



ADMINISTRATOR GUIDE

| May 2019 | 3725-42461-001M

Poly Cloud Services Portal



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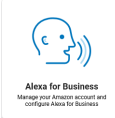

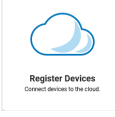
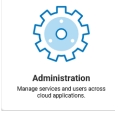
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The Poly Cloud Services Portal

The Poly Cloud Services portal is the central point where you can set up and use Poly Cloud Services.

The Poly Cloud Services portal includes the following features:

Poly Cloud Services

Portlet Name	Description
<p>Alexa for Business</p>  <p>Alexa for Business Manage your Amazon account and configure Alexa for Business.</p>	Manage your Amazon account and configure Alexa for Business.
<p>PDMS-E</p>  <p>PDMS-E Device management for the enterprise.</p>	Device Management Service for your Enterprise.
<p>Register Devices</p>  <p>Register Devices Connect devices to the cloud.</p>	Connect devices to the cloud.
<p>Administration</p>  <p>Administration Manage services and users across cloud applications.</p>	Manage services and users across cloud applications.

Activating Your Company's Initial User Account

Topics:

- [Activate the Initial Account Created with the Welcome Email](#)
- [Create and Activate the Initial Account with a License Activation Key](#)

Your company's initial Poly Cloud Services account may be created as part of the purchase of a Polycom Product or associated cloud service, for example, if you purchased Polycom Pano or a service connecting via Polycom Cloud Relay.

As a new Poly Cloud Services user, you receive a "Welcome to Poly Cloud Services" email message. This welcome email message contains an activation link that guides you through the steps of activating your account.

Important:

If an email address for the initial Poly Cloud Services account was not included with your purchase order, or your Polycom system is shipped to China, Mexico, Brazil, or Argentina, you must activate your Polycom system maintenance service on the [Polycom Support Center](#) and provide an email address before your Poly Cloud Services account can be created.

If you have not received the "Welcome to Poly Cloud Services" email, please contact Polycom Global Services at 1-800-POLYCOM (1-800-765-9266).

If you are a new Poly Cloud Services customer, you can create your account on the **Sign In** screen and activate your product licenses with the License Activation Key you received. To do it, just click the "No account? **Create one.**" link.

The initial Poly Cloud Services user can create additional Poly Cloud Services user accounts for other users in your company from **Users**, assigning them each specific user roles to match the level of access required. The users whose accounts are assigned with the **User Admin** user role can also create and manage Poly Cloud Services accounts.

Tip: Depends on your situation, choose one of the following sub-topics to finish the initial account activation procedure.

Activate the Initial Account Created with the Welcome Email

If you are your company's initial user and your account is created as part of the purchase of a Polycom Product, you can activate it from your welcome email.

Procedure

1. In the "Welcome to Poly Cloud Services" email you received, click **Activate Your Account**.
A browser session will be launched taking you to the **Activate Account** screen.

Note: The activation link in the Welcome email message is valid only for 72 hours. If you click on it after that amount of time, the browser session will instead take you to a page that indicates that the link was no longer valid; a new email message is then sent containing a fresh activation link.

2. Enter your `First Name` and `Last Name` in their respective fields and then create a password in the **Set Password** field.
-

Note: Password must be between 8 and 32 characters in length and must contain at least one uppercase letter, one lowercase letter, one number, and one special character.

3. Re-enter the password in the **Confirm Password** field.
4. Click **Submit**.

Your account is activated and you are redirected to the main **Sign In** screen, where you can sign into your account.

Related Links

[Sign In to Your User Account](#) on page 7

Create and Activate the Initial Account with a License Activation Key

If you are a new Poly Cloud Services customer and have received a License Activation Key, you can create and activate your Poly Cloud Services account and activate your product licenses simultaneously.

To create your new Poly Cloud Services account, go to the main Poly Cloud Services portal at <https://console.plcm.cloud>, find the “No account? **Create one**” text underneath the main sign in area and click the **Create one** link.

