](#).
If you need to set up a special network routing rule or rules, click **Routing Configuration**, create the rule(s), and click **OK**. In the usual combined network configuration, routing rules are generally not necessary. In a split network configuration, routing rules are necessary for proper routing of network traffic. If you are not sure what rule or rules you need, consult the appropriate IT staff or network administrator for your organization.
- 7 Click **Next**.
- 8 On the **System Time** page, select the correct **System time zone** for your location.
Polycom recommends that you select the best location-specific setting, not one of the generic GMT offset settings. The location-specific settings automatically include the correct daylight saving time adjustments (if any) for that location and will be updated as locales change their time policies in the future.
- 9 Under **NTP servers**, enter the IP addresses (or domain names) for the time servers from the [RealPresence DMA system First-Time Setup Worksheet](#).
Polycom recommends 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.
- 10 Click **Done**.
The utility confirms that the configuration file was created and returns you to the initial menu.

- 11 Verify that **The USB stick is set to apply system parameters** is displayed in the initial menu, as shown next.



- 12 Close the program.
- 13 On your PC, eject the USB flash drive. When a message tells you it's safe to do so, disconnect the USB flash drive from the PC.

Install System Software

You can now install the RealPresence DMA system software, version 6.1.2, and the RealPresence Resource Manager software, version 8.2.2 on the new servers. You can install the software on each server at the same time.

Install RealPresence DMA System Software

Follow these steps to install version 6.1.2 RealPresence DMA system software on the existing RealPresence Video DualManager 400 system server.

To install the RealPresence DMA system software

- 1 Turn on the RealPresence Video DualManager 400 system server and insert the RealPresence DMA system software DVD included with the server shipment.
- 2 Restart the system server.
The server boots from the DVD, and the installation starts. Installation takes approximately 20-30 minutes, after which the DVD ejects and the server restarts twice.
- 3 Remove the DVD from the system server DVD drive.

- 4 Insert the USB flash drive you configured earlier into a USB port on the server.
- 5 Restart the system server.

After it boots, the server reads its network and system parameters from the USB flash drive and applies them.

Install RealPresence Resource Manager System Software

Follow these steps to install the RealPresence Resource Manager system software, version 8.2.2, onto the other server using the RealPresence Resource Manager system software DVD included with the server shipment.

To install the RealPresence Resource Manager system software

- 1 Turn on the server and insert the RealPresence Resource Manager system software DVD into the DVD drive.
- 2 Restart the system server.
The server boots from the DVD.
- 3 At the system prompts, configure the following settings for your system and press Enter after you complete each setting.

Do not accept the default network settings. Change the default settings to match the settings of the RealPresence Resource Manager system instance you are migrating from.

Prompt	Default Setting
Enter the Polycom RealPresence Resource Manager system host name	PLCM_RPRM
Enter the system domain name	
Enter the system host IP address	192.168.1.254
Enter the netmask for the system	255.255.255.0
Enter the Default Gateway for the system	192.168.1.1
Enter a DNS for the system	192.168.1.100
Enter the profile type	2

- 4 Press Enter to start the installation process.
Installation takes approximately 15 minutes, after which the DVD ejects and the server restarts.

Restore System Data

You can now restore the data you previously backed up to the newly installed systems.

Restore RealPresence DMA System Data

Perform the following tasks to restore data to the RealPresence DMA system.


To restore the backup archive

- 1 Go to **Maintenance > Backup and Restore**.
- 2 Select the backup file from which you want to restore.
- 3 In the **Actions** list, click **Restore Selected**.
- 4 The **Confirm Restore** dialog appears.
- 5 Read the warning, make sure that you want to continue, select all **System Backup Components** options, and click **OK**.
After a short delay, a dialog informs you that the system is going to be restored and you'll be logged out.
- 6 Click **OK**.
The system logs you out and the server reboots.
- 7 Log back in as a local **admin** user and:
 - a Go to **Maintenance > Software Upgrade** and check the **Operation History** table.
 - b If the system was integrated with Active Directory, go to **Admin > Integrations > Microsoft Active Directory** and re-enable the integration.

Restore RealPresence Resource Manager System Data

Perform the following tasks to restore data to the RealPresence Resource Manager system.

