Polycom® Zero Touch Provisioning
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About This Guide

This guide describes steps on how to operate the Polycom® Zero Touch Provisioning (ZTP) solution while provisioning Polycom phones and video endpoints. This document also describes operations to perform device association without using the ZTP console.

Audience, Purpose, and Required Skills

The primary audience for this document are resellers or service providers responsible for managing the deployment of the ZTP solution.

- **Reseller**
  - Represents any company that delivers Polycom devices to end-users or customers.
  - Responsible for device associations, typically on behalf of a service provider.

- **Service Provider**
  - Represents any company offering VOIP services to subscribers. The service provider may either operate on its own network or may purchase VOIP network services from a carrier as a complete solution or white label service.
  - Responsible for creating and managing device profiles and optionally performing device association operations.

Terminology Used in this Guide

The following table introduces the terms and acronyms you will find in this provisioning guide.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>Any Polycom administrator.</td>
</tr>
<tr>
<td>Association</td>
<td>A relationship between a device and a profile. Associations are the primary mechanism by which configuration profiles are associated to devices within the ZTP solution.</td>
</tr>
<tr>
<td>Company</td>
<td>The company identifier for an entity that has access to the ZTP solution.</td>
</tr>
<tr>
<td>CPE</td>
<td>Customer Premise Equipment.</td>
</tr>
<tr>
<td>Device</td>
<td>A device configured to use ZTP. Typically, one or more devices are assigned to a Subscriber (customer) and are associated with a ZTP profile.</td>
</tr>
<tr>
<td>MAC Address</td>
<td>The unique number used to identify Ethernet devices. Use this number to track devices within the ZTP solution.</td>
</tr>
</tbody>
</table>
Terms and Acronyms Used in this Guide (continued)

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile</td>
<td>A set of configuration details created by a service provider. The profile name is used for device association operations and communicates “out of band” to people that need to associate devices to this profile.</td>
</tr>
<tr>
<td>Reseller</td>
<td>An organization that sells Polycom devices to end customers. This entity uses ZTP to associate devices to an appropriate configuration profile that has been set up by a service provider.</td>
</tr>
<tr>
<td>Service Provider</td>
<td>An organization that provides services to customers using Polycom devices. This entity uses ZTP to enable reseller partners to associate devices to a certain configuration profile.</td>
</tr>
<tr>
<td>Subscriber</td>
<td>An entity within ZTP that has one or more devices assigned to it. This entity is tracked by a reference ID created by the user when performing device associations.</td>
</tr>
<tr>
<td>ZTP</td>
<td>Zero Touch Provisioning</td>
</tr>
</tbody>
</table>

Get Help

For more information about installing, configuring, and administering Polycom products, refer to Polycom Support.

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.
Deploying the Zero Touch Provisioning Solution

The Zero Touch Provisioning (ZTP) solution is a cloud-based service designed to simplify the deployment of Polycom devices. Using the ZTP Console, you can create and manage provisioning profiles that enable your customers to install their own devices without the need of a supplier or skilled installer to deploy the phones. Most Polycom phones are configured to look for the ZTP server first when connected to a network that has outside access.

You can also use the ZTP solution to perform the following tasks on VoIP phones:

- Software updates.
- Set additional configuration parameters that simplify deployment such as a custom CA certificate for HTTPS provisioning.

The Polycom ZTP users can access the following services and components:

- An automated server available 24×7 that accepts requests from Polycom devices and provides an initial configuration of the product
- A partner web portal and API accessible by registered partners and channels that you can use to do the following:
  - Create configuration profiles
  - Associate devices to a configuration profile
  - Generate reports and query the status of devices associated with the ZTP solution

Browser Requirements

The Polycom ZTP server is compatible with the following browsers:

- Microsoft® Internet Explorer 9.0 or later
- Mozilla® Firefox® 22 or later
- Google Chrome™ 20 or later
- Apple® Safari® 6.04 or later
### Supported Polycom Video Endpoints

You can only provision video endpoints with a provisioning server address. Any provisioning profile must be provisioned on the final provisioning server.

