

Technical Bulletin CS-16-11

Migrating from CMS 1.5 to CMS 2.0

This technical bulletin explains the process for migrating your existing CMS 1.5 environment and PIVOT handsets to CMS 2.0 or later.

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System Affected

All PIVOT (Spectralink 87-Series) handset models
CMS (Spectralink CMS Configuration Platform)

Description

This document describes the migration steps to get new and existing customers onto CMS 2.0. If during the process you have questions, please contact Spectralink Technical Support.

Key Migration Considerations

- SW <= v1.7 only communicates with CMS 1.5 (not CMS 2.0)
- SW v1.8 communicates with CMS 2.0 (and CMS 1.5)
- SW v2.0 has limited CMS 2.0 heartbeat communication, undesirable long-term deployment situation
- SW v2.1 should not communicate with CMS 1.5, possible settings corruption. Exception being 8744.
- CMS 2.0 can perform as a software upgrade server prior to a device being accepted.

Scenarios

The following lists some of the more likely scenarios:

Existing Customer

1. Deployed 8741/42/53 with <= SW v1.7 with CMS 1.5
2. Deployed 8744 with = SW v2.0 with CMS 1.5

3. Deployed 8741/42/53 with <= SW v1.7 without CMS 1.5
4. Deployed 8744 with = SW v2.0 without CMS 1.5

New Customer

5. Out-of-Box 8741/42/53 with <= SW v1.7 with CMS 2.0
6. Out-of-Box 8744 with = SW v2.0 with CMS 2.0
7. Out-of-Box 8741/42/53 with >= SW v1.8 with CMS 2.0
8. Out-of-Box 8744 with >= SW v2.1 with CMS 2.0

Scenario: #1 Existing (CMS - Phones running <= v1.8)

Stand-up CMS 2.0

1. Install CMS OVF (open existing VM)
2. Switch to prompt (Alt-F2). Login username: cms2, password: cms2
3. cd bin
4. sudo python network_init.py
5. sudo python application_init.py
6. Browse to CMS 2.0
 - a. When prompted create admin user
 - b. Login as admin user
 - c. Install CMS license (get from original records or CMS 1.5 export (CMSExport->uploads->license->license.txt & serial.txt)
 - d. Get CMS 2.0 Account key and store in file
 - e. Get CMS 2.0 HTTPS Certificate (optional) and store in file.
 - i. In CMS 2.0, go to "About us" section. Click "copy to clipboard". Open text editor such as notepad and paste the certificate. Save with a .crt extension.
7. Setup any Enterprise and Group level configuration params not set via CSV migration.

CMS 1.5 Migration Preparation

8. Upload PIVOT Software v1.8
 - a. PIVOT:SC can stay on v2.0
9. Update PIVOT devices to SW v1.8
10. Remove PIVOT SW from CMS

- a. Login to console on host with Username: provision, Password: provision
 - b. Remove update files "sudo rm /webapps/spectralink_cms/uploads/otaupdate/*"
11. Export Config (Server Settings -> Import / Export CMS Data)
12. Switch to CMS 2.0:
- a. Upload CMSExport.zip into CMS 2.0 (Batch Configuration->Generate CSV") then "Browse Files"
 - i. Then open sip.csv which is the downloaded output to check for bad data (mac addr)
 - ii. Review CSV for invalid data e.g. MAC addresses
 - b. Upload sip.csv into CMS 2.0 under (Batch Configuration-> Upload Files to Server).
 - i. Verify the sip upload is successful (it appears on the screen).
13. Switch to CMS 1.5:
- a. Create the AccountKey field in CMS:
 - b. Log into CMS 1.5 using Chrome Username: spectralink Password: 3edc4rfv
 - c. Under Enterprise Settings, click "Setting uris"
 - d. Click the blue button, "+ Add setting uri"
 - e. Under the setting header, click on the "+" to the right of the Setting drop down, a new window should open, then use it to set following fields:
Name: config_mgnt_acct_key
Value type: String
Category: Config Manager
Content uri: content:..settings.spectralink.config_mgnt_acct_key
Label: Config Management Account Key
 - f. Set Visible to checked
 - g. Set Product Family to "PIVOT (87xx series)"
 - h. Click Save. The window should close, so go back to the original "Add setting URI" window, set:
Firmware Version: UNKNOWN
Uri: content:..settings.spectralink.config_mgnt_acct_key
 - i. Click Save.
 - j. Logout as Spectralink, and log back into CMS 1.5 using your admin account.
 - k. Create a temporary Swing group in CMS 1.5 (e.g. CMS2Swing)
 - i. Under devices -> Device Groups -> Add device group