Procedure

1. Select **I have a valid Polycom License Activation Key** and click **Next**.
 2. Enter your account information and enter the Captcha displays, then click **Next**.
 3. Create a password by entering it in the **Password** and **Confirm Password** fields, then click **Register**.
-

Note: Password must be between 8 and 32 characters in length and must contain at least one uppercase letter, one lowercase letter, one number, and one special character.

You will then be sent an email message containing a verification link.

4. After you receive the “Welcome to Poly Cloud Services” email message, click **Activate Your Account** in the email message.

You are redirected to the Poly Cloud Services portal.

5. Enter or paste your License Activation Key and click **Continue**.
6. Select the **I agree to the Terms of Service and Privacy Policy** check box and click **Activate License**.

You are redirected to the Poly Cloud Services portal **Sign In** screen, with a message in the upper right corner indicating that your account has been successfully created.

You can now sign in to your account.

Related Links

[Sign In to Your User Account](#) on page 7

Signing Into and Out of the Portal

Topics:

- [Sign In to Your User Account](#)
- [Sign Out](#)

The section includes information about signing into and out of the Poly Cloud Services portal.

Sign In to Your User Account

The Poly Cloud Services portal URL is <https://console.plcm.cloud>. You can also find the URL in your “Poly Cloud Services Account Activated” email message.

Procedure

1. Enter the Poly Cloud Services URL in your web browser.
2. Enter your email address in the **Email Address** field and click **Continue**.
3. If a **Sign In** screen appears, do one of the following:
 - Enter the password for your local account in the **Password** field and click **Sign in**.

Note: This is the only choice for accounts that have not configured the use of an enterprise authentication provider.

- Click a listed authentication provider and sign in with it.
-

Note: This choice is visible only if an enterprise authentication service has been configured.

If an enterprise authentication provider has been configured, the system automatically directs **Enterprise Only** users (configured during adding user account process) to that authentication service for sign in.

4. If you're a guest user of another organization, you can select that organization on the **Select Account** screen when it appears.

Related Links

[Authentication Providers](#) on page 22

Related Links

[Add a New User Account](#) on page 19

Reset Your Password

If you forget your password, you can reset it on the **Sign In** screen.

Procedure

1. On the Poly Cloud Services **Sign In** screen, enter your email address in the **Email Address** field and click **Continue**.

2. When the **Sign In** screen reappears, click **Forgot Password**.
3. On the **Forgot Password** screen, ensure that your correct email address is shown in the **Enter your email address** field and then click **Submit**.
A “Reset Password Request” email message is then sent to your email address.
4. Open the email and click **Set a New Password**.
You are redirected to the **Reset Password** screen.
5. Create a password in the **Set Password** field.

Note: Password must be between 8 and 32 characters in length and must contain at least one uppercase letter, one lowercase letter, one number, and one special character.

When the password is successfully reset, you are redirected to the **Sign In** screen, and a “Password Changed” email message is sent to you confirming that your password was changed.

Sign Out

You can sign out your account from the account menu. For security reasons, you are automatically signed out after 1 hour of inactivity.

Procedure

1. In the Poly Cloud Services portal, click the account menu (the pull-down menu labeled with your user name in the upper-right corner of your screen).
2. Select **Sign Out**.

Registering Devices

Topics:

- [Monitoring Polycom Pano and Polycom Cloud Relay](#)
- [Managing Polycom Cloud Relay](#)
- [Edit or Delete a Registered Polycom Pano or Polycom Cloud Relay](#)

You can integrate on-premises services and devices into your cloud services using **Cloud Relay**  devices and manage your content devices (**Pano** ) in the **Register Devices** portlet.



You must have either the **Device Admin** or **Device Operator** role assigned to your user account to access these cloud devices.

Monitoring Polycom Pano and Polycom Cloud Relay

Polycom Pano and Polycom Cloud Relay have similar device attributes.