<table>
<thead>
<tr>
<th>Device</th>
<th>Supported Software Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polycom® RealPresence® Group Series Systems manufactured after October 1, 2015</td>
<td>Version 5.0 or later</td>
</tr>
<tr>
<td>Polycom® RealPresence Debut™</td>
<td>Version 1.2.0 or later</td>
</tr>
</tbody>
</table>

### Supported Polycom Phones

You can use the ZTP server to provision the following Polycom phones:

<table>
<thead>
<tr>
<th>Device</th>
<th>Supported Software Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polycom® SoundPoint® IP conference phones</td>
<td>UC Software 4.0.8 or later</td>
</tr>
<tr>
<td>Polycom® SoundStation® IP conference phones</td>
<td>UC Software 4.0.8 or later</td>
</tr>
<tr>
<td>Polycom® VVX® business media phones</td>
<td>UC Software 4.0.8 or later</td>
</tr>
</tbody>
</table>

### Updating Software with the ZTP Server

You can use ZTP to deliver software updates for phones only and only during the initial provisioning. ZTP is designed to be used once for your initial device installation. It is not designed to be used for ongoing management of devices.

You cannot use ZTP to update software on video endpoints. These systems must use a provisioning server, such as RealPresence Resource Manager, to obtain software updates.

### Prerequisites for Deploying Devices Using ZTP

Before you deploy devices using ZTP, ensure that all of the following conditions are met:

- All devices have HTTP or HTTPS access to ztp.polycom.com. You may experience TLS connection issues if you use an http proxy at the customer location.
- No server address is configured in DHCP Option 66 or 160 on the local deployment network DHCP server. Ensure that the rtcconfig SRV record is not configured for DNS.
The following settings are configured on each device:

<table>
<thead>
<tr>
<th>Polycom Products</th>
<th>Settings</th>
</tr>
</thead>
</table>
| Phones and Video Endpoints | - Phones and video endpoints have a factory-installed device certificate. To find out if your phone model has a factory-installed device certificate, refer to Feature Profile 37148: Device Certificates on Polycom Phones.  
- The Provisioning Server Address field listed in the VOIP device menu system is Null. By default, this field is set to Null on all Polycom devices. |

| RealPresence Debut Systems | For RealPresence Debut systems configured manually using the web interface,  
- Ensure that the Provisioning Server Type is set to Polycom ZTP.  
- Do configure the DHCP Server Option with a server address. |

Launch the Polycom ZTP Console

Before you can set up devices, you must launch the Polycom ZTP console. Functions displayed along the console window vary depending on whether you are logged in as a service provider or a reseller.

To launch the Polycom ZTP console:

1. Open the Zero Touch Provisioning Support page on Polycom Support.
2. Enter the authenticated email address and password that you use to access other Polycom sites.
3. Click Log In.

ZTP Provisioning Process

ZTP Provisioning Server Discovery Process includes an automated method of communicating the provisioning server address to the device using a DHCP option.

1. The device uses DHCP to search for the ZTP server:
   - UCS Devices and RealPresence Debut: If DHCP provisioning server discovery is set on the device to Custom, Option 66, or Custom+Option 66 (the factory default), the device will look for a provisioning server address in DHCP or DHCP INFORM.
   - RealPresence Group systems: The device will look for the provisioning server address in DHCP record option 66.

2. The device searches for the ZTP server address:
   - UCS Devices and RealPresence Debut: The device will look for a statically configured provisioning server address (not 0.0.0.0 or Null).
   - RealPresence Group systems: The device will query DNS for the rtcconfig SRV record.
3 If ZTP is enabled, the device contacts the ZTP server.
4 The device or video endpoint requests its own MAC address from the ZTP server, and the endpoint and ZTP server establishes a mutually authenticated TLS connection.
5 The ZTP server delivers the configuration profile associated with the device.

Limitations

You may encounter the following limitations and workarounds while using ZTP:

- **Downgrade not supported for versions of RealPresence Group Series earlier than 5.0**
  Downgrading to a software version earlier than RealPresence Group Series 5.0 creates TLS certificate errors and causes ZTP to become non-operational.

- **Configuration file size**
  To avoid processing delays, the single configuration file is limited to a maximum of 1000 entries.
Configuration Profiles

You can create profiles by providing a central provisioning server address that automatically redirects multiple customer devices to your provisioning server and also manage configuration profiles and devices using the Profile Management function. This Profile Management function is available only when logged in as a service provider.

