



PDMS-E to Poly Lens Migration Beta Program

Poly has announced the End of Sale for PDMS-E as of December 15, 2021 to take effect on February 15, 2022. The platform succeeding PDMS-E is Poly Lens, which will bring customers deploying Poly devices a more modern device management platform architecture and support for other Poly device families under one single pane of glass. Poly Lens is now ready to provide our customers a full suite of management features that PDMS-E has been providing to users.

In order to assist with customers migration to Lens, we have created a tool and a set of instructions to easily migrate to the new platform. Please refer to the below sections to learn more about this tool.

To allow our customers adequate time to migrate, we are providing them an extension to the duration of the active PDMS-E service at no cost. Current PDMS-E licenses will not expire until the end of the extension period, which is October 1, 2022. More details can be found below.

Beta Program

Along with the End of Commercial Sale announcement, we've begun our external customer beta that will be used to test the migration to Poly Lens. Poly Lens is now ready to provide our customers with value parity managing our Poly devices.

If you have any questions on the beta program, or to get enrolled in the beta program, please contact betasupport@poly.com. It is important to note that the PDMS-E **Export** feature is only enabled for enrolled beta customers.

Note: This process will migrate only devices that are supported by Poly Lens, with their minimum software version. See [Poly Lens Supported Devices](#).

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Before the Migration can Begin

The following items will need to be complete, before the migration can begin.

1. Customer is onboarded to Poly's beta site (poly.beta.com) – agreement signed, access to site, etc.
2. Customer's PDMS-E tenant is migrated to a new PDMS-E service group enabling the **Export to Poly Lens** feature.

Note: This step will require up to 4-hours of PDMS-E downtime and up to 24-hours for the customer's devices to re-register to PDMS-E.

Project management will coordinate with each customer to select the best time for this step.

3. When the above steps have been completed, the Customer can start the migration process to Poly Lens (see below).

PDMS-E Migration to Poly Lens

When migrating all your devices from PDMS-E to Poly Lens, there is a defined process to follow.

The following is the step-by-step migration process, with links to the detailed processes.

1. Create a new Account in Poly Lens, see [Create an Account](#).
This will allow you to have all the migrated devices in one account, until the full migration is complete.
2. Enable Provisioning on this new account, see [Enable Device Provisioning on an Account](#).
3. Prepare the PDMS-E environment to export to Poly Lens. For example, update software to a minimal level, if needed.
4. Export the PDMS-E configuration data, see [PDMS-E Export](#) section below.
Note: The PDMS-E **Export** feature is only enabled for enrolled beta customers.
- 5.
6. Import the file exported from PDMS-E into Poly Lens, see [Import the zipped PDMS-E file](#) section below.
7. Migrate devices from PDMS-E into Poly Lens, see [Migrate Devices options](#) below.

PDMS-E Export

The following procedure will export all configuration data from PDMS-E to several CSV files. The exported files will be packed in a zip archive and can be imported into Poly Lens.

Note: The PDMS-E **Export** feature is only enabled for enrolled beta customers.

To Export

1. Open the Poly Cloud Services Portal (<https://console.plcm.cloud/>).
2. Log in with your Poly Cloud Service account credentials.
3. Select the **PDMS-E** tile.
4. Select the **Export for Lens** button.

The screenshot shows the PDMS-E dashboard in the Poly Cloud Services Portal. The dashboard includes a sidebar with navigation options and a main content area with several charts and buttons.

Dashboard Summary:

- Buttons: Refresh, Export for Poly Lens
- Device Summary: Online: 0, Total: 19
- Device Type:

RealPresence Trio	7
Polycom Studio	7
VVX	4
Polycom Phone	1
- Site:

Intranet	8
T4-lab	5
7.83Hz	5
BetoHome	1
Singapore	0
MWFST Site	0
- Device Group:

BetoHomeLab	3
T4-lab-TRIOs	2
T4-lab-VVX	2
VVX501	1
CloudRelay	1
Rich-desk-Trio-8500	1
- Device Model:

Polycom Studio	7
RealPresence Trio B...	4
Trio C60	2
VVX 501	2
VVX 501	1
Unknown	1

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5. The configuration data is downloaded in a Zip file on your system.
6. This file can now be imported into Poly Lens. See [Import PDMS-E Configuration File into Poly Lens](#).

Import PDMS-E Configuration File into Poly Lens

The **Import & Migrate** feature allows you to migrate existing accounts, devices, device groups and sites into Poly Lens.

