



ADMINISTRATOR GUIDE

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# Polycom<sup>®</sup> Device Management Service for Service Providers



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6001 America Center Drive  
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# Before You Begin

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## Topics:

- [Audience, Purpose, and Required Skills](#)
- [Getting Help](#)

This guide describes how to monitor, and manage Polycom VVX devices running UC Software and OBi Edition using the Polycom Device Management Service for Service Providers (PDMS-SP). For more information, refer to [PDMS-SP Device Management Platform FAQ](#).

## Audience, Purpose, and Required Skills

This guide is written for a technical audience, specifically admins who manage the company's endpoints.

You must be familiar with the following concepts before beginning:

- Current telecommunications practices, protocols, and principles
- Telecommunication basics, video teleconferencing, and voice or data equipment
- Virtual machine environments
- Networking, security certificates, and software configuration

## Getting Help

For more information about installing, configuring, and administering Polycom products, refer to **Documents & Software** 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.

## Documentation Feedback

We welcome your feedback to improve the quality of Polycom documentation.

You can email [Documentation Feedback](#) for any important queries or suggestions related to this documentation.

# Getting Started

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## Topics:

- [Polycom Device Management Service Overview](#)
- [Polycom Device Management Service for Service Providers Overview](#)
- [Navigating the Service](#)

The Polycom Device Management Service for Service Providers (PDMS-SP) portal enables you to offer your customer organizations a secure, cloud-based management software as a service (SaaS). The PDMS-SP cloud is an external out-of-band tether to the connection between you (the service providers) and Polycom devices. With PDMS-SP, you can remotely track, provision, report, and troubleshoot your customers' supported Polycom VVX endpoints.

## Polycom Device Management Service Overview

Polycom Cloud Services amplify your device experience on the platform of your choice with backend management tools and innovations that create an excellent end user & IT support experience. By leveraging cloud technology, we can deliver the specific solutions to address your unique needs as an enterprise or a service provider.

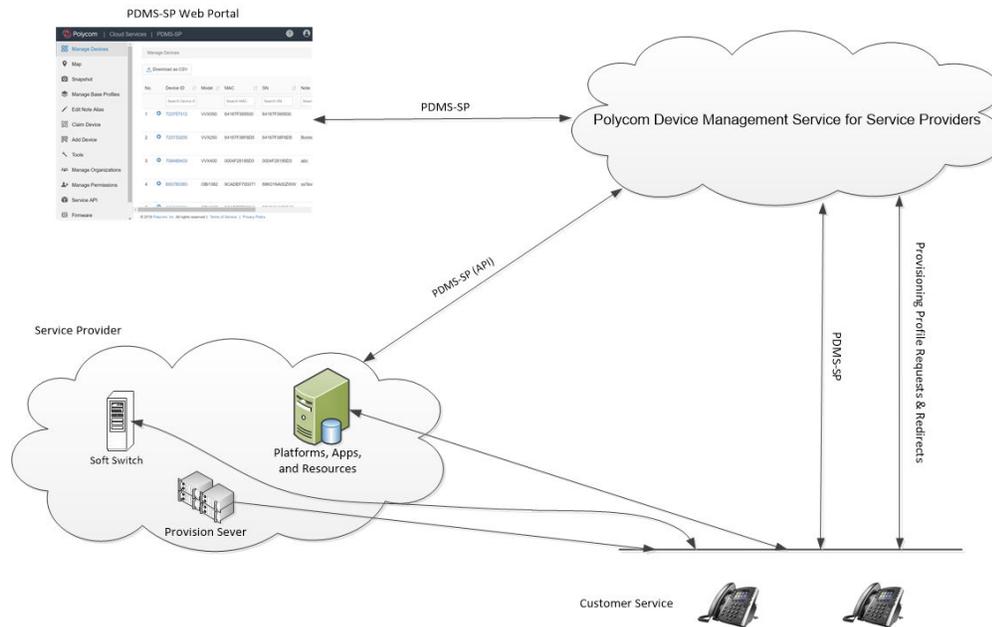
Polycom Device Management Service for Service Providers is an innovative cloud management service that speeds initial deployments, delivers advanced troubleshooting, reduces on-going operating expenses, and helps service providers deliver better life-cycle support to accelerate their business. PDMS-SP is designed for maximum scalability supporting millions of devices and flexible enough to support multiple tenants across the globe.

Polycom Device Management Service for Enterprises is a dedicated cloud portal that simplifies the staging, management, and monitoring of your Polycom voice devices. With PDMS-E, organizations of any size can apply any one of hundreds of provisioning profiles to enable faster adoption through a custom and consistent user experience. Additionally, enterprise IT administrators can leverage the web portal from anywhere to manage, view, and troubleshoot up to 50,000 devices. For more information about Polycom Device Management Service for Enterprises, refer to [Polycom Device Management Service Administration Guide](#).

## Polycom Device Management Service for Service Providers Overview

PDMS-SP is a highly scalable, multi-tenanted cloud device management service designed specifically for service providers capable of supporting millions of devices. You can configure, modify, troubleshoot and maintain Polycom VVX devices from within the portal.

When admins of a subscribing organization log in to the PDMS-SP portal, they can access their supported endpoints using a web browser, enabling fast and easy device configuration and maintenance.



## Supported Endpoints

The PDMS-SP supports the following devices:

- Polycom UC Software 5.8.0 or higher
  - Polycom VVX 101 business media phones
  - Polycom VVX 201 business media phones
  - Polycom VVX 300/301/310/311 business media phones
  - Polycom VVX 400/401/410/411 business media phones
  - Polycom VVX 500/501 business media phones
  - Polycom VVX 600/601 business media phones
  - Polycom VVX 150 business IP phones
  - Polycom VVX 350 business IP phones
  - Polycom VVX 250 business IP phones
  - Polycom VVX 450 business IP phones
- Polycom OBi Edition Software 6.3.0 or higher
  - Polycom VVX 150 business IP phones, OBi Edition
  - Polycom VVX 350 business IP phones, OBi Edition
  - Polycom VVX 250 business IP phones, OBi Edition
  - Polycom VVX 450 business IP phones, OBi Edition
- Polycom OBi devices

## Navigating the Service

Access PDMS-SP features using the PDMS-SP web portal. The web portal enables you to manage devices, users, and organizations and access firmware, documentation, and tools.