The Profile Management function enables service providers to perform the following operations:

- Create a Profile for Phones
- Create a Profile for RealPresence Group Series
- Create a Profile for RealPresence Debut
- Search for a Profile or Device
- Modify a Profile
- Delete a Profile

Create a Profile for Phones

You can create a profile to use for phones.

To create a profile for phones:

1. Launch the ZTP console and click Profile Management.
2. In the Profile Editor, fill in the following fields.

   If the details for the Provisioning Server Username, Provisioning Server Password, or Provisioning Server Address are already included in the configuration profile, leave the fields blank to avoid overriding the values in the configuration profile.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name</td>
<td>The name of the configuration profile that provisions the devices.</td>
</tr>
<tr>
<td>Vendor Model</td>
<td>Select Polycom_UCS_Device.</td>
</tr>
<tr>
<td>Upload File</td>
<td>Click Choose File to choose a configuration file associated with the configuration profile. Note: You must format this file according to the Polycom Unified Communications (UC) Software configuration file format.</td>
</tr>
<tr>
<td>Provisioning Server Address</td>
<td>The provisioning server address of the service provider from which you download the configuration file.</td>
</tr>
</tbody>
</table>
Create a Profile for RealPresence Group Series

You can create a profile to use for RealPresence Group Series systems. You cannot use the same profile for RealPresence Group Series endpoints as for RealPresence Debut systems.

**To create a profile for RealPresence Group Series systems:**

1. Launch the ZTP console and click **Profile Management**.
2. In the **Profile Editor**, fill in the following fields.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile Name</strong></td>
<td>The name of the configuration profile that provisions the devices.</td>
</tr>
<tr>
<td><strong>Vendor Model</strong></td>
<td>Select <strong>RealPresence_Group_Device</strong>.</td>
</tr>
<tr>
<td><strong>Provisioning Server Address</strong></td>
<td>The provisioning server address of the service provider from which you download the configuration file.</td>
</tr>
</tbody>
</table>
Create a Profile for RealPresence Debut

You can create a profile to use for RealPresence Debut systems. You cannot use the same profile for RealPresence Debut systems as for RealPresence Group Series endpoints.

To create a profile for RealPresence Debut systems:

1. Launch the ZTP console and click Profile Management.
2. In the Profile Editor, fill in the following fields.

   If a field is not listed in the following table, leave the field blank in the Profile Editor screen.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provisioning Server Username</td>
<td>The user name for authentication with the provisioning server.</td>
</tr>
<tr>
<td>Provisioning Server Password</td>
<td>The password used for authentication with the provisioning server.</td>
</tr>
<tr>
<td>Server Type</td>
<td>Select the server type from the drop down menu. The options available are CMA/RPRM, DMS and others.</td>
</tr>
<tr>
<td>Profile Name</td>
<td>The name of the configuration profile that provisions the devices.</td>
</tr>
<tr>
<td>Vendor Model</td>
<td>Select Polycom_UCS_Device.</td>
</tr>
</tbody>
</table>
   | Provisioning Server Address | The provisioning server address of the service provider from which you download the configuration file.  
                                | *Note:* Prepend https:// in the field.                                     
                                | You can enter the url in this field in the following format:              |
                                | https://rprm.vc.polycom.com                                                |
   | Provisioning Server Username | The user name for authentication with the provisioning server.               |
                                | *Note:* Prepend the domain name in the field before the user name.        
                                | You can enter the user name in this field in the following format:       |
                                | polycom/polyedge                                                          |
   | Provisioning Server Password | The password used for authentication with the provisioning server.          |

3. Click Add.
3  Click **Add**.

**Search for a Profile or Device**

You can search for profiles and devices to associate a configuration profile with one or more devices or to manage your profile and device associations.

**To search for a profile or device:**

1. Launch the Polycom ZTP console.
2. On the left navigation bar in the ZTP console, select **Find Operations**.
3. Enter search criteria in the fields as required.