The system lists each registered device in a table with the following information:

Registered Device Information

Device Information	Description
Status	Icon that indicates the registration status of the device: <ul style="list-style-type: none">▪  (Online) — Indicates that the device is currently connected to the Poly Cloud Services▪  (Offline) — Indicates that the device has been disconnected from the Poly Cloud Services
Device Name	Device name
Type	Device type <ul style="list-style-type: none">▪ Pano▪ Cloud Relay
IP Address	Device IPv4 address Tip: Clicking on the address of the Polycom Pano device establishes a web UI session (a separate tab in your browser) to the Polycom Pano device.
Room Name	Room name of the Polycom Pano device. It isn't relevant to the Polycom Cloud Relay.
Software Version	Device software version

Device Information	Description
Serial Number	Device serial number

You can click **Refresh** to refresh the list manually.



Managing Polycom Cloud Relay

You can manage Polycom Cloud Relay in Poly Cloud Services portal.

Download a Polycom Cloud Relay Image

You can download the Hyper-V or OVA image of the Polycom Cloud Relay from the Poly Cloud Services portal.

Procedure

1. In the Poly Cloud Services portal, go to **Register Devices > Cloud Relay**.
2. Click **Polycom Cloud Relay Download** .
3. Click the **License Agreement** and **Export Restrictions** links to read related information, then select the **I agree to the License Agreement and Export Restrictions** check box.
4. Verify the following information of the Hyper-V or OVA image:
 - Current Release Version
 - Release Date
 - MD5 Checksum
5. Click **Download**  next to **Hyper-V** or **OVA** to download the image you need for your system.
6. Click **Release Notes** and **Deployment Guide** links to read more information about Polycom Cloud Relay.

Add Polycom Cloud Relay

After doing the initial Polycom Cloud Relay installation and configuration via the Polycom Cloud Relay Command Line Interface (CLI), you can add the Polycom Cloud Relay to your Poly Cloud Services account.

Procedure

1. Retrieve the Registration Code from the Polycom Cloud Relay using its CLI.
The Poly Cloud Services URL and the Registration Code display together in the connecting to cloud step.
2. In the Poly Cloud Services portal, go to **Register Devices > Cloud Relay**.
3. Click **Add**.
4. From the **Type** drop-down list, select **Cloud Relay**.
5. Enter following device information:

Device Information	Description
Device Name	Can contain any Unicode string up to 40 characters
Registration Code	Registration Code you retrieved from the Polycom Cloud Relay CLI

- When the Polycom Cloud Relay provisioning completes, return to the Polycom Cloud Relay CLI and finish the registration steps.

For more information on registration in Polycom Cloud Relay CLI, refer to [Polycom Cloud Relay Deployment Guide](#)

Related Links

[License Management](#) on page 27

Install a Server Identity Certificate on Polycom Cloud Relay

When initially installed, the Polycom Cloud Relay uses a default self-signed server identity certificate on all HTTPS connections from on-premise devices and applications to its HTTPS port (443). You can replace this default certificate with your own.

Your certificate must be contained in a PKCS #12 format file (typically a .pfx or .p12 file extension), which includes the certificate and its associated private key. This file should also contain all of the CA certificates in the certification path.

Note: Not all Poly Cloud Services require a certificate. Please see your respective [documentation](#) for more information on whether your service requires a certificate.

Procedure

- In the Poly Cloud Services portal, go to **Register Devices > Cloud Relay**.
- Click a specific Polycom Cloud Relay.
- In the **Advanced Settings** section, move the slider to **Yes** to expose the certificate settings.
- In the **Device Certificate Password** field, enter the certificate file password (the password you entered when you exported the PFX or P12 file).
- In the **Device Certificate (.PFX)** field, click **Upload** to select the certificate file on your computer.

Certificate Status shows you whether your certificate is valid or invalid.

If your certificate was uploaded successfully, you will see a summary of the certificate information, followed by the raw certificate data itself. The certificate summary information contains the following:

Certificate Information	Description
Common Name	The Subject Common Name (CN) field value
Validity Time	Certificate validity period
Serial Number	Certificate serial number

Edit or Delete a Registered Polycom Pano or Polycom Cloud Relay

You can edit a few device attributes or delete the device in the **Register Devices** portlet.