### Accessing PDMS-SP Services from PDMS-SP Portal

If you are not a Polycom Cloud Services user, you can access PDMS-SP services from PDMS-SP portal.

#### Create a New PDMS-SP User Account

You can create a new PDMS-SP user account.

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**Note:** To be eligible to use PDMS-SP, you need to be a registered Polycom partner. Go to <http://www.polycom.com/partners/become-partner.html/partnerapp> to apply a partner program.

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#### Procedure

1. Go to <https://www1.obitalk.com> and click **Create a new account**.
2. Fill out the form with your registration information and click **Continue**.
3. Select your country and enter the captcha.
4. Agree the [Terms & Conditions](#) and [Privacy Policy](#) and click **Register**.  
PDMS-SP creates a consumer account for you. When system creates an account to you, you receive an invitation email with instructions to confirm your email address and change your password.
5. Send your email address to your Polycom Solution Architect, Sales Engineer, or PDMS-SP ITSP Domain Administrator so they can assign you to a ITSP user account.

### Adding Users to PDMS-SP

Domain administrators of existing PDMS-SP accounts can add existing users or invite new users to the PDMS-SP account. Refer to the [User Management](#) on page 32 to learn more about adding or inviting users.

#### Sign In to the Portal

You can sign in to the portal using your PDMS-SP account credentials.

#### Procedure

1. Go to <https://www1.obitalk.com>.
2. Enter your email address and password and click **Sign In**.

#### Sign Out

Sign out of the PDMS-SP portal.

**Procedure**

1. Click your user name in the upper-right corner of the PDMS-SP portal.
2. Click **Sign Out**.

**Change Account Password**

You can change your PDMS-SP account password.

**Procedure**

1. Click your user name in the upper-right corner.
2. Click **My Profile**.
3. Enter your **Old Password** and your **New Password**, then click **Change Password**.

**Edit Account Profile**

You can edit your PDMS-SP account profile.

**Procedure**

1. Click your user name in the upper-right corner of the screen.
2. Click **My Profile**.
3. Edit the following information:
  - **Display Name**
  - **About Me**
  - **Location**
  - **Forum Name**
4. Click **Save**.

**Edit Profile Icon**

You can update the profile picture for your PDMS-SP account.

**Procedure**

1. Click your user name in the upper-right corner.
2. Click **My Profile**.
3. In the **Edit Profile Icon** section, click **Choose File** to select a picture from your local system.
4. Click **Upload**.

**Required Ports and Trusted IP Addresses and Hosts****Required Ports**

This table lists the open ports on the PDMS-SP.

Protocol	Port	Direction
TCP	6800	out
TCP	5222	out
TCP	5223	out
UDP	5060	out
UDP	5061	out
UDP	10000 to 11000	out
UDP	16600 to 16998	out
UDP	19305	out
UDP	10000	in

### Trusted IP Addresses and Hosts

This table lists the PDMS-SP IP addresses and hosts you should trust. Refer to <https://www.obitalk.com/obinet/docs/obitalk-firewall-settings.txt> for the latest list.

#### PDMS-SP Trusted IP Addresses

Trusted IP Address	UDP/TCP	TLS
13.52.69.0	10000 to 20000	443
13.56.185.145	10000 to 20000	443
13.57.121.193	10000 to 20000	443
54.241.91.173	10000 to 20000	443
54.241.160.4	10000 to 20000 TCP: 6800	443
54.241.163.234	10000 to 20000	443
54.67.107.54	10000 to 20000	443
54.67.113.163	10000 to 20000	443
54.219.101.213	10000 to 20000	443
52.52.249.241	10000 to 20000	443
52.53.96.55	10000 to 20000	443
52.9.223.41	10000 to 20000	443
52.9.225.203	10000 to 20000	443

**PDMS-SP Provisioning Trusted Hosts**

Trusted Host	Description
www.obitalk.com	HTTP/HTTPS
www1.obitalk.com	HTTP/HTTPS
prov.obitalk.com	HTTP/HTTPS
devpfs.obitalk.com	HTTP/HTTPS
api.obitalk.com	HTTP/HTTPS
fw.obitalk.com	HTTP

# Adding Devices to PDMS-SP

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## Topics:

- [Onboard a Polycom VVX Phone Using a Configuration Profile](#)
- [Adding Polycom OBi Devices](#)

PDMS-SP provides multiple ways to add devices, ranging from bring-your-own-device (BYOD) services to mass-scale deployments.

## Onboard a Polycom VVX Phone Using a Configuration Profile

You can onboard a Polycom VVX phone with UC Software 5.8 or higher by setting the phone's configuration profile.

### Procedure

1. Obtain a PDMS-SP onboarding service tag.
  - a. Log in to the PDMS-SP portal.
  - b. Click **Service API**.
  - c. Copy the **Onboarding Service Tag** value.

Service Info	
Name	Value
Onboarding Service Tag	"PDMS-SP_Service_Provider"

2. Optional: Obtain a PDMS-SP onboarding service tag for a specific organization.

If you have created a hierarchy of multiple organizations under your top level Tenant, each organization has a unique Onboarding Service Tag that enables you to immediately link devices with that specific organization.

  - a. Click **Manage Organizations**.
  - b. Click the organization name.
  - c. Click **Service API**.
  - d. Copy the **Onboarding Service Tag** value for the organization.
3. Set the following values in your Polycom VVX phone configuration file on the provisioning server:

Parameter	Value
<b>device.set</b>	1

Parameter	Value
<b>device.da.enabled</b>	1
<b>device.da.enabled.set</b>	1
<b>feature.obitalk.enabled</b>	1
<b>diags.pcap.enabled</b>	1
<b>obitalk.accountCode</b>	<Your Onboarding Service Tag>

The following is an example of the Polycom VVX phone configuration file.