- I. Then install the CMS 2.0 self-signed cert into CMS 1.5
 - i. Goto Certificates, then click Add certificate
 1. name it "CMS2Cert".
 2. select "other" for Certificate type
 3. Choose the file you created, i.e. "cms2.crt"
 4. Select "Save / Send Config"
 - ii. The certificate should appear in the certificate list.
 - m. Then use Configure devices -> Enterprise level -> Select cert from non-wifi certificate field in the Device Security section, then click save
 - i. Wait, and you should see user certificate in phones. Admin Settings -> Security ->Trusted Credentials -> User
 - ii. Also you will see you network is being monitored alert in notification bar.
14. Next delete the CMS device level settings. This should not delete device level settings in the phones themselves.
- a. Login to CMS 1.5 at the CLI (using alt-F2) as Username: provision, Password: provision
 - b. From User directory, either create the file and FTP it onto CMS 1.5, or create the following clear_devices.sh script (using nano or vi):

```
#!/bin/sh
sudo -u postgres psql -d cms_application << EOF
delete
  from sl_configs_setting_value
  where setting_id = 'CONFIG_MGNT_SERVER_URL' and device_id is not null;
EOF
```
 - c. On the command line, type `chmod +x clear_devices.sh`
 - d. Then on the CLI, type `./clear_devices.sh`
 - i. The script should run and you should see "DELETE X" where X is the number of devices.
 - ii. The purpose of this script is to remove any device level settings of the Config Management URL, otherwise the Swing Group setting of the URL will not take effect. If possible, double check that devices setting has been cleared.
 - iii. Please note that if you receive an error that the "cms_application" database could not be found then it is likely you did not perform device configuration on your CMS 1.5 server. You can safely move to step 15.
15. Setup Swing Group in CMS 1.5

- a. Copy in CMS 2.0 account key into Swing Group.
 - i. Under CMS 1.5 under Configure Group, then select group (e.g. CMS2SwingGroup)
 - ii. Then enter account key
 - b. Setup CMS 2.0 IP address/hostname (e.g. "https://192.168.1.15")
 - i. Enter URL, it must have HTTP:// or HTTPS://
 - ii. No trailing forward slash after URL
16. Move phones over to Swing Group
- a. Move over a small number of phones into Swing Group.
 - i. Under Device Group select your Swing Group
 - b. Then for each device you want, under "Device to Device Group" & "To Group" select the MAC addresses of the devices you want to move.
 - c. Once they swing over to CMS 2.0, it is suggest you remove them from CMS 1.5 to reduce the device list clutter.
 - i. Under device list you will set devices that have been moved to that swung group listed, so just delete those from the list.
17. CMS2, Approve Devices in Device Holding Area
18. ALL DONE!!!
- [Optional: Then use CMS 2.0 to upgrade phones to v2.1.]

Scenario #2: (Deployed 8744 with = SW 2.0 with CMS 1.5)

1. Follow Scenario #1.
2. Recommend upgrading 8744s to SW 2.1 with CMS 2.0.

Scenario #3: Deployed 8741/42/53 with <= SW 1.7 without CMS 1.5 (Voalte scenario)

1. TBD (manual installation of account key etc is not considered an option)

Scenario #4: Deployed 8744 with <= SW 2.0 without CMS 1.5

1. TBD (manual installation of account key etc is not considered an option)

Scenario: #5 (Out of Box 8744 w/ SW <= v2.0)

1. Stand-up CMS 2.0 server

2. Use QNC to install account key, CMS server address
3. Reset PIVOT
4. PIVOT should download new firmware
5. Reset PIVOT
6. PIVOT should appear in holding area
7. Update PIVOT firmware to v2.1 using CMS 2.0

Scenario: #6 (Out of Box PIVOT w/ SW <= v1.7)

1. Stand-up CMS 2.0 server
2. Use QNC to install account key, CMS server address & update server address to get SW v1.8
3. Reset PIVOT
4. PIVOT should download new firmware
5. Reset PIVOT
6. PIVOT should appear in holding area
7. Optional: Update PIVOT firmware to v2.1 using CMS 2.0

Scenario: #7 & #8 (Out of Box PIVOT w/ SW >=1.8)

1. Stand-up CMS 2.0 server
2. Use QNC to install account key, CMS server address
3. Reset PIVOT
4. PIVOT should appear in holding area
5. Optional: Update PIVOT firmware to v2.1 using CMS 2.0

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