Procedure

1. In the Poly Cloud Services portal, go to **Register Devices > Pano** or **Register Devices > Cloud Relay**.
2. You can click **Refresh** to refresh the list manually.
3. Click the device name that you want to edit.

When you click the device name, additional device information displays in a configuration tab and you can edit part of the properties.

Editable Device Properties

Properties	Description
Device Name	Can contain any Unicode string up to 40 characters
Room	Can contain any Unicode string up to 40 characters This field doesn't display for the Polycom Cloud Relay.
Security Code Required	Controls whether a security code is required to connect to the Polycom Pano device This field doesn't display for the Polycom Cloud Relay.

Read-only Device Properties

Properties	Description
ID	Device ID
Status	Device status
MAC Address	Device MAC address This field doesn't display for the Polycom Cloud Relay.
Serial Number	Device Serial Number
IPv4	Device IPv4 IP address
IPv6	Device IPv6 IP address
Software Version	Device software version
Hardware Version	Device hardware version This field doesn't display for the Polycom Cloud Relay.

4. Modify the editable device properties and do one of the following:
 - Click **Save** to save the changes, then click **>** to close the configuration tab.

- Click **Cancel** to cancel the changes.
5. To delete a registered device, click **Delete**.

Cloud Services

Topics:

- [Alexa for Business](#)
- [PDMS-E](#)

You may need proper licenses or permissions to access different cloud services.

Alexa for Business

If you have added Polycom Trio devices to your Poly Cloud Services account, you can link your Poly Cloud Services account to your Amazon Web Services (AWS) account and then add the Alexa for Business service to these Polycom Trio devices.

Enable the Alexa for Business Service

You can enable the Alexa for Business service for Polycom Trio devices registered to your Poly Cloud Services account.

For more information about using the Alexa for Business service with Polycom Trio, see the [Polycom Trio Systems with Alexa for Business Deployment Guide](#).

Procedure

1. In the Poly Cloud Services portal, go to **Alexa for Business**.
2. Next to **Allow devices to enable Alexa for Business**, move the slider to **Yes**.
3. Click the **Amazon Web Service > Alexa for Business > AVS Permissions** link to sign in to your AWS account.
4. Go to **Alexa for Business > AVS Permissions**, create an IAM role, and download its CSV file to your computer.

For more information about administration functions in your AWS Alexa for Business account, see the [Alexa for Business Administration Guide](#).

5. Return to the Poly Cloud Services portal and click **Upload Amazon CSV**.
6. Go to the location of the saved IAM role CSV file, select it, and click **Open** to upload the file.
7. Click **Test**.

The system indicates that the test is successful. If you don't get a successful result when testing the uploaded IAM role file, try regenerating it on your Alexa for Business portal and upload it again. If it continues to fail, contact your Polycom support representative.

8. Click **Save**.

Disable the Alexa for Business Service

You can disable the Alexa for Business service.

Before disabling the Alexa for Business service, read the following notes:

- Disabling the Alexa for Business service will unregister all Polycom Trio devices in the Polycom Cloud Service account from the Alexa for Business service.

- When you disable the service, you can choose to delete the IAM role from the Poly Cloud Services account or keep it.
 - Choose to keep the IAM role if you want to re-enable the Alexa for Business service using the same IAM role without uploading a new Amazon CSV.
 - Choose to delete the IAM role if you won't re-enable the service or you want to use a different Alexa for Business account.

Procedure

1. In the Poly Cloud Services portal, go to **Alexa for Business**.
2. Next to **Allow devices to enable Alexa for Business**, move the slider to **No**.
3. Click on **Delete** if you want to delete the IAM role from the Poly Cloud Services account.

PDMS-E

The Polycom Device Management Service for Enterprise (PDMS-E) service allows you to manage, monitor and troubleshoot issues with all of your Polycom devices.

