



MIGRATION GUIDE

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Polycom Server Replacement



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Before You Begin

This document explains how to replace an existing Polycom server and migrate an existing system to the new server. It covers replacing servers for Polycom® RealPresence® DMA systems, Polycom® RealPresence® Resource Manager systems, and Polycom® RealPresence® Access Director systems.

Audience, Purpose, and Required Skills

Users of this document are expected to understand video conferencing and networking.

Get Help

For more information about installing, configuring, and administering Polycom products, refer to Documents and Downloads at [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.

Replacing a Standalone RealPresence DMA Server

When you replace a standalone RealPresence DMA server, you need to perform the steps included in this section in the order that they are provided.

- [Preparing the New Server](#)
- [Preparing the Production Server](#)
- [Configuring the New Server](#)

Preparing the New Server

Before you discontinue use of your production server, you need to prepare the new server for use.

For the new server, you will need to do the following:

- Install the server and software
- Ensure the server is running the same software version as the production server

Install the Hardware and Software

Follow the instructions in the System Installation chapter for the RealPresence DMA System Getting Started Guide for the respective RealPresence DMA version that you are installing.

You do not need to do any initial configuration for the server. Use the default IP and ensure that you can log onto the server.

Upgrade the Replacement Server to Same Software Version as the Current Server

Both the new server and the current server need to be running on the same version of RealPresence DMA software. If they are not already doing so, you'll need to upgrade the new server to the same version as the production server.

Review the RealPresence DMA System Operations Guide for instructions on how to upgrade your system.

Preparing the Production Server

On the production server, you will need to do the following:

- Create a backup file that you can use to configure the new server.
- Busy out the RealPresence DMA system and wait for all active calls to drop.
- Shut down the system.

Create a Backup File from the Production Server

You need to create a backup file from your production server. You will upload this backup file to the new server to automatically configure it to match the production server settings.

To create a backup file of the production server:

- 1 Go to **Maintenance > Backup and Restore**.
- 2 In the **Actions** list, click **Create New (Full)** to create a full backup file.
A confirmation dialog tells you that the backup archive was created. For a full backup, this process may take some time.
- 3 Click **OK**.
- 4 When it is complete, select the newly-created backup file from the list of backups.
- 5 In the **Actions** list, click **Download Selected**.
- 6 Choose a path and filename for the backup file and click **Save**. Be sure to choose a path that is accessible from both the production and new server.
The File Download dialog indicates when the download is complete.
- 7 Click **Close**.

Busy Out the Production System

As a best practice, you need to busy out the server and wait for active calls to drop. This ensures that any active calls do not abruptly end. When the server is busied out, it stops accepting new calls.

To busy out the RealPresence DMA system:

- 1 Go to **Network > DMAs**.
- 2 In the **Actions** list, click **Busy Out**.

Shut Down the Production System

The new server will be configured to use the same IP as the production system. You need to shut down the production system before bringing the new server online.

To shut down the RealPresence DMA system:

- 1 Go to **Maintenance > Shutdown and Restart**.
- 2 Click **Shutdown**.
- 3 Verify that all calls have stopped by going to **Dashboard > Call Server Active Calls**.

Configuring the New Server

You will configure the new server by uploading the backup file you created from the production server. When you do this, the new server will be configured with the same network settings and information as the production server.

Restore the Backup File to the New Server

You need to upload the backup file you created to the new server.

To restore the backup file to the new server:

- 1** Go to **Maintenance > Backup and Restore**.
- 2** Click **Upload** and navigate to the backup file you created from the production server.
- 3** Select the backup file you want to download.
The **File Upload** dialog indicates when the upload is complete.
- 4** Click **Close**.
The system asks if you want to restore now from the backup file you just uploaded.
- 5** To restore now, select all backup components and click **Now**.
The **Confirm Restore** dialog appears.
- 6** Read the warning, make sure that you want to continue, select which data you want to restore, 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.
- 7** Click **OK**.
The system logs you out and the server reboots (typically, this takes about five minutes).
- 8** Log back in as a local admin user.
- 9** Go to **Maintenance > Software Upgrade** and check the Operation History table.
- 10** If the system was integrated with Active Directory, go to **Admin > Integrations > Microsoft Active Directory** and re-enable the integration.
- 11** Verify that calls work as expected.

Replacing a Clustered RealPresence DMA Server

When you replace a clustered RealPresence DMA server, you need to perform the steps included in this section in the order that they are provided.

You can replace one or both of the servers within a cluster. The following steps are repeated for each server within the cluster.

- [Preparing the New Server](#)
- [Preparing the Production Server](#)
- [Configuring the New Server](#)

Preparing the New Servers

Before you discontinue use of your production servers, you need to prepare the new server(s) for use.