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<PHONE_CONFIG>
  <DEVICE_SETTINGS
    device.set="1"
    device.da.enabled.set="1"
    device.da.enabled="1"
  />
  <ALL
    obitalk.accountCode="PDMS-SP_Service_Provider-.1234567."
    feature.obitalk.enabled="1"
    diags.pcap.enabled="1"
  />
</PHONE_CONFIG>
```

4. Update your phone with the new configuration parameters.
5. After the phone reboots, refresh the PDMS-SP web page to view the Polycom VVX phone on your PDMS-SP dashboard.

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**Note:** It takes a couple of minutes for the device to register to your PDMS-SP account.

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#### Related Links

[Perform Remote PCAP for Polycom VVX Phones with UC Software](#) on page 27

## Adding Polycom OBi Devices

You can add Polycom VVX phones, OBi edition and other Polycom OBi devices by claiming them or adding them directly through the PDMS-SP portal.

### Claim a Polycom OBi Device

You can claim a Polycom VVX phone, OBi Edition and other Polycom OBi devices by using the device's MAC address, serial number (SN), and OBi number (OBi #).

You must have both the MAC address and serial number of the device. You may also need to have the OBi number of the device.

When you claim a device, the system assigns a ZT profile to it.

## Procedure

1. Click **Claim Device**.
2. Enter the device MAC address in the **MAC** field.
3. Enter the device SN in the **SN** field.
4. Select the desired ZT profile from the **ZT Profile** drop-down list.
5. Select an organization for the device from the **Organization** drop-down list.
6. Click **Claim**.
7. If the system prompts you to enter the OBi #, enter the device ID or OBi number in the **OBi #**.
8. Click **Claim**.
9. Click **OK** to confirm and claim the device.

## Claim Multiple Polycom OBi Devices

You can add multiple Polycom VVX phones, OBi Edition and other Polycom OBi devices using a .csv file.

You must have a .csv file that contains the MAC addresses, serial numbers, and OBi numbers of the devices you want to add. You can get the device list template from **Download Device List Template**.

## Procedure

1. Click **Claim Device**.
2. Click **Choose File** to select the device list file (.csv).
3. Select the desired ZT profile from the **ZT Profile** drop-down list.
4. Select an organization for the device from the **Organization** drop-down list.
5. Click **Claim**.

## Add a Polycom OBi Device

You can add Polycom VVX phones, OBi Edition and other Polycom OBi devices directly to the PDMS-SP portal through the **Add Device** tab.

You must have the devices physically with you or with your customer.

When you add a device using the PDMS-SP portal, the system assigns an N/A profile to the device, and the device doesn't receive a ZT profile customization.

## Procedure

1. Log in to the PDMS-SP portal.
2. Click **Add Device**.
3. Connect your device using one of the following options:
  - If you have an OBi Universal Phone Adapter:
    1. Connect the phone to the OBi device's phone port.
    2. Connect the OBi device's internet portal to your internet router or switch.

3. Power on the OBi device.
  - If you have an OBi phone:
    1. Connect the OBi phone **SW** Ethernet port to your internet router or switch.
    2. Power on the OBi phone.
4. Click **Next**.
5. Pick up the phone and dial the service activation code (as shown on the web browser).
6. Click **Manage Devices** to verify that the portal added the new device.

# Device Management

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## Topics:

- [Managing Devices](#)
- [Managing Configuration](#)
- [Edit the Note Alias Field](#)
- [View Online Devices](#)
- [View Device Snapshots](#)

Use PDMS-SP to manage all your endpoints remotely using a web browser to enable fast and easy device deployment and maintenance.

## Managing Devices

You can restart (warm reboot), reboot (cold reboot), and reset devices through the PDMS-SP portal.

### Check Device Status

You can check device status through the **Manage Devices** page.

#### Procedure

1. Click **Manage Devices**.
2. In the **Status** field, check the following device status information:

#### Polycom VVX Phones with UC Software

Status Color	Status	Description
Green	Connected	The device connects to PDMS-SP, and the device is online.
Red	Offline	The device is offline with zero touch.

#### Polycom VVX Phones, OBi Edition

Status Color	Status	Description
Green	Managed	The PDMS-SP manages and provisions the device, and the device is online.
Orange	Unmanaged	The device connects to PDMS-SP, and the device is online.

Status Color	Status	Description
Red	Offline	The device is offline with zero touch.
Black	Offline	The device is offline without zero touch.

## View and Configure Device Parameters and Profiles

You can view and configure device parameters and profiles through PDMS-SP.

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Configure the following device parameters and profiles:

#### Polycom VVX Phones with UC Software Parameters and Profiles

Parameter or Profile	Description
Device ID	Display the device ID.
MAC Address	Display the device MAC address.
Serial No.	Display the device serial number.
Firmware	Display the device firmware version.
Device Health	Display the device connection status.
Last Update	Display the last update time for the device.
Organization	Choose an organization for the device.
ITSP Status	Display the SIP service registration status.
Device Note	Specify a note to identify the device. You can search this field, and it's helpful when organizing your devices within PDMS-SP. Use this field to record the customer name, primary phone number, purchase order, or the customer account code.
Device Note 2	Specify a note to describe the device. You cannot search this field. Use this field to record specific device information, work history details, or other detailed descriptions.

**Polycom VVX Phones, Obi Edition Parameters and Profiles**

Parameter or Profile	Description
Device ID	Display the device ID.
MAC Address	Display the device MAC address.
Serial No.	Display the device serial number.
Firmware	Display the device firmware version.
Device Status	Display the device connection status.
Last Update	Display the last update time for the device.
Primary Line	Select primary line to use for a softphone gateway call.
Base Profile	Choose a base profile for the device.
Organization	Choose an organization for the device.
ITSP Status	Display the SIP service registration status.
Device Note	Specify a note to identify the device. You can search this field, and it's helpful when organizing your devices within PDMS-SP. Use this field to record the customer name, primary phone number, purchase order, or the customer account code.
Device Note 2	Specify a note to describe the device. You cannot search this field. Use this field to record specific device information, work history details, or other detailed descriptions.

## Reboot a Device

You can reboot a device from the PDMS-SP portal.

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Management** tab in the right panel.
4. Click **Reboot Device**.

## Reboot Multiple Devices

You can reboot multiple devices from the PDMS-SP portal.

You must use a .csv file to process the list of MAC addresses you want to reboot. You can get the .csv template from **Tools > Reset Devices > mac/obino list**.

### Procedure

1. Go to **Tools > Reboot Devices**.
2. Click **Choose File** to select the device list .csv file.
3. Click **Reboot**.

## Restart a Polycom VVX Phone with UC Software

You can restart a Polycom VVX phone running UC software through the PDMS-SP portal.

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Management** tab in the right panel.
4. Click **Restart Device** to restart the phone application.