Import the Zipped CSV Files

1. When the zipped CSV files are complete, go to **Account menu > Import & Migrate**.
2. There are two methods of attaching a file:
 - Click the dialog box and locate the file to import.
 - Drag-and-drop a file onto the blue square on the dialog box.
3. Select **Import** to begin the process.
4. Select **Done**.

Note: If there is an error when importing the file, an error log will display, directing you to the fields that caused the errors.

Migrate Devices from PDMS-E to Poly Lens

Devices currently pointing to PDMS-E for management and provisioning has a set of parameters configured for it. In this process, the devices will now need to point to Poly Lens instead of PDMS-E.

To migrate the Devices from PDMS-E to Poly Lens, there are the following options:

- [Create a Configuration Profile to Redirect Devices to your Poly Lens Accounts](#)
- [Onboard Devices via the Provisioning via DHCP Auto Discovery](#)
- [Onboard a Poly Studio USB video Device using Provisioning](#)
- [Onboard a Poly EagleEye Cube Device using Provisioning](#)
- [Onboard a Single Voice Device using Provisioning](#)

Create a Configuration Profile to Redirect Devices to your Poly Lens Accounts

After the Poly Lens environment is setup, return to PDMS-E where your Devices are located.

The screenshot shows the 'Add Configuration Profile' page in the Polycom Device Management Service. The page is divided into several sections:

- General Information:**
 - *Profile Mode: Polycom Phone Provisioning
 - *Profile Name: redirect_to_Lens_Provisioning
 - *Profile Type: UserDefined
 - Description: (empty text area)
- Configuration Attributes:**
 - Software: Polycom Phone (dropdown), (none) (dropdown)
- Custom Fields:**
 - Buttons: Standard Fields, Custom Fields, Import from File, Paste Configuration XML
 - Text input: Enter a custom field name and click 'Add'.
- Table of Custom Fields:**

prov.server.mode	Manual	Text	Resource File	Remove
prov.server.type	HTTPS	Text	Resource File	Remove
prov.url	https://[redacted]deviceprovisioning.dtm.lens	Text	Resource File	Remove
prov.username	PlomSpj	Text	Resource File	Remove
prov.password	[redacted]	Text	Resource File	Remove

1. Create a new Profile with a distinctive name that will be used to redirect your Devices.
2. Add the following **Custom Field parameters**.
 - o prov.server.mode – Manual
 - o prov.server.type - HTTPS

Add the following parameters from the Poly Lens Device Provisioning page (Go to **Account menu > Manage Accounts**).

- o prov.url - the **Provisioning Server Address**
 - o prov.username - the **Server User**
 - o prov.password - the **Server Password**
3. Click **Save**.
 4. Apply to either the device or group of devices that you are migrating.

Onboard Devices via the Provisioning via DHCP Auto Discovery

You can onboard (register) several devices in a group into Poly Lens.

Note: This procedure applies to Poly Trios, Poly CCX Series, and Poly VVX Series devices, See [Poly Lens Supported Devices](#) for a list of supported device models.

1. You must be logged into Poly Lens and have created an account.
2. **Device Provisioning** must be enabled on the account. See [Device Provisioning on an Account](#).
3. On the **Device Provisioning** page, select the copy icon, located after the Provisioning Server Address, this will copy the address to the clipboard.
4. Provide this information to the Poly Lens account DHCP owner.
 - a. DHCP Option Format: [https://<ServerUser>:<Password>@<ProvisioningServerAddressURL>](#).
 - b. Your network environment will vary based on your deployment, however, Options 66, 160, or 161 may commonly be used based on your device type.