For each new server, you will need to do the following:

- Install the server and software
- Ensure the server is running the same software version as the production server
- Disconnect the replacement server(s) from the network

Install the Hardware and Software

Follow the instructions in the *RealPresence DMA System Getting Started Guide* for the respective RealPresence DMA system version that you are installing.

You must configure both replacement servers with IP addresses and host names. Be sure to complete the steps in the Initial Configuration chapter of the *RealPresence DMA System Getting Started Guide* for your version of software on [Polycom Support](#).

Upgrade the Replacement Server to Same Software Version as the Current Server

Both the new servers and the current servers need to be running on the same version of RealPresence DMA software. If they are not already doing so, you'll need to upgrade the new servers to the same version as the production server.

Review the *RealPresence DMA System Operations Guide* for your version of software on [Polycom Support](#) for instructions on how to upgrade your system.

Disconnect the Replacement Servers from the Network

Before continuing, disconnect your replacement servers from the network.

Preparing the Production Server

On the production server(s), you will need to do the following:

- Create a backup file as a precaution.
- Busy out the RealPresence DMA system you are replacing and wait for all active calls to drop.
- Shut down the system you are replacing.

Create a Backup File from the Production Server

As a best practice, you need to create a backup file from your production server before starting any server maintenance.

To create a backup file of the production server:

- 1 Log into the RealPresence DMA system using the Virtual IP address.
- 2 Go to **Maintenance > Backup and Restore**.
- 3 In the **Actions** list, click **Create New (Full)** to create a full backup file.
A confirmation dialog tells you that the backup archive was created. For a full backup, this process may take some time.
- 4 Click **OK**.
- 5 When it is complete, select the newly-created backup file from the list of backups.
- 6 In the **Actions** list, click **Download Selected**.
- 7 Choose a path and filename for the backup file and click **Save**.
The File Download dialog indicates when the download is complete.
- 8 Click **Close**.

Busy Out the Production System

As a best practice, you need to busy out the server and wait for active calls to drop. This ensures that any active calls do not abruptly end. When the server is busied out, it stops accepting new calls.

To busy out the RealPresence DMA system:

- 1 Go to **Network > DMAs**.
- 2 In the **Actions** list, click **Busy Out**.
- 3 Verify that all calls have stopped by going to **Dashboard > Call Server Active Calls**.

Shut Down the Production System You Want To Replace First

The new server will be configured to use the same IP as the production system. You need to shut down the production system before bringing the new server(s) online.

To shut down the RealPresence DMA system:

- 1 Go to **Maintenance > Shutdown and Restart**.
- 2 Ensure you shutdown only one server. Uncheck box next to **Active Primary Server** and mark the check box next to **Active Backup Server**.
If you are repeating these steps for the second system within a cluster, mark the check box next to **Active Primary Server** and unmark the check box next to **Active Backup Server**.
- 3 Click **Shutdown**.
- 4 Unplug and unrack the server.

Configuring the New Server

You will configure the new server(s) by connecting it to the existing production server within the cluster. When you do this, the new server will be configured with the same network settings and information as the production server.

Connect the New Server to the Remaining Production Server

When you connect the new server to the remaining production server, it joins the cluster.

To restore the backup file to the new server:

- 1 Rack the replacement server and connect it to the network. Do not power it on.
- 2 Use a crossover cable to connect the new server to the existing production server
- 3 Power on the replacement server.
The replacement server boots, detects the presence of production server, gets its configuration from it, and joins the cluster. When done, both servers LCDs display **DMA Clustered**.
- 4 Wait for both servers to come online and show **DMA Clustered**.
- 5 Login to the system using the Virtual IP and confirm your settings and that both servers are online.
- 6 Enter the licensing information and verify that your new server is properly licensed.

Replacing the Second Server within the Cluster

Repeat the tasks within this section to replace the second server.

Replacing a RealPresence DMA Cluster within a Supercluster

You can replace a RealPresence DMA cluster that is configured to be part of a supercluster. Doing so requires additional steps to ensure that territories assigned to the cluster are still served while the cluster is being replaced.

When you replace a cluster that is within a RealPresence DMA supercluster, you need to perform the steps included in this section in the order that they are provided.

- [Busy Out the Cluster You Want to Replace](#)
- [Remove the Cluster from the Supercluster](#)
- [Follow the Instructions to Replace the Cluster](#)
- [Join the New Cluster to the Supercluster](#)

Busy Out the Cluster You Want to Replace

As a best practice, you need to busy out the RealPresence DMA cluster and wait for active calls to drop. This ensures that any active calls do not abruptly end. When the server is busied out, it stops accepting new calls.