To restore the backup archive

- 1 Go to **Admin > Maintenance > Backup/Restore System Settings**.
- 2 In the **Select Archive File** section of the **Backup/Restore System Settings** page, click .
- 3 Select the archive file to upload and click **Open**.
- 4 Click **Restore from Backup Archive**.
- 5 Ensure the **Restore Network Settings** option is selected.
Two warnings appear about the backup process. The second warns that the process is irrevocable and may result in an usable system.
- 6 Click **OK**.
The system uses the archive file to restore the system to the state of the backup files.

Upgrade Systems to the Latest Software Version

Upgrade your systems to the latest software version. Follow the instructions in the online help or Operations Guide for your product to upgrade the software. Refer to the product release notes for the recommended upgrade path.

Add Licenses to the Systems

After restoring data to the systems and upgrading the system software, you must activate the license keys included with the server shipment and license the newly installed systems.

Add Licenses to the RealPresence DMA System

Perform the following tasks to license the RealPresence DMA system.

To request a software activation key code for the server

- 1 Log into the Polycom RealPresence DMA system as an administrator and go to **Admin > Local Cluster > Licenses**.
- 2 Record the serial number for the Polycom RealPresence DMA server.
- 3 Go to <http://www.polycom.com/activation>.
- 4 If you don't already have one, register for an account. Then log in.
- 5 Select **Licensing & Product Registration > Activation/Upgrade**.
- 6 A product chooser dialog appears.
- 7 Select **All other Polycom Products**.
- 8 Select **SITE & Single Activation / Upgrade**.
- 9 In the **Serial Number** field, enter the serial number (which you recorded in step 2).
- 10 In the **License Number** field, enter the software license number listed on the server's License Certificate (shipped with the product).
- 11 Click **Generate**.
- 12 In the **Upgrade** tab, click **Get** to retrieve the key code for the version of software your system is currently running.
- 13 Record the key code.

To enter the license activation key code

- 1 Go to **Admin > Local Cluster > Licenses**.
- 2 In the **Activation key** field, enter the activation key code that was generated for that server's serial number.
- 3 Click **Update**.
- 4 A dialog informs you that the licenses have been updated.
- 5 Click **OK**.

License the RealPresence Resource Manager system

Follow these steps to license the RealPresence Resource Manager system.

To request a software license file

- 1 In a separate browser page or tab, log into the RealPresence Resource Manager system server as an administrator.

- 2 Go to **Admin > Server Settings > Licenses** and record the RealPresence Resource Manager system server serial number.
- 3 Go to <http://support.polycom.com>.
- 4 In the **Licensing & Product Registration** section, select **Activation/Upgrade**.
- 5 Log in or Register for an Account.
- 6 Select **Site & Single Activation/Upgrade**.
- 7 In the **Site & Single Activation** page, enter the serial number you recorded in step 2.
- 8 Click **Next**.
- 9 Accept the **EXPORT RESTRICTION** agreement.
- 10 In the new **Site & Single Activation** page, enter the serial number listed on your License Certificate and enter the license number (shipped with the product) and click **Activate**.
- 11 Ensure that you select the license for the current version of software the system is running.
- 12 In the **Key Code** field, click **click here to download** to retrieve and save your license file.

To update the license file

- 1 Go to **Admin > Server Settings > Licenses**.
- 2 Click **Update License** to view the **Update License** dialog.
- 3 Click **Choose File** to navigate to the license file you received from Polycom.
- 4 Click **Preview** to preview the license features.
- 5 On the **Update License** dialog, click **Update**.
- 6 You must log out of the system and log back in to view any new licensed features.

Migrate to Virtual Edition Systems

You can migrate to two Virtual Edition systems. RealPresence Platform Director is required for this migration path. There is no need to upgrade the RealPresence Video DualManager 400 system instances before you begin migration.

This section contains the following topics:

- [Install the RealPresence Platform Director System](#)
- [Install the Virtual Edition Software](#)
- [Restore System Data](#)
- [Upgrade Systems to the Latest Software Version](#)

Install the RealPresence Platform Director System

The RealPresence Platform Director is included with all Virtual Edition products and is available at Polycom's support site for download.

