



MIGRATION GUIDE

Software 2.0.0 | August 2015 | 3725-03307-000A

# Polycom<sup>®</sup> RealPresence<sup>®</sup> CloudAXIS<sup>®</sup> Suite v1.7.0 to Polycom<sup>®</sup> RealPresence<sup>®</sup> Web Suite v2.0.0



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# Migrating from RealPresence CloudAXIS to RealPresence Web Suite

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Upgrading from RealPresence CloudAXIS Suite v1.7 to RealPresence Web Suite v2.0 is accomplished by deploying a new version of each portal and migrating the configuration settings and data from the current version of each portal to the new version. The migration procedure is slightly different for each portal. In addition, some tasks must be done manually. The sections that follow describe the entire process.



**Note: RealPresence CloudAXIS Suite must be at version 1.7**

Migration to RealPresence Web Suite v2.0 is supported only from RealPresence CloudAXIS Suite v1.7. Earlier versions must be upgraded to v1.7 first.

## Before You Begin

Before you start the upgrade process, make sure that the following requirements are met:

- The existing RealPresence CloudAXIS Suite v1.7 portals are fully configured, online, and functional.
- Both portals have valid CA-signed (not self-signed) certificates.
- In the administration interface of the existing Services Portal, the **PLATFORM SETTINGS > LICENSE** page shows that both it and the Experience Portal are properly licensed.
- You have an IP address available that can be temporarily assigned to the new v2.0 Services Portal when you later deploy it. (Alternatively, if DHCP is available, the new portal can temporarily use the IP address assigned to it via DHCP.)

Because the old Services Portal must remain running until after the new portal connects to it and retrieves its data, the new portal must have its own unique IP address until after the data migration.

- You have a record of the network and time settings for both existing portals.

After the data migration from the old portals, you can configure the new portals to use the old portals' network and time settings. Thus the existing FQDNs and migrated certificates work and the new portals' time is synchronized with your other RealPresence Platform components.

- You have a record of the login credentials for both the secure shell and the administration interface of both existing portals.

The migrations replace the user data on the new portals with the user data from the old portals.

- You have the URL and login credentials for the Polycom Licensing Center and the license activation keys for the new RealPresence Web Suite v2.0 licenses.

See the *RealPresence Web Suite v2.0 Release Notes* or contact Polycom Global Services for information on how to upgrade your RealPresence CloudAXIS Suite licenses to RealPresence Web Suite licenses.

- You have the *RealPresence Web Suite Getting Started Guide*, *RealPresence Web Suite Administrator Guide*, and if relevant to your environment, *RealPresence Platform Director Administrator Guide*.

The latter two provide detailed information about licensing the portals that is not duplicated here.



**Caution: Upgrade will fail if requirements are not met**

The preceding requirements must be met fully in order for the migration to RealPresence Web Suite v2.0 to succeed.

## Export Current v1.7 Experience Portal Settings

Experience Portal configuration settings are saved in its settings.json file. This file can be exported from the current Experience Portal server for later import into the new Experience Portal server. Do this first so that you can shut down the current Experience Portal; **it must be off** at later stages of the process.

**To export the current Experience Portal configuration file:**

- 1 In the administration interface of the current Experience Portal, go to **PLATFORM SETTINGS > MIGRATE**.
- 2 Enter your credentials.
- 3 Click **EXPORT**.  
The settings.json file is saved to the location you choose.
- 4 In your vSphere client or Hyper-V Manager, shut down the current v1.7 Experience Portal.

## Deactivate Current v1.7 System Licenses

You will be installing new RealPresence Web Suite license activation keys into the new RealPresence Web Suite v2.0 Services Portal, so you must deactivate the existing v1.7 licenses first. The procedure differs depending on whether this is a stand-alone system or licensed via RealPresence Platform Director, and whether you do so in online or offline mode.



**Note: Deactivation not necessary for RealPresence One**

If you have a RealPresence One solution subscription, license deactivation is not required.