## Factory Reset a Polycom VVX Phone with UC Software

You can factory reset a Polycom VVX phone with UC Software from the PDMS-SP portal.

Resetting the phone removes all configuration and stored settings, including the address of the provisioning server and the configured PDMS-SP account onboarding tag.

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**Warning:** After you factory reset the device, the device loses contact with PDMS-SP until you reconfigure and reconnect it to PDMS-SP. If your service doesn't include a Zero Touch deployment strategy such as Polycom Zero Touch Provisioning (ZTP) or DHCP option 66, the phone can't automatically return to service. The end user or a support technician may have to manually configure the device on-site to recover.

---

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Management** tab in the right panel.
4. Click **Reset Device** to factory reset the device.

## Factory Reset a Polycom OBi Device

You can factory reset a Polycom OBi device (Polycom OBi adapter or Polycom OBi IP phone) from the PDMS-SP portal.

Resetting the device removes all configuration and settings from the device. You can reset cloud configuration or local configuration for Polycom OBi devices.

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**Note:** When you factory reset the device, the device may or may not reinitiate connectivity with PDMS-SP and obtain its configuration depending on the ZT status.

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## Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Configuration** tab in the right panel.
4. Select one of the following reset options:

Reset Option	Description
<b>Reset Local Configuration</b>	Factory reset the device's local configuration.
<b>Reset Cloud Configuration</b>	Factory reset the device's cloud configuration.

## Related Links

[Cloud Configuration and Local Configuration](#) on page 38  
[Zero-Touch Profiles](#) on page 38

## Factory Reset Multiple Devices

You can factory reset multiple devices from the PDMS-SP portal.

You must use a .csv file to process the list of MAC addresses you want to factory reset. You can get the .csv template from **Tools > Reset Devices > mac/obino list**.

## Procedure

1. Go to **Tools > Reset Devices**.
2. Click **Choose File** to select the device list .csv file.
3. Select one of the following reset options:

Reset Option	Description
<b>Reset Local Configuration</b>	Factory reset only the local configuration of the devices in the device list file.
<b>Reset Configuration (Cloud &amp; Local)</b>	Factory reset both the local and cloud configuration of the devices in the devices list file.

4. Click **Reset**.

## Managing Configuration

You can view, download, and sync the device configuration from the PDMS-SP portal.

## Configuring Polycom VVX Phones with UC Software

You can push configurations to a Polycom VVX phone with UC software, view local configurations, and sync device configurations through the PDMS-SP portal.

## Push Device Configurations

You can push configurations to the device through the PDMS-SP portal.

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**Warning:** PDMS-SP adds the configuration changes to the phone's web configuration override layer, which has a higher precedence than the configuration pushed using your provisioning server. All configuration changes pushed using this method are cumulative.

---

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Configuration** tab in the right panel.
4. Enter the XML configuration content in **Web Config**. The format must follow the UCS provisioning XML format.
5. Click **Push Configuration/Web** to push the configuration to the device.

## View Local Device Information

You can view the device, network, and service information for Polycom VVX phones with UC Software through the PDMS-SP portal.

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Configuration** tab in the right panel.
4. Click **Local Configuration (Read Only)**.
5. Select the information that you want to view.

Information	Description
Primary Device Information	View device attributes.
Secondary Device Information	View the information for Polycom VVX accessories, such as expansion modules and cameras.
Network Information	View the network information, such as DNS domain, IPv4 address, and IPv4 address source.
Service Information	View the SIP registration status and proxy server information.

## View Local Device Configurations

You can view the local configurations for Polycom VVX phones with UC software from the PDMS-SP portal.

## Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Configuration** tab in the right panel.
4. Click **Local Configuration (Read Only)**.
5. Select the UC software configuration information you want to view.

UCS Configuration Type	Description
ALL (except Device Settings)	All configuration parameters that are modified from default values and are not device settings.
Local	Configuration parameters that are modified from the local phone menu.
Web	Configuration parameters that are modified from the <b>Web Configuration Utility</b> , the UC software REST API, and <b>Push Configuration</b> in PDMS-SP.
Config Files	Configuration parameters that are included in the provisioning configuration files.
TR-069	Configuration parameters that are modified through TR-069 provisioning.
SIP	Configuration parameters that are modified through in-band SIP provisioning.
Device Settings	Device parameters  Device parameters are settings that the phone stores in non-volatile flash memory and can access during its initialization stages.

## Sync Device Configurations

You can load the latest phone configuration changes on the provisioning server when you sync with a Polycom VVX phone with UC Software.

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Configuration** tab in the right panel.
4. Click **Sync Device Configuration**.

The device contacts the provisioning server for the configuration files and applies the configuration changes.

## Configuring Polycom VVX Phones, OBi Edition

You can view, edit, download, and reset the local configuration and cloud configuration for Polycom VVX phones, OBi Edition.

### View and Edit Device Configurations

You can view and edit the PDMS-SP cloud configuration and local configuration for Polycom VVX phones, OBi Edition.

#### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Configuration** tab in the right panel.
4. Select one of the following options:

Option	Description
<b>Local Configuration</b>	View or edit the device's local configuration.
<b>Cloud Configuration</b>	View or edit the device's PDMS-SP cloud configuration.

### Download Device Configurations

You can download the PDMS-SP cloud configuration and local configuration for Polycom VVX phones, OBi Edition to your PC.

#### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Configuration** tab in the right panel.
4. Select one of the following options:

Download Option	Description
<b>Download Local Configuration</b>	Download the device's local configuration.
<b>Download Cloud Profile</b>	Download the device's PDMS-SP cloud configuration.

### Configure ITSP Settings

You can configure ITSP settings for an OBi device using the **ITSP Config Wizard**.

#### Procedure

1. Click **Manage Devices**.

2. Click the **Device ID** of the device that you want to manage.
3. Click the **Configuration** tab in the right panel.
4. Click **ITSP Config Wizard**.
5. Select a SP to configure.
6. Configure the following ITSP parameters:

Parameters	Description
Configuration Name	Specify the configuration name.
Primary Line for Outgoing Calls	This option is selected by default so that calls made from this phone use the service without first dialing a service access code. If you clear this check box, users must dial **1 before the destination number to use this service.
Voicemail Notification	The corresponding selected phone has a stuttered dial tone when there is a new voicemail on the service.