Virtual Editions of Polycom RealPresence Platform products such as RealPresence DMA system require the RealPresence Platform Director system to manage licensing.

For complete instructions on how to use the RealPresence Platform Director system, see the *RealPresence Platform Director System Getting Started Guide*.

Install the Virtual Edition Software

You can install your Virtual Edition software either with your native tools or with the RealPresence Platform Director system, depending on your environment.

If your RealPresence Platform Director system was installed in a VMware vCenter environment with the required credentials, you can use the RealPresence Platform Director system to deploy Polycom software. For complete instructions on how to use the RealPresence Platform Director system see the Polycom RealPresence Platform Director Administrator Guide.

Refer to your product's Getting Started Guide for host requirements for installation.

Install the RealPresence DMA Virtual Edition System Software, Version 6.1.2

Depending on your environment, you can choose from the following installation methods:

- Install RealPresence DMA, Virtual Edition Software with Your Virtual Environment Tools
- Install the RealPresence DMA System Software Using the RealPresence Platform Director System

Install the RealPresence DMA System Software Using Your Virtual Environment Tools

If you install the RealPresence DMA, Virtual Edition, version 6.1.2 system software using your virtual environment tools, you will still need to use the RealPresence Platform Director system to manage licensing of your Polycom software.

To install the RealPresence DMA system using your virtual environment tools

- 1 Refer to the documentation for your virtual environment tools for instructions on installing a virtual instance.
- 2 Install a version 6.1.2 instance of the RealPresence DMA, Virtual Edition.
- 3 Assign a static IP address to the instance using the console. Use the same IP address that the RealPresence DMA system instance used. See [Assign a Static IP Address](#).
- 4 Add the instance to the RealPresence Platform Director system. See the *RealPresence Platform Director Administrator Guide* for details.

Install the RealPresence DMA System version 6.1.2 Software Using the RealPresence Platform Director System

If your RealPresence Platform Director system was installed in a VMware vCenter environment with the required credentials, you can use the RealPresence Platform Director system to deploy Polycom software. For complete instructions on how to use the RealPresence Platform Director system see the *Polycom RealPresence Platform Director Administrator Guide*.

To install the RealPresence DMA System Software Using the RealPresence Platform Director System

- » Install a version 6.1.2 instance of the RealPresence DMA, Virtual Edition, according to the instructions in the *Polycom RealPresence Platform Director Administrator Guide*.

Assign a Static IP Address

The RealPresence DMA system requires the same static IP address for your system's instance that was being used by the RealPresence DMA system instance when running on the RealPresence Video DualManager 400 system. You must assign the static IP with the console before continuing migration. If your VM environment has a DHCP server, it will assign an IP address to the instance. You must then assign the static IP using the console or assign the static IP from the RealPresence DMA system's web interface during initial configuration.

To assign a static IP address manually

- 1 In the VM client, select the instance you installed.
- 2 Select the **Console** tab.
- 3 Click in the console window, press **Enter** if necessary to see the login prompt, and log in with user ID **polycom** and password **polycom**.

**Note: Password characteristics**

The first time you log in to the restricted console, you are required to change the password for the **polycom** account. Use a password with the following characteristics:

- At least 6 characters in length
- Not a dictionary word
- Not a palindrome (spelled the same forward and backward)
- Not simply a case change of the previous password
- Not a letter rotation of the previous password (**polycom** -> **mpolyco**)

- 4 Change the password for the **polycom** account, following the above password guidelines.
A shell interface appears that enables you to assign an IP address.
- 5 Follow the prompts and assign the IP address previously used by the RealPresence DMA system instance when running on the RealPresence Video DualManager 400 system.
The system restarts some services and ends your console session.
- 6 Press **CTRL + ALT** to release the cursor from the console.
- 7 Close the console window.

Install the RealPresence Resource Manager Virtual Edition System Software, version 8.2.1

Install RealPresence Resource Manager, Virtual Edition, version 8.2.1 software. Depending on your environment, you can choose from the following installation methods:

- Install RealPresence DMA, Virtual Edition Software with Your Virtual Environment Tools
- Install the RealPresence DMA System Software Using the RealPresence Platform Director System

Install the RealPresence Resource Manager System Software Using Your Virtual Environment Tools

If you install the Polycom RealPresence Resource Manager, Virtual Edition, using your virtual environment tools, you will still need to use the RealPresence Platform Director system to manage licensing of your Polycom software.