**To deactivate the current system licenses of a stand-alone system in online mode:**

- 1 In the Services Portal, go to **PLATFORM SETTINGS > LICENSE**.
- 2 On the **LICENSE** page, click **Deactivate** next to each license, deactivating them in the following order:

- a All concurrent user licenses
- b Experience Portal license
- c Services Portal license

**To deactivate the current system licenses of a system in offline mode or licensed via RealPresence Platform Director:**

- 1 Log into the Polycom Licensing Center with your credentials.
- 2 On the left toolbar, click **Search Devices**, locate the device containing the licenses (RealPresence Platform Director, if applicable, or the RealPresence Web Suite Services Portal), and select it.
- 3 On the **View Device** page, click **Remove Add-Ons**, select all the CloudAXIS licenses, and click **REMOVE ADD-ONS**.
- 4 If deactivating in offline mode, click **Download Capability Response**.  
The response, a .bin file, is downloaded to your computer.
- 5 If deactivating an offline stand-alone system, go to the Services Portal **License** page, click **Deactivation**, and follow the prompts to upload the response file from the Polycom Licensing Center.
- 6 If deactivating via RealPresence Platform Director, go to its **License Setup** page and do one of the following:
  - Click **Online** if RealPresence Platform Director has access to the Internet.
  - Otherwise, click **Offline** and follow the prompts to upload the response file from the Polycom Licensing Center.
- 7 Click **UPDATE**.  
Deactivation may take a few minutes, and you may need to refresh the browser window.

## Retrieve Current v1.7 Services Portal Signed Certificate

You must copy the CA-signed webserver-own certificate from the current Services Portal so that you can upload it as a webserver-trust certificate to the new Services Portal later. This is necessary so that the new portal sees the current portal as a trusted server, allowing the data migration from the old portal to the new portal to take place.

**To retrieve the current Services Portal certificate:**

- 1 Log into the Services Portal with Super Admin credentials.
- 2 Go to **PLATFORM SETTINGS > CERTIFICATE > Certificate List**.
- 3 Click **VIEW** next to the webserver-own certificate.
- 4 Copy the entire certificate from **-----BEGIN CERTIFICATE REQUEST-----** through **-----END CERTIFICATE REQUEST-----** (include the leading and trailing dashes, but not anything preceding **-----BEGIN CERTIFICATE REQUEST-----**).
- 5 Paste the text into a text editor.
- 6 Save the file with the file extension **.crt** and verify that the file appears as a certificate file in your file manager.

# Deploy the New v2.0 Services Portal

Before migrating the configuration settings, obtain the v2.0 Services Portal software package for your virtual environment and deploy it.



**Note: Alternatively, use RealPresence Platform Director to deploy the new portal**

If you have RealPresence Platform Director in a vSphere environment with the proper permissions, you can use it to create the new v2.0 portal. Refer to the *RealPresence Platform Director Administrator Guide* for instructions.

## To deploy a new RealPresence Web Suite Services Portal:

- 1 Obtain the new Services Portal OVA or VHD file from the Polycom Support site.
- 2 Deploy the new Services Portal in your virtual environment as described in the *RealPresence Web Suite Getting Started Guide*.
- 3 Open the vSphere or Hyper-V Manager console for the new Services Portal's VM.
- 4 Log into the restricted shell using *polycom* as both your username and password. When prompted to do so, change the default password.
- 5 Enter **change\_network\_settings** and follow the prompts to assign a temporary IP address to the new portal. (Alternatively, if DHCP is available, the new portal can temporarily use the IP address assigned to it via DHCP.)  
  
After the old Services Portal is taken out of service, you can change this IP address to the old portal's IP address.
- 6 Enter **change\_ntp** and follow the prompts to specify the same NTP server as the old portal.
- 7 Enter **change\_timezone** and follow the prompts to specify the same time zone as the old portal.