Initial Parameters that are being Set by the Provisioning Service

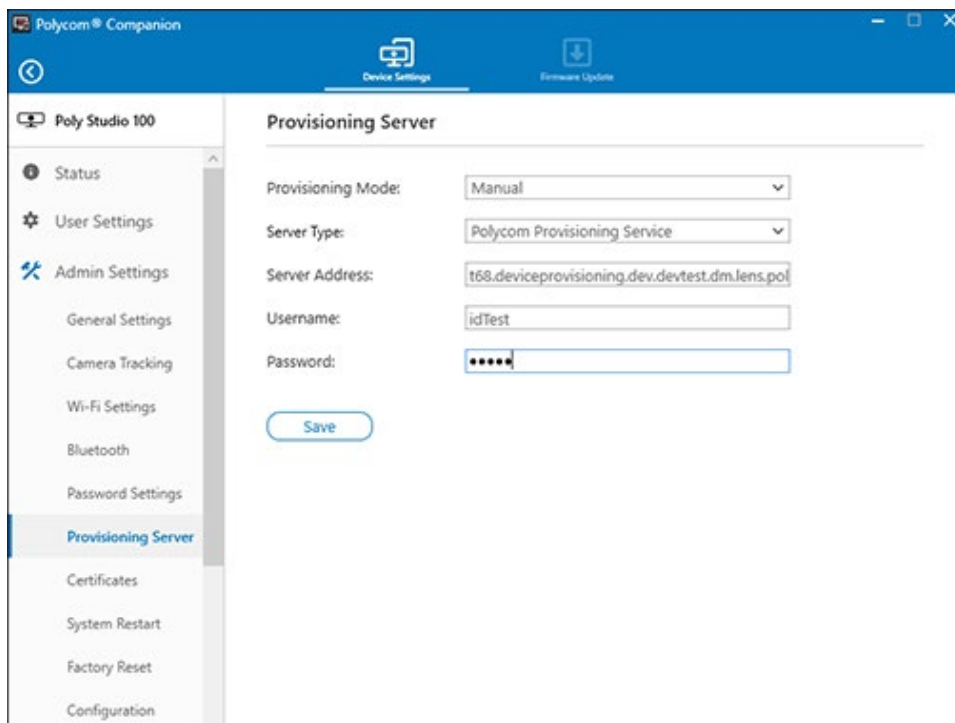
The following parameters are set by the provisioning service.

Friendly Name	Settings Name	Value
Enable Automatic Provisional Polling	prov.polling.enabled	1
Provisional Polling Mode	prov.polling.mode	random
Relative Period Between Polling Requests	prov.polling.period	86400
Polling Start Time	prov.polling.time	03:00
Polling End Time	prov.polling.timeRandomEnd	05:00
Enable REST API Interface	apps.restapi.enabled	1
Enable HTTP Server	httpd.enabled	1
Enable Web Admin Portal	httpd.cfg.enabled	1
Screen Capture	up.screenCapture.enabled	1
Enable Poly Lens	feature.lens.enabled	1
Enable Legacy Polycom Cloud	feature.pcc.enabled	0
Enable ObiTalk Cloud	feature.obitalk.enabled="0"	0
Enable Lens Reporting (for VVX)	feature.da.enabled="1"	1
Lens Cloud Environment	pcc.url	One00092668

Onboard a Poly Studio USB video Device Using Provisioning

To onboard (register) a Poly Studio USB device into Poly Lens, you will use the Polycom Companion application.

1. You must be logged into Poly Lens and have created an account.
2. **Device Provisioning** must be enabled on the account. See [Device Provisioning on an Account](#).
3. On the **Device Provisioning** page, select the copy icon, located after the Provisioning Server Address, this will copy the address to the clipboard.
4. Open the **Polycom Companion** application while the Poly Studio USB device is connected to your PC.
5. Select **Admin Settings**.
6. Log into the application.
7. Select **Wi-Fi Settings**.
8. Set up the Provisioning Server.
Select **Admin Settings > Provisioning Server**.
9. Set the Provisioning Mode to **Manual**.
10. Set the Server Type to **Polycom Provisioning Service**.
11. Paste the copied Provisioning Server Address from Poly Lens into the **Server Address** field.
Note: Remove the [https://](#) from the address.
12. Enter the **Server User** in the **Username** field, and **Password** that you entered in step 3 above.
13. Click **Save**.