To busy out the RealPresence DMA system:

- 1 Go to **Network > DMAs**.
- 2 In the **Actions** list, click **Busy Out**.
- 3 Verify that all calls have stopped by going to **Dashboard > Call Server Active Calls**.

Remove the Cluster from the Supercluster

Before replacing a cluster, you must remove it from the supercluster.

To remove a cluster from a supercluster:

- 1 Reassign all of the cluster's territory responsibilities to a different cluster.
- 2 Go to **Network > RealPresence DMAs**. In the list, select the cluster you want to remove.
- 3 In the Actions list, select **Remove from Supercluster**.
- 4 When asked to confirm that you want to remove the cluster, click **Yes**.

The selected cluster is removed from the supercluster. A dialog box informs you when the process is complete. If the cluster you removed is the one you're logged into, it logs you out and restarts.

- 5 Shutdown, unplug and unrack the server(s).

Follow the Instructions to Replace the Cluster

Depending on if the cluster is a single-server or two-server cluster, follow the instructions in the appropriate section.

- [Replacing a Standalone RealPresence DMA Server](#)
- [Replacing a Clustered RealPresence DMA Server](#)

Join the New Cluster to the Supercluster

You need to join your new cluster to the supercluster.

You need to fully replace the clustered system before joining it to an existing supercluster.

To join the new cluster to the supercluster:

- 1 Go to **Network > RealPresence DMAs**.
- 2 In the **Actions** list, click **Join Supercluster**.
- 3 In the **Join Supercluster** dialog box, enter the FQDN or host name of the virtual management interface of the cluster you wish to add.
- 4 Enter the user name and password with which to log into the RealPresence DMA cluster you specified.
- 5 Click **OK**.
A prompt warns you that the system will restart and local data will be overwritten, and asks you to confirm.
- 6 Click **Yes**.
The cluster you're logged into connects to the cluster you specified and establishes or joins the supercluster. It obtains supercluster-wide configuration and data (this may take a few minutes). A dialog box informs you when the process is complete and the cluster is ready to restart. Shortly after that, the cluster logs you out and restarts.
- 7 Click **OK** to log out immediately.
- 8 Log back in and verify that the **Supercluster Status** pane of the Dashboard shows the correct number of servers and clusters, and there are no warnings.
- 9 Go to **Network > RealPresence DMAs**, verify that the status of each RealPresence DMA cluster is **Superclustered**.
- 10 Reassign territory responsibilities as needed.

Replacing a RealPresence Resource Manager Server

When you replace a RealPresence Resource Manager server, you need to perform the steps included in this section in the order that they are provided.

- [Preparing the New Server](#)
- [Preparing the Production Server](#)
- [Configuring the New Server](#)

The instructions in this section assume you are using

Preparing the New Server

Before you discontinue use of your production server, you need to prepare the new server for use.

For the new server, you will need to do the following:

- Install the server and software
- Ensure the server is running the same software version as the production server

Install the Hardware and Software

Follow the instructions in the System Installation chapter for the *RealPresence Resource Manager System Getting Started Guide* for your version of software on [Polycom Support](#).

You do not need to do any initial configuration for the server. Use the default IP and ensure that you can log onto the server.

Upgrade to the Replacement Server to Same Software Version as the Current Server

Both the new server and the current server need to be running on the same version of RealPresence Resource Manager software. If they are not already doing so, you'll need to upgrade the new server to the same version as the production server.

Review the *RealPresence Resource Manager Upgrade Guide* for your version of software on [Polycom Support](#) for instructions on how to upgrade your system.

Preparing the Production Server

On the production server, you will need to do the following:

- Create a backup file that you can use to configure the new server.
- Shut down the system.

Create a Backup File from the Production Server

You need to create a backup file from your production server. You will upload this backup file to the new server to automatically configure it to match the production server settings.

To create a backup file of the production server:

- 1 From the RealPresence Resource Manager system web interface, go to **Admin > Maintenance > Backup/Restore System Settings**.
- 2 From the **Backup/Restore System Settings** page, click **Create and Download a Backup Archive**.
- 3 In the **Select location for download** dialog, enter a unique filename, browse to a location on your system and click **Save**.
A **File Download** dialog displays the progress of the download operation.
- 4 When the operation is completed, click **OK**.
- 5 Browse to the location you specified and verify the file download.

Shut Down the Production System

The new server will be configured to use the same IP as the production system. You need to shut down the production system before bringing the new server online.

To shut down the system:

- 1 Go to **Dashboard > Shutdown**.
- 2 Click **Shutdown**.

Configuring the New Server

You will configure the new server by uploading the backup file you created from the production server. When you do this, the new server will be configured with the same network settings and information as the production server.

Restore the Backup File to the New Server

You need to upload the backup file you created to the new server.