7-Digit Dialing for USA&CAN (Optional)	Enables 7-digit dialing to call phones in the same area code.
Use This Service for Emergency 911 Calls	Select this check box to place and receive emergency service calls. Make sure the service can process emergency service calls before you select the check box.
Service Provider Proxy Server	Specify the service provider proxy server address.
Service Provider Proxy Server Port	Specify the service provider proxy server port.
Outbound Proxy Server	Specify the outbound proxy server address.
Outbound Proxy Server Port	Specify the outbound proxy server port.
Username	Show the account user name. The account is used in the OBi phone's authusername parameter.
Password	The phone's password. The phone stores the password and updates it if someone modifies password.
URI	Specify the URI when the service provider requires you to use a SIP AuthID.

7. Click **Save**.

## Generate a Configuration File Using the Configuration Template Generator

You can use the configuration template generator to generate a configuration file to post to your device.

You can use this template as a baseline configuration that works with a provisioning server solution for mass deployment of Polycom OBi devices.

## Procedure

1. Go to **Tools > Configuration Template Generator**.
2. Click the **Click Here** link to launch the configuration template generator.
3. Select the device model under **Models**.
4. Optional: Apply tags using one of the following options:
  - **Options > Apply BSFT/BW Tags**
  - **Options > Apply Netsapiens Tags**
5. Search for the object or parameter that you want to configure and enter the value that you want to select in the **Object name**, **Parameter name**, or **Parameter value** fields.  
The relevant parameters display, and you can view or make changes to the value.
6. Optional: Select the **Df** check box to insert the default value of the parameter.
7. Optional: Clear the **In** check box to exclude the parameter but keep it on the record.
8. Change the other parameters by following steps 5 - 7.
9. Export the configuration file using one of the following options:
  - **Options > Export (Short Format)**
  - **Options > Export (Long Format)**
10. Post the exported configuration file to your device. Or, if you chose **Apply BSFT/BW Tags** or **Apply Netsapiens Tags** in step 4 on page 23, upload or enter the XML content of the exported configuration to the call control platform's provisioning server solution.

## Duplicate Device Configurations

You can duplicate one Polycom VVX phone, OBi Edition configuration and post the configuration to another device.

## Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Select one of the following options:

<b>Download Option</b>	<b>Description</b>
<b>Download Local Configuration</b>	Download the device's local configuration.
<b>Download Cloud Profile</b>	Download the device's PDMS-SP cloud configuration.

4. Go to **Tools > Configuration Template Generator**.
5. Click **Click Here** to launch the configuration template generator.
6. Click **Models** and select the device model from the drop-down menu where you want to post the configurations.
7. Go to **Options > Import** and select the configuration file you downloaded in step 3.

8. Once the system loads the parameters, go to **Options > Exclude All With Default Checked**.
9. Export the configuration file using one of the following options:
  - **Options > Export (Short Format)**
  - **Options > Export (Long Format)**
10. Post the exported configuration file to your device.

## Edit the Note Alias Field

You can edit the **Note Alias** field to automatically populate the **Note** column in the **Manage Devices** page.

---

**Note:** You can only use this function on Polycom VVX phones, OBi Edition and Polycom OBi devices, and only when you configure the OBi devices with that specific parameter using the cloud configuration.

---

### Procedure

1. Click **Edit Note Alias**.
2. Input a full parameter name to assign information within the cloud configuration to the Note field.  
If you want all Note 1 fields to reflect the SIP user name of Line 1, enter `VoiceService.1.VoiceProfile.1.Line.1.SIP.AuthUserName` in **Note 1 Alias**.
3. Click **Update**.

## View Online Devices

You can view location of the online Polycom VVX phones, OBi Edition and Polycom OBi devices in the map.

### Procedure

1. Click **Map**.  
The map shows the devices that are online.
2. Click on a marked location.  
A sampling of devices matching the selected location shows below the map.
3. Click the device link to explore the current state of the device.

## View Device Snapshots

You can view device snapshots that provide information including device model, SP status, SP proxy, firmware, Base Profile, country, region, and origin AS.

## Procedure

1. Click **Snapshot**.
2. View the device information.

You can view each facet category by clicking on the corresponding entry or pie chart segment. The facet charts are cross-linked.

# Troubleshooting

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## Topics:

- [Troubleshooting Polycom VVX Phones with UC Software](#)
- [Troubleshooting Polycom VVX Phones, OBi Edition](#)

This section describes how to perform troubleshooting tasks on Polycom phones with PDMS-SP.

## Troubleshooting Polycom VVX Phones with UC Software

### Fetch Device Log

You can fetch the content in the phone's log buffer and download the logs for troubleshooting.

#### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Troubleshooting** tab from the right panel.
4. Click **Fetch Device Log**.

The PDMS-SP cloud service portal fetches and stores the most recent logs uploaded by the Polycom VVX phone.

### Set Logging Configuration

You can change the log level for the device.

#### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Troubleshooting** tab from the right panel.
4. Click **Set Logging Configuration**.
5. Change the log level from the **Value** for each log item if needed.

### Fetch Tech Support Info Dump

If the phone detects a crash, it may upload a `.tsid` file to PDMS-SP. The file appears as a link so that you can save it or provide it to Polycom support for troubleshooting.

**Procedure**

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Troubleshooting** tab from the right panel.
4. Click the `.tsid` file to download the file.

**Perform Remote PCAP for Polycom VVX Phones with UC Software**

You can perform remote PCAP and download the PCAP file for troubleshooting.

Remote PCAP is only available if the PCAP feature has been enabled in the Polycom VVX phone configuration file.

**Procedure**

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Troubleshooting** tab from the right panel.
4. Set a timer of capture in **Timeout**. Units are in seconds.
5. Specify the packet filters based on libpcap syntax in **Filter**.
6. Click **Start PCAP** to initiate remote PCAP capture.
7. Click **Stop PCAP** to stop remote PCAP capture.

The system provides a downloadable link of the captured PCAP file.

**Related Links**

[Onboard a Polycom VVX Phone Using a Configuration Profile](#) on page 10

**Troubleshooting Polycom VVX Phones, OBi Edition****Perform Speed Test**

You can test the upload and download speed.

**Procedure**

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Troubleshooting** tab from the right panel.
4. Click **Speed Test**.
5. Click **Start**. The test takes around one minute.

The system shows the result automatically.

## Perform SIP ALG Test

SIP Application Layer Gateway (ALG) test can assist in determining if SIP ALG is modifying SIP communication with the device.

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Troubleshooting** tab from the right panel.
4. Click **SIP ALG Test**.
5. Click **Activate**. It takes a while for the test to take effect.  