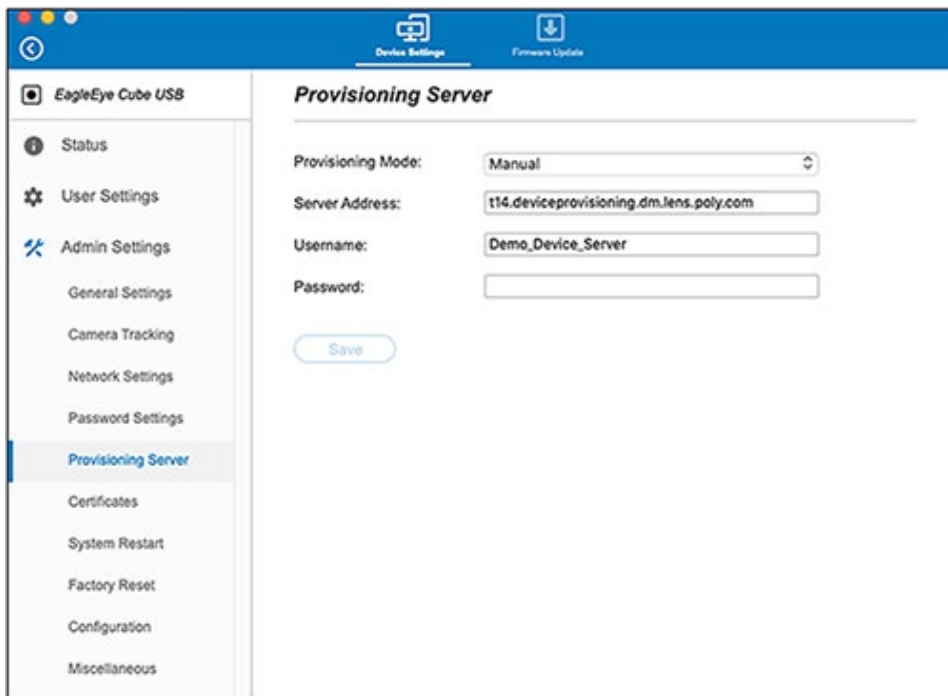


14. Verify the device is in Poly Lens.

Onboard a Poly EagleEye Cube Device Using Provisioning

To onboard (register) a Poly EagleEye Cube device into Poly Lens, you will use the Polycom Companion application.

1. You must be logged into Poly Lens and have created an account.
2. **Device Provisioning** must be enabled on the account. See [Device Provisioning on an Account](#).
3. On the **Device Provisioning** page, select the copy icon, located after the Provisioning Server Address, this will copy the address to the clipboard.
4. Open the **Polycom Companion** application while the Poly EagleEye Cube device is connected to your PC.
5. Select **Admin Settings**.
6. Log into the application.
7. Select **Network Settings**.
8. In the **Network Mode** field, select **Ethernet** from the drop-down list.
Once connected the **Status** field should display **Connected**, and the IP address of the device.
9. Set up the Provisioning Server.
Select **Admin Settings > Provisioning Server**.
10. Set the Provisioning Mode to **Manual**.
11. Paste the copied Provisioning Server Address from Poly Lens into the **Server Address** field.
Note: Remove the <https://> from the address.
12. Enter the **Server User** in the **Username** field, and **Password** that you entered in step 3 above.
13. Click **Save**.