To restore the backup file to the new server:

- 1 Go to **Admin > Maintenance > Backup and Restore System Settings**.
- 2 In the **Select Archive File** section of the **Backup/Restore System Settings** page, navigate to the file archive file you want to upload and click **Open**.
- 3 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.

4 Click **OK**.

After a short delay, a dialog informs you that the system is going to be restored and you'll be logged out.

5 Log back into the system and verify that your configuration is as expected.

RealPresence Resource Manager 10.0 Customers

If you have upgraded to RealPresence Resource Manager 10.0 and are RealPresence Clariti customer, you will need to also migrate licensing as a part of the upgrade.

Please see the RealPresence Resource Manager System Upgrade Guide for your version of software on [Polycom Support](#).

Replacing a Redundant RealPresence Resource Manager System

When you replace a RealPresence Resource Manager system that has been configured with a two-server redundant configuration, you need to do the following:

To replace a two-server redundant RealPresence Resource Manager system:

- 1** Prepare two new servers. Follow the steps in [Preparing the New Server](#) twice.
- 2** Disable redundancy on the production system.
 - a** Log into the system using the virtual IP address for local redundancy or using the virtual FQDN for geographic redundancy.
 - b** Navigate to **Admin > Server Settings > Redundant Configuration**.
 - c** On the **Redundant Configuration** page, click **Reset Redundant Configuration**.
The two servers restart as single servers.
- 3** Create a backup file from one of the production servers. Follow the steps in [Create a Backup File from the Production Server](#).
- 4** Shut down both production systems.
- 5** Restore one of the new servers using the backup file you created. Follow the steps in [Restore the Backup File to the New Server](#).

- 6 Follow the directions in the *RealPresence Resource Manager System Operations Guide* to re-configure redundancy for the systems.

Replacing a RealPresence Access Director Server

When you replace a RealPresence Access Director server, you need to perform the steps included in this section in the order that they are provided.

If you have deployed a two-tunnel system, you need to repeat these steps on each server within the deployment.

- [Preparing the New Server](#)
- [Preparing the Production Server](#)
- [Configuring the New Server](#)

Preparing the New Server

Before you discontinue use of your production server, you need to prepare the new server for use.

For the new server, you will need to do the following:

- Install the server and software
- Ensure the server is running the same software version as the production server

Install the Hardware and Software

Follow the instructions in the System Installation chapter for the RealPresence Access Director System Getting Started Guide for the respective software version that you are installing.

You do not need to do any initial configuration for the server. Use the default IP and ensure that you can log onto the server.

Upgrade to the Replacement Server to Same Software Version as the Current Server

Both the new server and the current server need to be running on the same version of RealPresence Access Director software. If they are not already doing so, you'll need to upgrade the new server to the same version as the production server.

Review the RealPresence Resource Manager Upgrade Guide for instructions on how to upgrade your system.

Preparing the Production Server

On the production server, you will need to do the following:

- Create a backup file that you can use to configure the new server.
- Shut down the system.

Create a Backup File from the Production Server

You need to create a backup file from your production server. You will upload this backup file to the new server to automatically configure it to match the production server settings.

To create a backup file of the production server:

- 1 Go to **Maintenance > Backup and Restore**.
- 2 Under **Actions**, click **Create New**.
The system creates a new backup file and displays it in the list of backup files.
- 3 Select the backup file you created.
- 4 Under **Actions**, click **Download Selected**.
- 5 Select a location to store the file and click **Save**.
The progress of the file download displays.
- 6 Click **Close** when the download is complete.
- 7 Browse to the location you specified and verify the file download.

Shut Down the Production System

The new server will be configured to use the same IP as the production system. You need to shut down the production system before bringing the new server online.

To shut down the system:

- 1 Go to **Maintenance > Shutdown and Restart**.
- 2 Click **Shut Down**.
- 3 In the **Confirm Action** dialog, click **Yes**.
All active calls are terminated and users are logged out.

Configuring the New Server

You will configure the new server by uploading the backup file you created from the production server. When you do this, the new server will be configured with the same network settings and information as the production server.

Restore the Backup File to the New Server

You need to upload the backup file you created to the new server.

To restore the backup file to the new server:

- 1** Go to **Maintenance > Backup and Restore**.
- 2** Under **Actions**, click **Upload**.
- 3** Navigate to the backup file you created and click **Open**.
The progress of the file upload displays.
- 4** Click **Close** when the upload is complete.
- 5** Select the uploaded file from the list of backup files.
- 6** Under **Actions**, click **Restore Selected**.
- 7** In the **Confirm Action** dialog, click **Yes** to restore the system from the backup file you selected.
- 8** Verify that your system is configured and licensed as expected.