If possible, you can make a call from the device and call into the device during the test.
6. Click **Deactivate**.

System shows the test result on the status of each SIP registered account.

## Record Syslog

You can capture the device syslog from PDMS-SP.

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Troubleshooting** tab from the right panel.
4. Click **Record Syslog**.
5. Click **Start Capture**.  
System starts to capture the system log from the device. The capture works in the background, even if you leave the page and sign out of the PDMS-SP.
6. Click **Stop Capture** to terminate the capture. Device sends the system log records to PDMS-SP.

## View All Devices with Syslog Capture Enabled

You can view all devices that have syslog capture enabled.

### Procedure

1. Go to **Tools > Syslog Capture**.
2. Click **List all devices with syslog capture enabled** .  
The PDMS-SP displays a list of devices that have syslog capture enabled. You can click on a specific device to stop the syslog capture or download the syslog capture.

## Perform Remote PCAP for Polycom OBi Devices

You can perform remote PCAP on the Polycom OBi devices and download the PCAP file for troubleshooting.

### Procedure

1. Click **Manage Devices**.
2. Click the **Device ID** of the device that you want to manage.
3. Click the **Troubleshooting** tab from the right panel.
4. Click **PCAP** to initiate remote PCAP capture.
5. Click **Stop Capturing** to stop remote PCAP capture.  
System provides a downloadable link of the captured PCAP file.

# Organization Management

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## Topics:

- [Create a New Organization](#)
- [Edit an Organization](#)
- [Manage the Organization's Users](#)

You can arrange your PDMS-SP management portal in such a way that you can partition a group of Polycom devices and only have a selected pool users access it.

Organizations are arranged into hierarchies. Parent organizations may have sub-organizations, each of which can have further sub-organizations. This hierarchical structure gives service providers greater flexibility in managing their device deployments. The arrangement of sub-organizations can be modelled to reflect an organizational structure within the company, geographically categorizing deployments, giving resellers access to the devices they want to manage (for example, a white label reseller model), and many more.

Each organization, whether a root organization or a sub-organization, contains its own set of dedicated resources: devices, email accounts of users, and a default base profile.

## Create a New Organization

You can create organizations to group your devices.

### Procedure

1. Click **Manage Organization**.
2. Click **+ Create New Organization**.
3. Configure the organization parameters shown in the following table:

Parameter	Description
Organization Name	Specify the organization name.
Allow Create Sub-Organization	Specify whether the organization can create a sub-organization.
Description	Specify description for the organization.

4. Click **Create Organization**.

## Edit an Organization

You can edit the organization parameters and apply a Base Profile to the organization.

**Procedure**

1. Click **Manage Organizations**.
2. Click **Edit**.
3. Edit the organization parameters shown in the following table:

Parameter	Description
Organization Name	Specify the organization name.
Description	Specify description for the organization.
Allow Create Sub-Organization	Specify whether the organization can create a sub-organization.
Default Base Profile	Apply a Base Profile to the organization. The Base Profile pushes to all the devices under the organization.

4. Click **Save Changes**.

## Manage the Organization's Users

You can manage the role permissions of the organization.

**Procedure**

1. Click **Manage Organizations**.
2. Click on the desired organization.
3. Click **Manage Permissions** to manage the users, user roles, and role permissions of the organization.

**Related Links**

[User Management](#) on page 32

# User Management

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## Topics:

- [Create a New Role](#)
- [Edit a Role](#)
- [Delete a Role](#)
- [Add an Existing PDMS-SP User](#)
- [Invite a User](#)
- [Delete a User](#)

You can add users and roles to control user privileges.

With roles and role permissions, you can restrict a specific user from the features in PDMS-SP.

## Related Links

[Manage the Organization's Users](#) on page 31

## Create a New Role

You can create a role with specified permissions.

### Procedure

1. Click **Manage Permissions**.
2. Click **Create New Role**.
3. Specify the user role name in **Role Name**.
4. Select the permissions that you want to assign to the user role.
5. Click **Save**.

## Edit a Role

You can edit a role.

### Procedure

1. Click **Manage Permissions**.
2. Click **Edit** on the corresponding row for the role that you want to modify.
3. Update the user role information that you want to edit.
4. Click **Save**.

## Delete a Role

You can delete an existing role.

### Procedure

1. Click **Manage Permissions**.
2. Click **Delete** on the corresponding row for the role that you want to delete.
3. Click **OK**.

## Add an Existing PDMS-SP User

You can add a new user who is already an existing PDMS-SP user to the PDMS-SP portal.

### Procedure

1. Click **Manage Permissions**.
2. Click **Add User**.
3. Enter the email address of the registered PDMS-SP user in **Add a user already registered on PDMS-SP**.
4. Click **Add**.

## Invite a User

You can invite a user not yet registered on PDMS-SP portal.

### Procedure

1. Click **Manage Permissions**.
2. Click **Add User**.
3. Add the email address of a new user by email address under **Invite a user not yet registered on PDMS-SP**.
4. Click **Add**.

PDMS-SP sends an invite email to the recipient email address, and the invite email contains instructions on how to create a password and validate the email address.

## Delete a User

You can delete a user from the PDMS-SP.

### Procedure

1. Click **Manage Permissions**.

2. Click **Delete** on the corresponding row for the user that you want to delete.
3. Click **OK**.

# Provisioning and Updating Polycom VVX Phones, OBi Edition with PDMS-SP

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## Topics:

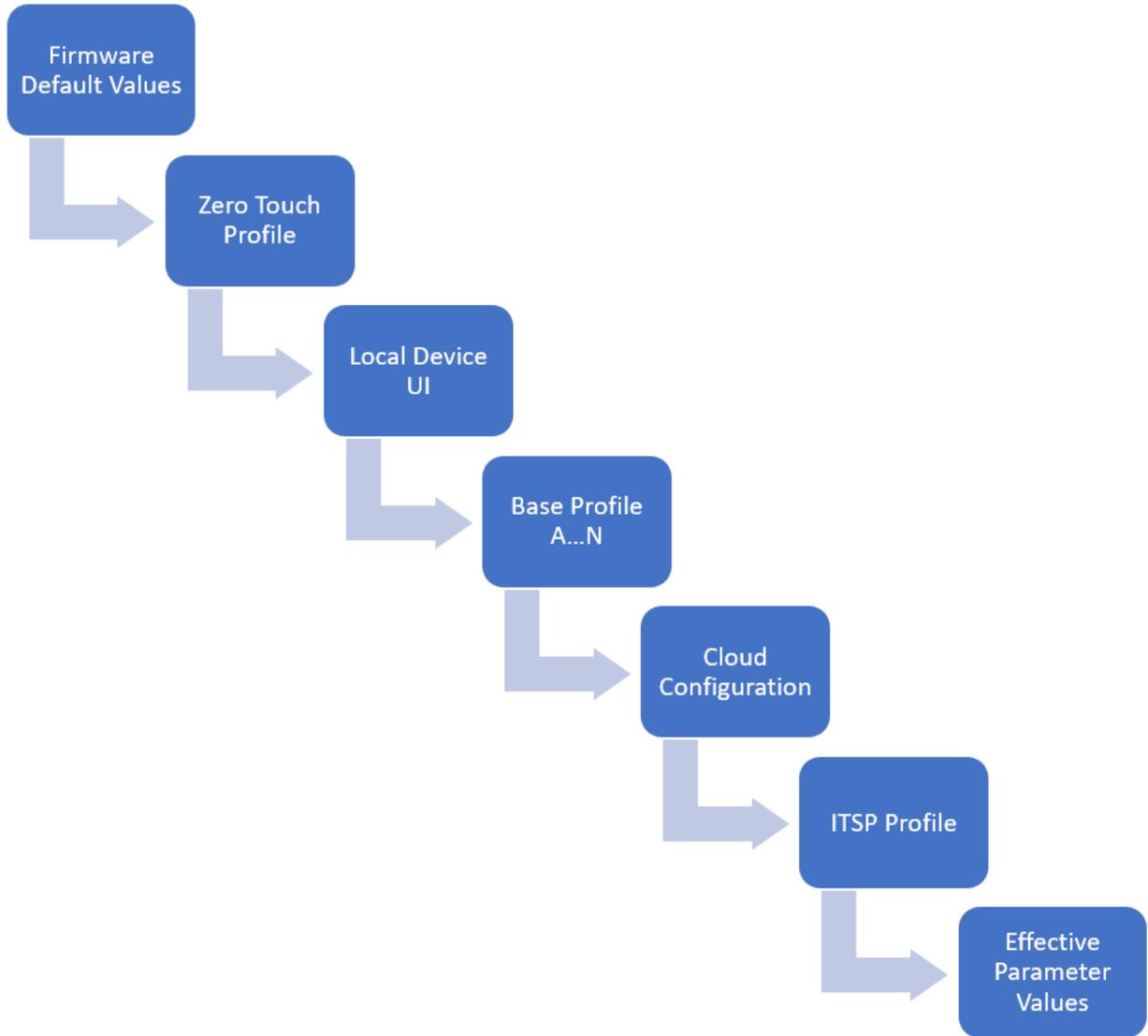
- [Using PDMS-SP to Provision Polycom VVX Phones, OBi Edition](#)
- [Updating Polycom VVX Phone, OBi Edition Firmware](#)

You can provision and update Polycom VVX phones, OBi Edition using the PDMS-SP portal.

## Using PDMS-SP to Provision Polycom VVX Phones, OBi Edition

Polycom VVX phones, OBi Edition can adopt multiple configuration sources, but a device can only take one final value for every parameter. If you push multiple configuration files to a device, they conflict with each other.

To effectively work around this provisioning design, there is an order of precedence on how the device applies configuration files. Each consecutive level of configuration can change the values, starting from the built-in default parameters in the firmware. If a configuration level doesn't explicitly include a parameter, the previous value for that parameter carries over to the next level. The device updates each parameter value independently of other parameters.



**Parameter Configuration Profile Precedence**

Configuration Profile	Description
Firmware Default Values	<p>Each parameter has a default value built into the firmware.</p> <p>Polycom recommends that all subsequent configuration profiles include only few settings that are meaningful at that level, leaving all other parameters at default, as set by the firmware. Never create full profiles using the subsequent configuration profiles.</p>

Configuration Profile	Description