<table>
<thead>
<tr>
<th><strong>Field Name</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>First name of the subscriber.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last name of the subscriber.</td>
</tr>
<tr>
<td>Reference ID</td>
<td>A unique identifier that helps you reference a profile association. You can reference one or more devices with this identifier.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Phone number of the subscriber.</td>
</tr>
<tr>
<td>City</td>
<td>City where the subscriber is located.</td>
</tr>
<tr>
<td>Serial Number</td>
<td>The serial number of the device. UC Software devices use the MAC address as the serial number.</td>
</tr>
<tr>
<td>Model</td>
<td>The device model.</td>
</tr>
<tr>
<td>MAC Address</td>
<td>The MAC address of the device.</td>
</tr>
<tr>
<td>Configuration Profile</td>
<td>The configuration profile is created by the service provider and contains parameters specific to the service provider network such as redirection URL or software version.</td>
</tr>
<tr>
<td>Device View</td>
<td>Enable this check box to display search results by device MAC address or serial number rather than the default Reference ID.</td>
</tr>
<tr>
<td>No. of Results Per Page</td>
<td>By default, 10 search results are displayed per page. The minimum number of search results per page is two.</td>
</tr>
<tr>
<td>Download Results</td>
<td>Enable this check box to save search results to a local file rather than viewing them on the screen. A dialog box prompts you to choose a location where the records are downloaded. The results are saved in CSV file that you can import into Microsoft Excel for better analysis.</td>
</tr>
<tr>
<td>Max Number of Entries</td>
<td>The number of search records you want to save to the file. By default, all records are saved.</td>
</tr>
<tr>
<td>Ignore Case</td>
<td>Enable this option to ignore capitalization during searching. (MAC addresses in the Device Info section are always in lower case.)</td>
</tr>
</tbody>
</table>
Modify a Profile

You can modify a configuration profile by changing the profile parameters.

To modify a profile:

1. Launch the ZTP console and click Profile Management.
2. Click the Profile Name of the configuration profile that you want to modify.
3. Edit any fields in the Profile Editor.
4. Click Modify.
Delete a Profile

You can delete a profile from the list of configuration profiles.

To delete a profile:

1. Launch the ZTP console and click Profile Management.
2. Click Delete (x) beside the profile you want to delete.
3. Click OK.
Manage Profile Associations

After creating the profiles you need, you must associate the profiles with devices. You can choose to associate one device at a time or do a bulk association.

You can manage the following tasks:

- Profile with a Single Device
- Associate a Profile with Multiple Devices
- Modify the Associated Device Properties
- Copy a Device Profile
- Change the Device Associated with a Profile
- Delete a Device from a Profile

Profile with a Single Device

You can associate one device with a profile.

To associate a profile with a single device:

1. Launch the ZTP console and click **Find Operations**.
2. Search for a device profile using the available fields.
3. In the **Search Results** screen, click on an entry under **Reference ID**.
4. Click **Add** to add a device one at a time.
5. In the Create page, enter the customer contact profile details in the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAC Address</td>
<td>The MAC address of the device.</td>
</tr>
<tr>
<td>Serial Number</td>
<td>The serial number of a device. For Bulk Associations, you can leave this field blank.</td>
</tr>
<tr>
<td>Vendor Model</td>
<td>• Polycom_UCS_Device for the UCS devices.</td>
</tr>
<tr>
<td></td>
<td>• Polycom Video Endpoint for RealPresence Group Series systems.</td>
</tr>
<tr>
<td></td>
<td>• Polycom_UCS_Device for RealPresence Debut systems.</td>
</tr>
<tr>
<td>Configuration Profile</td>
<td>You can leave this field blank for Bulk Associations.</td>
</tr>
<tr>
<td></td>
<td>Enter the name of the configuration profile that you want to associate with this device.</td>
</tr>
</tbody>
</table>
6 Click on **Click Here to Enter Vendor Extension** expand menu and enter the following fields:

**Per-device Vendor Extension fields**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click Here to Enter Vendor Extension</td>
<td>Click this option to expose and view available parameters for single devices. <strong>Note</strong>: Any settings you make in these fields override settings in the Configuration Profile.</td>
</tr>
<tr>
<td>SIP Server Address</td>
<td>The SIP registration server address.</td>
</tr>
<tr>
<td>Outbound Proxy Address</td>
<td>The IP address or URL/FQDN of the applicable SIP Outbound Proxy server.</td>
</tr>
<tr>
<td>Provisioning Server Address</td>
<td>The provisioning server address of the service provider from which you download the configuration file. As a shortcut, you can embed the port number, username, and password in the URL you enter in this field in the following format: protocol://username:<a href="mailto:password@hostname.domain.ca">password@hostname.domain.ca</a>:port/filepath/</td>
</tr>
<tr>
<td>Provisioning Server Username</td>
<td>The user name for authentication with the provisioning server.</td>
</tr>
<tr>
<td>Provisioning Server Password</td>
<td>The password used for authentication with the provisioning server.</td>
</tr>
<tr>
<td>Enable Provisioning Polling</td>
<td>None, Enable, or Disable.</td>
</tr>
<tr>
<td>SIP Authentication User ID</td>
<td>The user name of the SIP device.</td>
</tr>
<tr>
<td>SIP Authentication Password</td>
<td>The password of the SIP device.</td>
</tr>
<tr>
<td>Line Label</td>
<td>The line label that will display on the SIP device.</td>
</tr>
<tr>
<td>SIP Display Name</td>
<td>The name of the SIP device that you want to display.</td>
</tr>
</tbody>
</table>

7 Click on **Done**.

**Search for a Profile or Device**

**Associate a Profile with Multiple Devices**

You can associate multiple devices with a profile by creating and uploading a CSV file that contains your device information.

**To associate a profile with multiple devices:**

1. Launch the ZTP console click **Find Operations**.
2. Search for a device profile using the following fields:
3. In the **Search Results** screen, click on an entry under **Reference ID**.
4. Click **Bulk_Add** to add multiple devices.
5 In the **Bulk Profile Association** screen, click **Upload File** to upload the CSV file.

The file takes several minutes to upload depending on the number of profile associations it contains. The file uploads to ZTP and displays the Subscription Status screen.

**CSV Format**

Create a CSV file that contains your device information.

The data in each line should contain comma separated values without double quotes. Any optional values not entered should be identified by a pair of commas. You do not have to enter commas if you do not enter any vendor extension fields.

**Example Configurations**

This section provides five example associations. You can enter association separately or in a single CSV file.

**Association Examples are as follows:**

<table>
<thead>
<tr>
<th>Association Example Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000cafebabe,,,profile1</td>
<td>This CSV format is applicable for no serial number, vendor model and for vendor extension passed.</td>
</tr>
<tr>
<td>0000cafebabe,,Polycom_UCS_Device,profile1</td>
<td>This CSV format is applicable for no serial number and if vendor extension is passed.</td>
</tr>
<tr>
<td>0000cafe1234,0000CAFE1234,Polycom_UCS_Device,profile1</td>
<td>This CSV format is applicable if no vendor extension parameter is passed.</td>
</tr>
<tr>
<td>0000cafe1234,0000CAFE1234,Polycom_UCS_Device,profile1,19 2.168.1.178, 192.168.1.171</td>
<td>This CSV format is applicable if the vendor extension includes SIP Server Address and Outbound Proxy Address.</td>
</tr>
<tr>
<td>0000cafe1234,0000CAFE1234,Polycom_UCS_Device,profile1,19 2.168.1.178,,user,password</td>
<td>This CSV format is applicable if the vendor extension includes SIP Server Address, provisioning server, user name and provisioning server password.</td>
</tr>
</tbody>
</table>

**Subscription Status of CSV file**

After uploading the file to ZTP, you can check the subscription status of processing the multiple device associations until the status changes.

**To check the subscription status:**

1. Launch the ZTP console and click **Find Operations**.
2. Search for a **Reference ID**, and click the **Details** link for a record.
3. ZTP provides the following status details in the **Detailed Subscriber Information** screen:
   - **Completed**- Processing has completed successfully.
Completed with Errors - Processing has completed but with errors.

You can click on the Completed with Errors link to display a file that lists the errors encountered in one or more records. You must correct these errors and reupload the file entries.

Modify the Associated Device Properties

You can use ZTP to modify the configuration profile of a device or properties of that profile. This is useful when updating the phone to a new location.