While some functions in PDMS-E are free, others require that you have an active **PDMS-AUDIO** license, and you must be either a **Device Admin** or a **Device Operator** to use the **PDMS-E** functions.

For more information, see the *Polycom Device Management Service for Enterprise Administrator Guide* from the [Cloud Services Documentation Library](#).

Administration

Topics:


- [Account Management](#)
- [User Management](#)
- [View Activity Logs](#)
- [Authentication Providers](#)
- [License Management](#)
- [Domain Management](#)

You can administer your organization's cloud services in **Administration**.

The **Administration** tile provides the following basic functions:

- Updating your current account information and creating sub-accounts.
- Creating and managing Poly Cloud Services user accounts.
- Checking all administrators' activity logs.
- Integrating with your company's enterprise user management services, such as Microsoft Office 365 service.
- Activating and monitoring cloud device or service licenses.
- Managing multiple domains for your enterprise and your partner organizations.

Account Management


You must have the **Enterprise Admin** role assigned to your user account to access the **Account Management**  functions.

You can update your current Poly Cloud Services account name or create sub-accounts for your current account.

Copy Your Current Account ID

You may need to provide your current account ID when you report a Poly Cloud Services issue. You can copy it from your account information in the Poly Cloud Services portal.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Account Management > Account Information**.
2. Click **Copy to Clipboard**  to copy the string next to **Account ID**.
3. Paste the string into a text file and save it to your local system.

Edit Your Current Account Name

You can edit your account name in the Poly Cloud Services portal.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Account Management > Account Information**.
2. Click **Edit** [↗](#).
3. Edit your current account name and click **Save**.

Sub-Accounts

You can create sub-accounts for customizing cloud services for different groups of users.

Create a Sub-Account

You can create sub-accounts associated with your current Poly Cloud Services account.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Account Management > Sub-Accounts**.
2. Click **Add**.
3. Configure the following information:

Field	Description
Account Name	The account name for the sub-account
Email Address	The email address for the sub-account

4. Click **Save**.

Access a Sub-Account

You can access a sub-account to administer the services and users within the sub-account.

Even though administrators assigned with the **Enterprise Admin** role can access account management functions, you must add them as a user in the sub-account before they can access it.

Note: The administrator that creates a sub-account is automatically added as a user within the sub-account; other administrators must be added manually to the sub-account as needed.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Account Management > Sub-Accounts**.
2. Click a specific sub-account name.
3. Click **Go to Sub-Account** to access this sub-account.

Update a Sub-Account**Procedure**

1. In the Poly Cloud Services portal, go to **Administration > Account Management > Sub-Accounts**.

2. Click a sub-account name in the **Account Name** column.
3. Update the sub-account information in the **Account Name** field; you cannot modify the contents of the **Email Address** field.
4. Click **Save**.

Delete a Sub-Account

Procedure

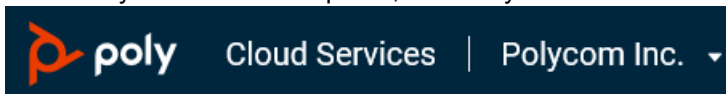
1. In the Poly Cloud Services portal, go to **Administration > Account Management > Sub-Accounts**.
2. Click a sub-account name in the **Account Name** column.
3. Click **Delete**.

Change Your Account

You can toggle between accounts from the top of your screen.


Procedure

1. In the Poly Cloud Services portal, click on your account name on the top of your screen.



2. In the **Change Account** window, select another account and click **Confirm**.

User Management

You must have the **User Admin** role assigned to your user account to access the **Users**  functions.

User accounts have different permissions and sign in capabilities depending on the **User Role** and **Sign In Account** settings that you select for them.

Each user is listed in a table with the following information:

User Information

User Information	Description
User Name	User's name and email address
Sign In Account	Sign in account type: <ul style="list-style-type: none"> ▪ Enterprise Only ▪ Enterprise and Local
User Role	User roles assigned to the user account. These are associated with various access permissions within the Poly Cloud Services portal.