## Migrate Current Settings to the New Services Portal

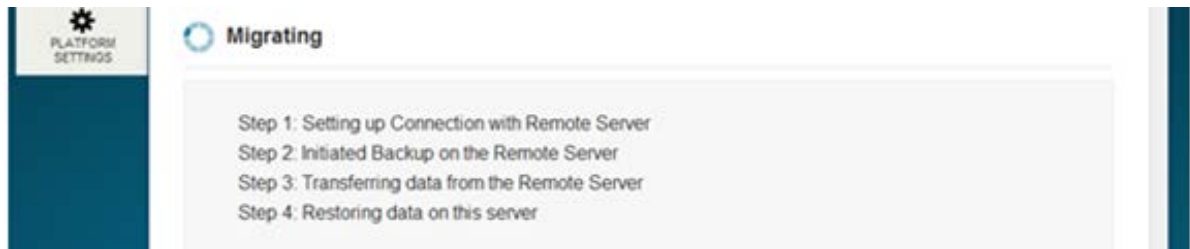
After deploying a new v2.0 Services Portal, you can use the migrate process to export settings from the old portal and import them into the new one. But first, you must upload the webserver-own certificate from the old portal as a webserver-trust certificate on the new portal. The new portal must trust the old portal in order for the migration process to work.

### To migrate current Services Portal settings to the new Services Portal:

- 1 Log into the new Services Portal as the default administrator *admin* with password *Polycom12#\$*. When prompted, change the password and accept the license agreement.
- 2 Go to **PLATFORM SETTINGS > CERTIFICATE > Upload Certificate**.
- 3 From the **Type** list, select **WebServer Trust**.
- 4 Click **Browse**, navigate to the certificate that you retrieved from the v1.7 portal, and click **UPLOAD**.
- 5 Go to **PLATFORM SETTINGS > MIGRATE**, and when prompted, enter your credentials.

- 6 Read the disclaimer on the Platform Migration page and click **YES** when you are ready to begin the migration.
- 7 On the **Remote system details** page, enter the **Hostname** (FQDN or IP address), **Admin User Name**, and **Password** of the old v1.7 Services Portal.
- 8 Click **MIGRATE**.
- 9 Wait for the user interface to indicate that the information from the old Services Portal was successfully imported.

After the data has been imported, additional configuration runs in the background before the Services Portal reboots. During these processes, the system displays the following.



Among the data imported from the old portal are its certificates and the user data, but not its network configuration.

- 10 After the new Services Portal has restarted, in your vSphere client or Hyper-V Manager, shut down the old v1.7 Services Portal.

**The old portal must be off** when you assign its IP address to the new portal. After you confirm that the new portal is configured correctly, you can remove the old portal permanently at your convenience.

## Change the Network Settings of the New Services Portal

Now that the new Services Portal has the configuration, data, and network settings of the old portal and the old portal has been shut down, you can configure the new portal to use the old portal's IP address so that the old portal's FQDN and certificates work for the new portal.

### To change the new portal's network settings:

- 1 Log into the secure shell as user *polycom* with the password you created when you logged into the shell after deployment.
- 2 If you previously assigned a temporary static IP address to the portal, enter **change\_network\_settings** and enable DHCP. After the system reboots, log back into the shell.  
This step is necessary because you cannot change directly from one static IP address to another.
- 3 Enter **change\_network\_settings** and follow the prompts to make the IP address and other settings match those from the old portal.
- 4 After the new Services Portal has restarted, log into its administration interface using the FQDN and Super Admin credentials **from the old Services Portal**.
- 5 Verify that the old portal's certificate was successfully migrated and that your browser reports a secure connection (the address bar shows `https://` and a padlock icon is displayed).

- 6 Verify other aspects of configuration to satisfy yourself that the migration was successful.

## Deploy the New v2.0 Experience Portal

You can now deploy the new v2.0 Experience Portal and configure its network and time settings to match those of the old v1.7 Experience Portal. Before you do, make sure that the old 1.7 portal is shut down.



**Note: Alternatively, use RealPresence Platform Director to deploy the new portals**

If you have RealPresence Platform Director in a vSphere environment with the proper permissions, you can use it to create the new v2.0 portals. Refer to the *RealPresence Platform Director Administrator Guide* for instructions.

### To deploy a new RealPresence Web Suite Experience Portal:

- 1 Obtain the new Experience Portal OVA or VHD file from the Polycom Support site.
- 2 Deploy the new Experience Portal in your virtual environment as described in the *RealPresence Web Suite Getting Started Guide*.
- 3 Open the vSphere or Hyper-V Manager console for the Experience Portal's VM.
- 4 Log into the restricted shell using *polycom* as both your username and password. When prompted to do so, change the default password.
- 5 Enter **change\_network\_settings** and follow the prompts to set its static IP address and other network settings to match those of the old portal.
- 6 Enter **change\_ntp** and follow the prompts to specify the same NTP server as the old portal.
- 7 Enter **change\_timezone** and follow the prompts to specify the same time zone as the old portal.