To modify the device properties:

1. Launch the ZTP console and click Find Operations.
2. Search for a device association using the following fields:
3. In the Search Results screen, click on an entry under Reference ID.
4. In the Modify Service or Package window, click on the MAC address of the device you want to modify.
5. Modify any of the device properties and click Done.
6. Click OK.

Copy a Device Profile

You can copy the profile of an existing device to a new device without having to enter a new configuration profile.

To copy a device profile:

1. Launch the ZTP console and click Find Operations.
2. Search for a device profile using the available fields.
3. In the Search Results screen, click on an entry under Reference ID.
4. Locate the device you want to copy by MAC address and click Copy.
5. Enter the details in the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAC Address</td>
<td>MAC Address of the device.</td>
</tr>
<tr>
<td>Serial No.</td>
<td>Serial number of the device.</td>
</tr>
</tbody>
</table>

6. Click Done.
Change the Device Associated with a Profile

You can interchange the devices associated with different configuration profiles.

To change the device associated with a profile:
1. Launch the ZTP console and click **Find Operations**.
2. Search for a profile or device association using the available fields.
3. In the **Search Results** screen, click on the **Reference ID**.
4. Locate the MAC address or Device ID of the device you want to change or swap and click **Change**.
5. Enter the details in the following fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAC Address/Device ID</td>
<td>MAC Address of the device.</td>
</tr>
<tr>
<td>New MAC Address/Device ID</td>
<td>New MAC Address of the device.</td>
</tr>
<tr>
<td>Serial No.</td>
<td>Serial number of the device.</td>
</tr>
</tbody>
</table>

6. Click **Done**.

Delete a Device from a Profile

You can delete one or more devices from a profile.

To delete a device:
1. Search from a profile or device association using the available fields:
2. In the **Search Results** screen, click **Reference ID**.
3. Locate the device you want to delete by MAC address, and click **Delete (x)**.
4. Verify the details and click **Done**.
Troubleshooting ZTP Issues

These are troubleshooting tips for ZTP users and are intended primarily for Polycom and partner support personnel.

You can use the following strategies to troubleshoot ZTP:

- The ZTP Web console.
- The device user interface if you have access to the device.

If ZTP is not functioning properly for video endpoints, the system will automatically go through the normal out-of-box wizard.

Identifying Provisioning Issues

There might be an issue with your provisioning if you observe any of the following scenarios:

- The phone does not show a registration icon on the display screen that remains idle.
- The time and date display is flashing, indicating the phone did not get a valid time setting.
- The line key label displays as SoundPoint IP, as shown in the following illustration.

There are a number of ways to troubleshoot ZTP provisioning issues.

- If ZTP is disabled on the device:
  - The software running on the phone might not support ZTP.
  - Ensure that ZTP is enabled on the device.
- If the device could not contact the ZTP server:
Ensure that the device has internet access to https://ztp.polycom.com.

- If Mutual TLS authentication fails:
  - Ensure that the device has a Polycom factory-installed certificate.
  - There can be an issue getting the system time, which caused the phone to reject the server certificate.
- If the device association is partial or not correctly applied:
  - Ensure that the device is associated with a configuration profile.
  - Ensure that the profile for the device is correct.

Troubleshoot Issues Using the ZTP Console

You can use the ZTP console to identify and resolve provisioning issues.

To troubleshoot using the ZTP console:

1. Obtain the MAC address of the device you are troubleshooting. If you do not know the MAC address, the end user can locate the MAC address of a Polycom device in one of two ways:
   - On a label on the back of the device. The MAC address is a hexadecimal number located on the bar code label, directly above the bar code, in the following format: 00:04:f2:00:00:01.
   - Navigate to the Polycom device:
     ◆ If you are using a SoundPoint IP or VVX device, go to Menu > Status > Platform > Phone. The MAC address is in the Serial Number (S/N) field.
     ◆ If you are using a SpectraLink device, navigate to Settings > Status > Platform > Phone. The MAC address is in the MAC field.
2. Once you have the MAC address, log in to the ZTP console and click Find Operations.
3. Check Device View, and enter the MAC address of the device into the MAC Address field.
4. Click Search. The device details display in the Search Results screen.
   If your device search yields no search results, then the device association was not performed correctly or was performed by someone outside of your company.
5. In the Search Results screen, view the Device ZTP Access Status field for the device you want to troubleshoot. This field can display any of the following details:
   - Last access time: This can indicate any of the following events:
     ◆ The last time the device contacted the ZTP server.
     ◆ The device contacted ZTP and downloaded at least one configuration file at the time indicated.
     ◆ If someone viewed a configuration file from the ZTP console.
     ◆ If the configuration file download failed due to an issue, for example, a failed TLS transaction or network issue.
   - Number of times accessed: indicates that an association exists, and how many times the device has contacted the ZTP server.
Troubleshooting ZTP Issues