To install the Polycom RealPresence Resource Manager system using your virtual environment tools

- 1 Refer to the documentation for your virtual environment tools for instructions on installing a virtual instance.
- 2 Install an instance of the Polycom RealPresence Resource Manager, Virtual Edition.
- 3 Assign a static IP address to the instance using the console. Use the same IP address that the RealPresence Resource Manager system instance running on the RealPresence Video DualManager 400 system used. See [Assign a Static IP Address](#).
- 4 Add the instance to the RealPresence Platform Director system. See the *RealPresence Platform Director Administrator Guide* for details.

Install the RealPresence Resource Manager System Software Using the RealPresence Platform Director System

If your RealPresence Platform Director system was installed in a VMware vCenter environment with the required credentials, you can use the RealPresence Platform Director system to deploy Polycom software. For complete instructions on how to use the RealPresence Platform Director system see the *Polycom RealPresence Platform Director Administrator Guide*.

To install the RealPresence Resource Manager System Software Using the RealPresence Platform Director System

- » Install an instance of the RealPresence Resource Manager, Virtual Edition, according to the instructions in the *Polycom RealPresence Platform Director Administrator Guide*.

Assign a Static IP Address

The RealPresence Resource Manager system requires the same static IP address for your system's instance that was being used by the RealPresence Resource Manager system instance when running on the RealPresence Video DualManager 400 system. You must assign the static IP with the console before continuing migration. If your VM environment has a DHCP server, it will assign an IP address to the instance. You must then assign the static IP using the console or assign the static IP from the RealPresence Resource Manager system's web interface during initial configuration.

To assign an IP address to the system within your virtual environment tools

- 1 Power on the newly-installed VM.
- 2 Access the console.
- 3 Click in the console window, press **Enter** if necessary to see the login prompt, and log in with user ID **polycom** and password **polycom**.
A shell interface appears that enables you to configure the network.
- 4 Choose option 2 and follow the prompts to configure the initial network settings.
The system reboots.
- 5 Press **CTRL + ALT** to release the cursor from the console.
Then close the console window.

Restore System Data

You can now restore the data you previously backed up to the newly installed systems.

Restore RealPresence DMA System Data

Perform the following tasks to restore data to the RealPresence DMA system.

To restore the backup archive


- 1 Log in to the RealPresence DMA system web interface.
- 2 Go to **Maintenance > Backup and Restore**.

- 3 Select the backup file from which you want to restore.
- 4 In the **Actions** list, click **Restore Selected**.
- 5 The **Confirm Restore** dialog appears.
- 6 Deselect the **IP network, certificate, security and licensing configuration** option, but ensure the remaining options in this dialog are selected.
- 7 Read the warning, make sure that you want to continue, and click **OK**.
After a short delay, a dialog informs you that the system will be restored and you'll be logged out.
- 8 Click **OK**.
The system logs you out and the server reboots.
- 9 Log back in as a local *admin* user and:
 - a Go to **Maintenance > Software Upgrade** and check the **Operation History** table.
 - b Ensure the system is functioning properly.
 - c If the system was integrated with Active Directory, go to **Admin > Integrations > Microsoft Active Directory** and re-enable the integration, if necessary.

Restore RealPresence Resource Manager System Data

Perform the following tasks to restore data to the RealPresence Resource Manager system.

To restore the backup archive

- 1 Log in to the RealPresence Resource Manager system web interface.
- 2 Go to **Admin > Maintenance > Backup/Restore System Settings**.
- 3 In the **Select Archive File** section of the **Backup/Restore System Settings** page, click .
- 4 Select the archive file to upload and click **Open**.
- 5 Click **Restore from Backup Archive**.
Two warnings appear about the backup process. The second warns that the process is irrevocable and may result in an usable system.
- 6 Click **OK**.
The system uses the archive file to restore the system to the state of the backup files.

Upgrade Systems to the Latest Software Version

To complete the migration process, upgrade your systems to the latest software version. Follow the instructions in the online help or Operations Guide for your product to upgrade the software. Refer to the product release notes for the recommended upgrade path.