Zero Touch Profile	<p>Use Zero-Touch (ZT) profiles to set parameters to a designated default value. This is a one-time process that only occurs when you first turn the device online.</p> <p>A ZT profile is not the same as a base profile. The parameter values on the ZT profile come as a default for the device, but the base profile changes the parameter values away from the default parameter values. ZT is also a one-time process at initial onboarding, while you can continuously change base profiles.</p>
Local Device UI	<p>Don't configure a device in a production deployment using the local device UI. Instead, provision devices using a combination of base profiles, cloud configurations, and ITSP provisioning.</p> <p>A factory reset operation on the device (via <code>***,8,1</code> or through the UI menu on a phone) clears only this configuration layer.</p> <p>To set a parameter by the local device UI, clear the default flag and specify a value for that parameter.</p>
Base Profiles	<p>A base Pprofile is a set of commands provided by secure XML that change parameters from their default values. With base profiles, you don't have to individually change the parameters of your devices one-by-one.</p> <p>You can apply base profiles individually or jointly when set as a container. If you use a container, the device applies component profiles in the order listed within the container resource.</p>
Cloud Configuration (Polycom VVX phones, OBi Edition only)	<p>The parameters that control cloud provisioning are under <code>X_DeviceManagement.Provisioning</code>. Polycom recommends that you leave this parameter untouched or set it as the default in the ITSP provisioning layer.</p> <p>An cloud configuration reset operation clears both this configuration layer and the local device layer.</p> <p>To set a parameter through the cloud portal, clear the <b>wizard</b> flag, and specify a value for that parameter or click <b>default</b> to set it to the default value.</p>

Configuration Profile	Description
ITSP Profile (Polycom VVX phones, OBi Edition only)	Configure access to the ITSP provisioning server using the X_DeviceManagement.ITSPProvisioning.* parameters. Polycom recommends provisioning those parameters that should differ from their default settings, and which are not already configured by either base profiles or cloud configurations.
Effective Parameter Values	The final parameter setting. You can view these settings through the <b>Local Configuration</b> screen on the PDMS-SP device page. You can also view these values through a web browser on the local device UI at <a href="http://&lt;Device IP Address&gt;">http://&lt;Device IP Address&gt;</a> .

## Zero-Touch Profiles

When you purchase a brand new Polycom device, you can assign the device a Zero-Touch (ZT) customization profile.

Zero-Touch is a process where PDMS-SP provisions a new device with customized default values for a small subset of configuration parameters and make it the device's default value. ZT is a one-time process that takes place when you connect the phone to the internet and it accesses the PDMS-SP network for the first time.

A normal device configuration file specifies the set of customized default parameter values. After you apply ZT, you can configure the device normally. If you factory reset the device, the device can revert back to the customized default values.

Polycom Support can help generate a ZT profile for the service provider. Contact [obi.spsupport@polycom.com](mailto:obi.spsupport@polycom.com) for assistance.

There are two different labels of a ZT status for every device: **Yes** and **N/A**. Where a **Yes** means the device has a ZT customization profile in place, an **N/A** profile means there is no customization at the Zero Touch configuration profile layer. Devices with N/A profiles are not committed to any PDMS-SP account

When a device with an N/A profile has undergone a factory reset, the device can not recover to the PDMS-SP portal. In this case, add the device again by **Add Device** to get provisioning from PDMS-SP. The PDMS-SP stores the specific configuration it previously had.

Polycom VVX phones running UC Software do not use the Zero Touch Profiles (ZT Profiles) in PDMS-SP. Currently, they still use the Polycom Zero-Touch Provisioning (ZTP) solution for provisioning server redirection. For more information on ZTP, refer to [Polycom Zero-Touch Provisioning](#) at Polycom Support.

### Related Links

[Factory Reset a Polycom OBi Device](#) on page 17

[Cloud Configuration and Local Configuration](#) on page 38

## Cloud Configuration and Local Configuration

The PDMS-SP cloud has the ability to store and push all parameters and values to devices. The devices themselves also locally store a set of configuration parameters.

Cloud configuration is the configuration stored in the PDMS-SP cloud. By default, the configuration pushes its latest parameter changes to the device's local configuration. The cloud configuration parameters are not in sync with the local configuration parameters if you disable Cloud Provisioning on the Polycom VVX phone, OBi Edition configuration.

The local configuration is the true configuration of the phone. You can use the local configuration to verify that the PDMS-SP cloud has pushed parameters in the cloud configuration to your phone or phone adapter. When you enable Cloud Provisioning, the cloud configuration parameters overwrite the local configuration parameters.

### Related Links

[Factory Reset a Polycom OBi Device](#) on page 17

[Zero-Touch Profiles](#) on page 38

## Manage Base Profiles

You can manage and provision your Polycom OBi device using base profiles.

A base profile is a set of commands sent through secure XML that change parameters from their default values. With base profiles, you don't have to individually change the parameters of devices one-by-one. You can assign only one base profile to each device, but you can combine multiple existing base profiles into a container.

One PDMS-SP account supports 60 base profiles, numbered from 0 to 59. You can use base profiles 30 to 59 to combine multiple base profiles that you save.

### Procedure

1. Click **Manage Base Profiles**.
2. Select a base profile that you want to configure from the drop-down list.
3. Configure the following parameters:

Parameter	Description
Download Profile	Download the current base profile to your local PC.
Profile Name	Specify the profile name.
Default Profile	When you select the check box, the profile is the default base profile for new devices.
Profile	Specify the profile content.
Use as container	Only available for base profiles 30 to 59. When you select the check box, the profile works as a container to combine multiple base profiles.

4. Optional: Select profiles that you want to combine from **Available Profiles** to **Contained Profiles** if you selected the **Use as container** check box. This option is only available for base profiles 30 to 59.
5. Click **Update**.

## View ZT Profiles

You can view the ZT profile by device series.

### Procedure

1. Click **ZT Profiles**.
2. Select **Profile Id** for the device series you want to view.  
The profile content displays in **Customization Profile**.

## Updating Polycom VVX Phone, OBi Edition Firmware

You can update Polycom VVX phone, OBi Edition firmware automatically or manually through PDMS-SP.

### Update the Device Firmware Automatically

You can automatically update the device firmware by using a base profile configuration.

### Procedure

1. Log in to the PDMS-SP portal.
2. Click **Manage Base Profiles**.
3. Select the profile that you want to update.
4. Update the FirmwareURL with one of the following firmware links:
  - OBi 3 series: <http://fw.obihai.com/OBi202-x-x-x-xxxx.fw>
  - OBi 5vs series: <http://fw.obihai.com/OBi500-x-x-x-xxxx.fw>
  - OBi 1000 series: <http://fw.obihai.com/OBiPhone-x-x-x-xxxx.fw>

The following is an example of a base profile for firmware upgrade to version 5.0.2.3855 for the OBi1000 series.