You can click **Refresh** to refresh all the device information manually.

Add a New User Account

You can add additional Poly Cloud Services user accounts using the users' email addresses.

Users can be from your own organization (meaning they have email addresses from one of the domains associated to your Poly Cloud Services account), or from partner or external organizations (with email address domains outside of those associated with your account)—these users are considered **Guest** users.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Users**.
2. Click **Add**.
3. Enter the user's email address in the **Email Address** field.
4. In the **User Role** field, select one or more predefined user roles for the new account.

User Role	Permissions
Device Admin	The role provides full access to Register Devices and use PDMS-E functions.
Device Operator	The role provides read-only access to connected devices.
Enterprise Admin	The role provides full access to the Administration > Account Management , Authentication Providers and Domain Management functions.
License Admin	The role provides full access to the Administration > Licenses functions.
User Admin	The role provides full access to the Administration > Users functions.
OTD Admin	The role provides administer access to the Polycom One Touch Dial (OTD) service. For more information, see the Polycom One Touch Dial Support Documentation .

5. In the **Sign In Account** field, select one of the following account types.

You can select the **Sign In Account** type only when you add a new user from your organization. If you add a guest user from another organization, you can't select this field.

Account Type	Description
Enterprise and Local	Enables users to sign in using either their Poly Cloud Services account credentials or their enterprise account credentials from any of the configured authentication providers. This is the only option the service provides when you haven't configured any external authentication providers. Polycom recommends that you configure some users with this sign in type so that they can always sign in with their local account credentials if enterprise authentication service temporarily fails.
Enterprise Only	Enables users to sign in using their enterprise account credentials from any of the configured authentication providers. This option is available only when you configure at least one external authentication provider. Select this option for users who don't need a local account and can use their enterprise account credentials exclusively.

6. Click **Save**.

If you add a guest user from another organization, the user's **Sign In Account** field changes to **Guest** automatically.

A new user from your organization receives one of the following welcome email messages, depending on the account type you selected.

- If you selected **Enterprise and Local** in the **Sign In Account** field, the user receives a welcome email message with an activation link to begin activating the Poly Cloud Services account.
- If you selected **Enterprise Only** in the **Sign In Account** field, the user receives a welcome email message indicating the system added the user as an administrative user and to use the user's enterprise account credentials when signing in.

A new guest user from another organization receives a welcome email message indicating the system added the user as an administrative user to your organization.

Related Links

[Sign In to Your User Account](#) on page 7

Activate the New or Changed User Account

You can activate your Poly Cloud Services account from your welcome email.

Procedure

1. In the "Welcome to Poly Cloud Services" email you received, click **Activate Your Account**.
A browser session will be launched taking you to the **Activate Account** screen.

Note: The activation link in the initial Welcome email message is valid only for 72 hours. If you click on it after that amount of time, the browser session will instead take you to a page that indicates that the link was no longer valid; a new email message is then sent containing a fresh activation link.

2. Enter your name in **First Name** and **Last Name** fields.
3. Create a password in the **Set Password** field.

Note: Password must be between 8 and 32 characters in length and must contain at least one uppercase letter, one lowercase letter, one number, and one special character.

4. Re-enter the password in the **Confirm Password** field.
5. Click **Submit**.
Your account is activated and you are redirected to the main **Sign In** screen.
6. Enter your email address in the **Email Address** field and click **Continue**.
7. When the **Sign In** screen reappears, do one of the following:
 - Enter your password in the **Password field** and click **Sign in**.
 - Click a listed authentication provider and sign in with it.
8. If you're a guest user of another organization, you can select that organization on the **Select Organization** screen when it appears.

Edit a User Account

You can edit the properties of a Poly Cloud Services user account.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Users**.
2. Click **Refresh** to refresh the list manually.
3. Click the user's name that you want to edit.
4. In the user account configuration section, configure the required fields for the user, and do one of the following:
 - Click **Save** to save the changes, then click **>** to close the configuration tab.
 - Click **Cancel** to cancel the changes.