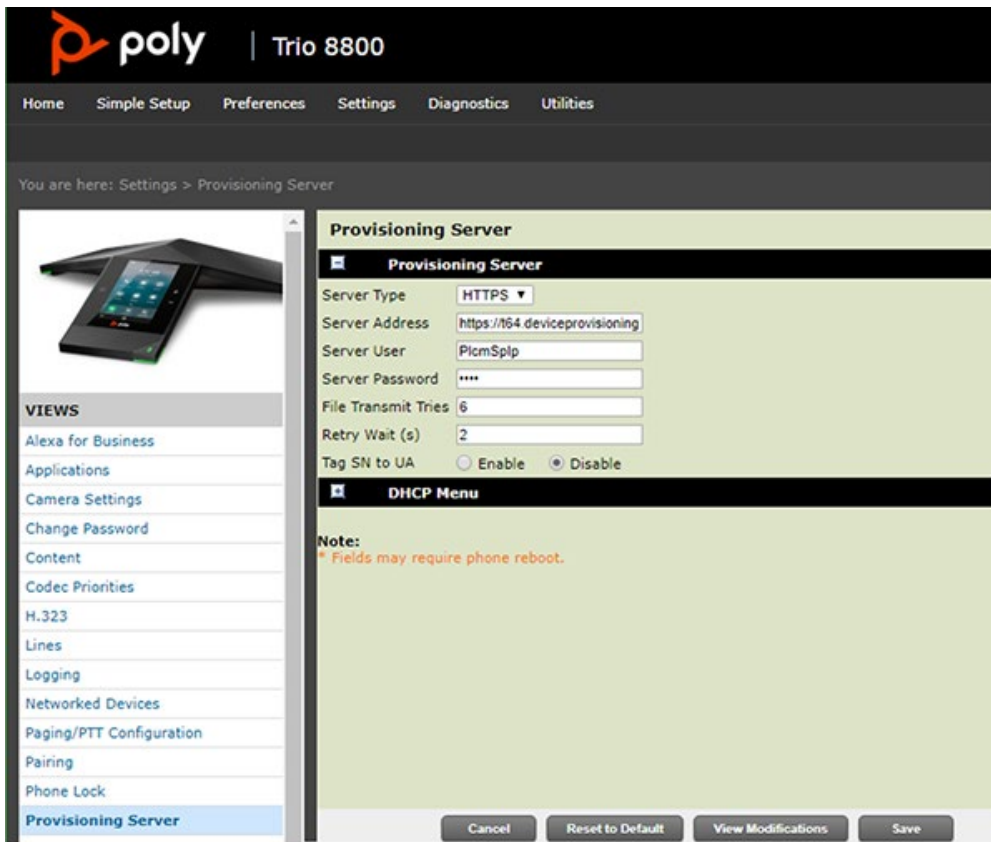


14. Verify the device is in Poly Lens.

Onboard a Single UC Device Using Provisioning

To onboard (register) a single device into Poly Lens, the device Web Configuration Utility is used.

1. You must be logged into Poly Lens and have created an account.
2. **Device Provisioning** must be enabled on the account. See [Device Provisioning on an Account](#).
3. On the **Device Provisioning** page, select the copy icon, located after the Provisioning Server Address, this will copy the server address to the clipboard.
4. Open the device Web Configuration Utility.
5. Select **Settings > Provisioning Server**.
6. Paste the copied Provisioning Server Address into the **Server Address** field.
7. Set the Server Type to **HTTPS**.
8. Enter the **Server User** name and **Password** that you entered in step 3 above.



The screenshot shows the Poly Trio 8800 Web Configuration Utility interface. The top navigation bar includes Home, Simple Setup, Preferences, Settings, Diagnostics, and Utilities. The breadcrumb trail indicates the current location: Settings > Provisioning Server. A sidebar on the left lists various settings categories, with 'Provisioning Server' selected. The main content area is titled 'Provisioning Server' and contains a form with the following fields:

- Server Type: HTTPS (dropdown menu)
- Server Address: https://164.deviceprovisioning
- Server User: P1cmSplp
- Server Password: ****
- File Transmit Tries: 6
- Retry Wait (s): 2
- Tag SN to UA: Enable Disable

Below the form is a 'DHCP Menu' section with a note: '* Fields may require phone reboot.' At the bottom of the page are four buttons: Cancel, Reset to Default, View Modifications, and Save.

9. Click **Save**.
10. Click **Yes** to save the configuration file.
11. The device will reboot, click **OK** to refresh the Web Configuration Utility screen.
12. Verify the device is in Poly Lens.

FAQ for PDMS-E to Poly Lens Import

Q1: What data can be imported into Poly Lens from PDMS-E?

A: The following are imported today:

- Device level policies
- Site level policies
- Group level policies (equivalent to group PDMS-E policies and as the top priority group in Poly Lens model level policy from PDMS-E)
- Model level policies (equivalent to PDMS-E global policies)
- Group membership
- Site membership

Coming shortly:

- Site subnet configuration

Not imported, nor planned to be:

- User accounts
- Devices are not redirected automatically allowing for inspection of imported data before they are pointed to Poly Lens

Q2: Import went well but I see errors of the below type, is everything ok?

Device Identifier: 0004f2fc3260

Errors:

The log.sched.1.level setting is not a valid setting for this model.

The log.sched.1.period setting is not a valid setting for this model.

The mr.pair.uid.1 setting is not a valid setting for this model.

The reg.1.address setting is not a valid setting for this model.

The reg.2.address setting is not a valid setting for this model.

The reg.2.displayname setting is not a valid setting for this model.

A: YES, import worked fine. The above are common when importing PDMS-E policies as PDMS-E relies on device ignoring parameters not applicable to its model. Poly Lens does strict schema validation hence the errors. We will update the error log shortly to indicate the fact that these are not actual errors.

Q3: Some devices have not been imported as reported by import below, why?

Device Identifier: 8g19134d5342f9

Errors:

Device not imported because it belongs to a different account

A: This is expected as the device already belongs to a different account. While this will be practically nonexistent in production we see these in testing mostly due to reuse of devices across accounts.

Q4: The import didn't work for some settings and reported errors of the below type:

The {{setting_name}} setting has not been given a value of the correct data type.

A: This means the value assigned to the setting is either of the wrong type (integer vs Boolean for example) or outside the range permitted. This indicates incorrect configuration and as such this specific setting won't be used in the policy. It again is not an import error but rather original configuration mistake.

Q5: All data seems to have been imported correctly but I get a message indicating I can download error log file but when downloaded it's empty.

Congratulations, everything worked perfectly!

A: Empty error log indicates there were no errors. This will however be fixed in the Poly Lens UI not to point to an error log shortly.