```
<?xml version="1.0" encoding="UTF-8"?>
<ParameterList>
  <O>
    <N>X_DeviceManagement.FirmwareUpdate.</N>
    <P>
      <N>Method</N>
      <V>Periodically</V>
    </P>
    <P>
      <N>Interval</N>
      <V>86400</V>
    </P>
    <P>
      <N>FirmwareURL</N>
      <V>IF ( $FWV &lt; 5.0.2.3855 ) FWU http://fw.obihai.com/
      OBiPhone-5-0-2-3855.fw</V>
    </P>
  </O>
</ParameterList>
```

5. Apply the base profile to the device that you want to update.

## Update the Device Firmware Manually

You can update the firmware for a specific device manually.

### Procedure

1. Log in to the PDMS-SP portal.
2. Click **Firmware**.  
The portal shows latest firmware and release notes targeted to service providers and system integrators.
3. Download the firmware version for your device to your local PC.
  - OBi 3 series: <http://fw.obihai.com/OBi202-x-x-x-xxxx.fw>
  - OBi 5vs series: <http://fw.obihai.com/OBi500-x-x-x-xxxx.fw>
  - OBi 1000 series: <http://fw.obihai.com/OBiPhone-x-x-x-xxxx.fw>
4. Click **Choose File** and select the firmware that you downloaded in step 3.

---

**Note:** The file name of the firmware cannot be less than eight characters.

---

5. Click **Upload Firmware**.
6. Click **Manage Devices**.
7. Click the ID of the device that you want to update.
8. Select a firmware version from the **Firmware List**.
9. Click **Update**.