The user receives different notification email messages depending on the **Sign In Account** type changes you make, as follows:

- If you changed the account type to **Enterprise and Local**, the user receives a welcome email with an activation link to begin activating the Poly Cloud Services local account.
- If you changed the account type to **Enterprise Only**, the user receives a deactivation email indicating the Poly Cloud Services local account has been deactivated.

Activate the New or Changed User Account

You can activate your Poly Cloud Services account from your welcome email.

Procedure

1. In the "Welcome to Poly Cloud Services" email you received, click **Activate Your Account**.
A browser session will be launched taking you to the **Activate Account** screen.

Note: The activation link in the initial Welcome email message is valid only for 72 hours. If you click on it after that amount of time, the browser session will instead take you to a page that indicates that the link was no longer valid; a new email message is then sent containing a fresh activation link.

2. Enter your name in **First Name** and **Last Name** fields.
3. Create a password in the **Set Password** field.

Note: Password must be between 8 and 32 characters in length and must contain at least one uppercase letter, one lowercase letter, one number, and one special character.

4. Re-enter the password in the **Confirm Password** field.
5. Click **Submit**.
Your account is activated and you are redirected to the main **Sign In** screen.
6. Enter your email address in the **Email Address** field and click **Continue**.
7. When the **Sign In** screen reappears, do one of the following:
 - Enter your password in the **Password field** and click **Sign in**.
 - Click a listed authentication provider and sign in with it.
8. If you're a guest user of another organization, you can select that organization on the **Select Organization** screen when it appears.

Delete a User Account

You can delete a user account.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Users**.
2. Click the user you want to delete.
3. Click **Delete**.

When you delete a user's account, the user receives an email notification of the account deletion.

- Deleting your organization user's account, the user can't access all organizations.
- Deleting a guest user's account, the user can't access your organization, but the user still can sign into other tenants.

View Activity Logs

Activity Logs  is where you can view previous operations performed by you or other users.

You must have the **User Admin** user role to view previous operations performed by all users. Without **User Admin** user role, you can only view your own previous operations.


Note: The Poly Cloud Services portal clears activity logs if logs are older than 7 days.

You can identify user activities that may cause Poly Cloud Services issues, then report the activities and your organization account ID to your Polycom support representatives for further investigation.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Activity Logs**.
2. Click **Refresh** to refresh the list manually.

Authentication Providers

Authentication Providers  allow users to sign in to the Poly Cloud Services using their user account credentials from an enterprise user authentication service such as Microsoft Office 365 (Microsoft Azure Active Directory) or an on-premises Microsoft Active Directory service (federated for Poly Cloud Services access via ADFS).

After an authentication provider is configured, the Poly Cloud Services users can sign into the Poly Cloud Services portal using their enterprise account credentials or their local account credentials.

You can connect the Poly Cloud Services to any of the following custom and built-in authentication providers:

- | | |
|----------------------------|---|
| Built-in Office 365 | A pre-configured authentication provider that provides federation with Microsoft Office 365/Microsoft Azure Active Directory. |
| Custom Office 365 | A custom authentication provider that can provide federation with Microsoft Office 365/Microsoft Azure Active Directory that you can configure to meet special federation requirements. |
| Custom ADFS | A custom authentication provider that provides federation with Microsoft Active Directory Federation Services 3.0 that you can configure to match the specific requirements of your organization's Active Directory deployment. |

- Custom Okta** A custom authentication provider that provides federation with the Okta Authorization Server that you can configure to meet special federation requirements.
- Custom OneLogin** A custom authentication provider that provides federation with the OneLogin authentication service that you can configure to meet special federation requirements.

Poly Cloud Services uses the [OAuth 2.0](#) authorization framework to integrate with the above authentication providers.

Related Links

[Sign In to Your User Account](#) on page 7

Enable or Disable the Built-In Office 365 Authentication Provider

This Built-In Office 365 authentication provider is preconfigured to allow the Poly Cloud Services to use the authentication services of your company's Microsoft Office 365 subscription, without any custom configuration operations being required.