- **Double-dashes (--)**: indicates that the device has not contacted the ZTP server.

Display of the **Device ZTP Access Status** field does not necessarily indicate that a device was properly associated with a profile.

**Device Not Able to Communicate with ZTP**

**Troubleshoot Issues Using a Device or Web Configuration Utility**

In addition to using the ZTP console to troubleshoot, you can also use either a device’s user interface, if you have access to it, or the Web Configuration Utility. There are a number of device fields you can use to verify that the device accessed ZTP during boot-up, which you can reset by rebooting the phone.

**To troubleshoot using the device interface:**

1. Navigate to **Menu > Settings > Advanced**, enter the password (default 456), and press **Enter**.
2. Navigate to **Admin Settings > Network Configuration > Provisioning Server**, and press **Select**.
   
   The **Server Address** field should be set to the provisioning server address. If the **Server Address** field is **Null**, then the ZTP did not find an association for the device.
3. Scroll down to the **ZTP** field.
   
   ZTP is automatically disabled each time the device accesses ZTP. If the ZTP field reads **Enabled**, then the device could not access ZTP.

**Troubleshoot Settings on the Device**

Before troubleshooting settings on the device, ensure that the ZTP is enabled.

**To troubleshoot settings on the device:**

1. To verify that ZTP is enabled on the device, navigate to **Menu > Settings > Advanced**, enter the password (default 456), and press **Enter**.
2. Select **Admin Settings > Network Configuration > Provisioning Server**, and press **Select**. Scroll down to **ZTP** and choose **Enabled**.
   
   Each time the device contacts ZTP, the ZTP field becomes disabled.

3. Verify that the **Boot Server** menu is set to **Static**.
4. On the **Provisioning Server** menu, do the following:
   
   a. Choose **DHCP Menu** and press **Select**.
   b. Set the **Boot Server** field to **Static**.
c  Press the Back soft key twice and choose Save Configuration.
5  Verify the information in the provisioning server Server Address field. If the Server Address field is Null, the device likely did not contact the ZTP server.

Search Results Not Displayed

If your device search yields no search results, then the device association was not performed correctly or was performed by someone outside of your company. If you used the Find Operations function to search for devices and no search results display:

- The MAC address might have been incorrectly entered during the association.
- The association was started but not fully completed. These partial associations are labeled Partial in the Subscriber Status field.

To search for partial associations:

1  Enter the MAC address of a device in the MAC Address field or enter the % character if you want to search for all partial associations. The % character is a wild card and will generate search results for all matches for that field.

2  In the Subscriber Status field, select partial.

    The Subscriber Status field is available to service providers. If you are logged in as a reseller, the Subscriber Status field will not be available and both partial and complete associations will be displayed for all searches.

    Partial associations, which display in the Subscriber Status field, are removed from the database after a few hours.

3  Click Search. The Search Results screen displays all partial device association.
4  Click Reference ID of a device.
5. Click OK. You must click OK to enter the device association to the ZTP database.

To find out whether the MAC address was entered incorrectly or the association is partial, return to the Find Operations screen and enter other information that identifies the device. For example, a customer name that was entered during the association.

If the association was performed by someone outside of your company, try to associate the device to a profile yourself. If the device has already been associated, you see a warning message. Contact Polycom Tech Support to resolve this issue.

Device Not Able to Communicate with ZTP

If the device is not able to establish a communication with ZTP, then do the following:

- Troubleshoot settings on the device
- Verify the VLAN settings
- Verify the device certificate

Verify that the Device has HTTP/HTTPS Access to ZTP

To check whether the device network allows access to the ZTP server, perform the following:

- Enter the URL http://ztp.polycom.com/000000000000.cfg. If the device can access the server, you should be able to view this configuration file. If you encounter an error, then it is likely that your network does not allow access to the ZTP server.