## Import Settings to the New Experience Portal

The settings.json file that you exported from the old Experience Portal contains all of the configuration settings and data from the old portal. You can configure the new portal by importing that file.

### To import the Experience Portal settings:

- 1 Log into the new Experience Portal as the default administrator *admin* with password *Polycom12#\$*. When prompted, change the password and accept the license agreement.
- 2 Go to **PLATFORM SETTINGS > MIGRATE**.
- 3 Enter your credentials.
- 4 Under **Import Configuration**, click **Choose File**, find the settings.json file that you exported from the old portal, and click **Open**.
- 5 Click **IMPORT** to upload the settings and data.
- 6 Go to **PLATFORM SETTINGS > RESTART > RESTART SERVICES** to apply the changes and restart the Experience Portal and its administrator interface.



- 7 After the new Experience Portal has restarted, log into its administration interface using the FQDN and Super Admin credentials **from the old Experience Portal** and verify that the settings are correct.



**Note: Add password for *ecsparticipant* user**

The settings.json file from a version prior to 2.0 does not contain the new built-in system user, *ecsparticipant*. As a result, the password for *ecsparticipant* remains blank. Be sure to enter the same password for *ecsparticipant* in both portals. The default is *ecsparticipant*, but you should change that for security reasons.

## License the New v2.0 System

Now that the v1.7 licenses have been deallocated, the old portals are out of service, and the new v2.0 portals are both running and configured properly, you can activate your v2.0 licenses. The process differs depending on whether this is a stand-alone system or in a RealPresence Platform Director environment. In the latter case, you must first remove the v1.7 instances from RealPresence Platform Director and add the v2.0 instances.



**Note: Adding is not necessary if RealPresence Platform Director created the portals**

If you used RealPresence Platform Director in a vCenter to create the new portals, they already exist in RealPresence Platform Director and you can skip step 3 in the following procedure.

### To add the new portals to RealPresence Platform Director and license them:

- 1 Gather the URL and login credentials for the Polycom Licensing Center, the license activation keys for the RealPresence Web Suite v2.0 licenses, and the *RealPresence Platform Director Administrator Guide*.
- 2 In RealPresence Platform Director, delete the old RealPresence CloudAXIS v1.7 portals as described under “Delete an Instance” in the *RealPresence Platform Director Administrator Guide*.
- 3 Add the new RealPresence Web Suite v2.0 portals as described under “Add an Existing Virtual Instance by IP Address” in the *RealPresence Platform Director Administrator Guide*.
- 4 Follow the procedure under “Upgrade the Licenses of Polycom RealPresence System Components” in the *RealPresence Platform Director Administrator Guide* to accomplish the following:
  - a In the Polycom Licensing Center, locate and view the RealPresence Platform Director license server, find your new RealPresence Web Suite licenses, and allocate them to RealPresence Platform Director.

For a standard migration, you should have a license for each portal plus one or more concurrent user licenses (labeled **50 SESS LIC** or **150 SESS LIC**). If you chose to upgrade to RealPresence Web Suite Pro, there should be an additional license labeled **ENHANCED CONTENT FEATURE**.

- b** To use offline mode, download the capability response file.
  - c** On the RealPresence Platform Director **License Setup** page, activate the licenses.
- 5** For counted (concurrent user) licenses, allocate them to the RealPresence Web Suite Experience Portal as described under “Allocate Licenses for Polycom RealPresence System Components.”

**To license the new portals as a stand-alone system:**

- 1** Gather the URL and login credentials for the Polycom Licensing Center, the license activation keys for the RealPresence Web Suite v2.0 licenses, and the *RealPresence Web Suite Administrator Guide*.
- 2** In the *RealPresence Web Suite Administration Guide*, find “Activate Licenses for a Stand-Alone RealPresence Web Suite” and follow the applicable procedures in that section to activate the licenses, depending on which of the following is the case:
  - The Services Portal has Internet access.
  - The Services Portal does not have Internet access.