Verify the Security Certificates

The Mutual TLS transactions that enable the device and ZTP to communicate require that the device and server cross-validate security certificates. During this process, validation steps might fail and cause ZTP server communication to terminate. If this occurs:

- The phone might have failed the server certificate because the date is outside the validity range.
- If a time server is configured but not reachable, the certificate check is carried out and might fail. In this scenario the time and date displayed on the phone is inaccurate and flashes. The phone does not check the server certificate date validity if there is no time server configured either statically or in the Time Server DHCP Option.

You can also check if the certificate is installed on the device. The server rejects the connection if the device does not contain a factory installed device certificate.

To confirm whether a certificate is installed on the device:

» Navigate to Menu > Status > Platform > Phone, and scroll down to Device Certificate.
  ➢ The device certificate must be set to Factory Installed for the device to access ZTP. If the device certificate is set to Not Installed or Self-Signed, the device cannot access ZTP.

Even if the device cannot access ZTP, ZTP logs an access.
Troubleshooting ZTP Issues

➤ The Device Certificate field on devices that were updated to UC Software 4.0.0 and subsequently downgraded indicates Factory Installed even though the certificate might not have been installed. For more information on phone revisions that include factory installed device certificates, refer to Feature Profile 37148: Device Certificates on Polycom Phones.

Re-enabling ZTP on Devices

ZTP is automatically disabled after provisioning is complete. If for any reason you need to re-enable the ZTP option on a device, you can do so.

Enable/Disable the ZTP using the Phone’s Interface

You can enable or disable the ZTP option via the phone interface.

To enable or disable the ZTP on the phone:

2. Enter the phone password (default is 456).
3. Select Admin Settings > Network Configuration > Provisioning Server/Server Menu/ZTP.

Enable/Disable the ZTP using the Phone’s Configuration File

You can enable or disable the ZTP using the phone’s configuration file.

To enable or disable using configuration file:

» Locate the following parameters in either the device.cfg or site.cfg template configuration file, and set the value of each of the parameters to 1:

♦ device.set
♦ device.prov.ztpEnabled
♦ device.prov.ztpEnabled.set

For Video Endpoints, the ZTP is disabled and the endpoint remains connected to the provisioning server.

Reset ZTP on RealPresence Group Series

On RealPresence Group Series, verify that the device successfully provisions directly and then apply the same settings to the ZTP profile. The device must be able to contact ZTP properly once the RealPresence Group Series is system reset.

To perform a system reset on GS, access the system using a Telnet Client on port 24 and execute the following command:

resetsystem deletesystemsettings

This should reset the system and trigger an attempt to lookup the ZTP profile on the ZTP Server.
Reset ZTP on RealPresence Debut System

After configuring the RealPresence Debut system successfully, you must reset it as follows:

1. Reset the RealPresence Debut system through the WebUI in the following location: **>>Admin Settings>>Factory Reset>>Reset.**
2. Once the Debut system reboots, the language screen appears. Follow the steps to proceed through the out-of-box screens to **“Start to experience”**.
3. The RealPresence Debut system should reach out to the ZTP Server and download the ZTP Profile. If able to communicate with ZTP Server, the RealPresence Debut system reboots and is now provisioned.

Additional Troubleshooting Information

You can perform additional troubleshooting in the following methods:

- Restart the phone, repeat the steps in Launch the Polycom ZTP Console, and observe changes in **Device ZTP Access Status** field.
- Delete the profile association, perform the profile association again, and restart the device.
- Open and view the configuration file, and confirm that the settings match your expectations.

Troubleshoot Issues Using the ZTP Console

To view the configuration files:

1. Perform the steps in Launch the Polycom ZTP Console.
2. From the **Search Results** screen, choose a device and click on **Details**. The **Detailed Subscriber Information** screen displays.
3. Click on a blue configuration file icon to display the configuration parameters.
4. Confirm if the settings match the expectations. If the configuration settings do not match, navigate to **“Manage Configuration Profiles”** and review the settings in the **Profile Editor** on the **Profile Management** screen.