It is configured to request the following delegated permissions from your company's Azure AD: Sign in and read user profile - Microsoft Graph API.


Procedure

1. In the Poly Cloud Services portal, go to **Administration > Authentication Providers**.
2. In the **Built-in Authentication Providers** section, enable or disable the built-in Office 365:
 - To enable it, click **Office 365**  (Inactive), then click **Enable**.
 - To disable it, click **Office 365**  (Active), then click **Disable**.

Add Office 365 as a Custom Authentication Provider

The Custom Office 365 provider allows you to configure your own custom federation between the Poly Cloud Services and your company's Office 365-based user authentication service, tailoring the scope and duration of the federation to meet your needs.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Authentication Providers**.
2. In the **Custom Authentication Providers** section, click **Office 365**  (Inactive).
3. Register the Poly Cloud Services as an OAuth 2.0 client. Your Active Directory administrator should register the service using the **Redirect URL** (see table below).
4. Configure the required fields for the authentication provider.

Office 365

Setting	Description
Name	Authentication provider name
	Note: Your users see this name when they sign in using the Polycom Pano App.


Setting	Description
Client ID	<i>Application ID</i> created for the Poly Cloud Services as part of registering it within Microsoft Azure Active Directory
Client Secret	API Access Key created for the Poly Cloud Services as part of registering it within Microsoft Azure Active Directory Note: Make sure you save the Client Secret in a secure location. Once you entered the Client Secret, you can't retrieve it from the Poly Cloud Services portal.
Tenant ID	Microsoft Azure Active <i>Directory ID</i>
Redirect URL	This is a read-only field. Supply the Redirect URL to your Microsoft Azure Active Directory administrator as it is required for registering the Poly Cloud Services within Microsoft Azure Active Directory.

5. Click **Save**.

Add ADFS as a Custom Authentication Provider

The Custom ADFS provider allows you to configure your own custom federation between the Poly Cloud Services and your company's Active Directory-based user authentication service, tailoring the scope and duration of the federation to meet your needs.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Authentication Providers**.
2. In the **Custom Authentication Providers** section, click **ADFS**  (Inactive).
3. Register the Poly Cloud Services as an OAuth 2.0 client. Your Active Directory administrator should register the service using the **Callback URL** (see table below).
4. Configure the required fields for the authentication provider.

ADFS

Setting	Description
Name	Authentication provider name Note: Your users see this name when they sign in using the Polycom Pano App.
Client ID	Client Application ID is used to register the Poly Cloud Services as an ADFS OAuth 2.0 client. Note: Your Active Directory administrator will create this as part of performing the registration. It is a Globally Unique Identifier (GUID), so any GUID generator can be used to create it.

Setting	Description
Client Secret	OAuth 2.0 client secret that is created as part of registering the Poly Cloud Services as an ADFS OAuth 2.0 client. Your Active Directory administrator will provide this to you. Note: Make sure you save the Client Secret in a secure location. Once you entered the Client Secret, you can't retrieve it from Poly Cloud Services portal.
Callback URL	This is a read-only field. Supply the Callback URL to your Active Directory administrator as it is required for registering the Poly Cloud Services as an ADFS OAuth 2.0 client.
Authorization URL	Your Active Directory administrator will provide this to you. It is typically in the form of <code>https://<company-adfs-domain>/adfs/oauth2/authorize</code> .
Token URL	Your Active Directory administrator will provide this to you. It is typically in the form of <code>https://<company-adfs-domain>/adfs/oauth2/token</code> .
Logout Redirect URL	Your Active Directory administrator will provide this to you. It is typically in the form of <code>https://<company-adfs-domain>/adfs/ls/?wa=wsignout1.0</code> .
Resource	Your Active Directory administrator will provide this to you. It is registered as the "Identifier" parameter of the Relying Party Trust in ADFS, for example, <code>https://<myapplication></code> .

5. Click **Save**.

Add Okta as a Custom Authentication Provider

The Okta provider allows you to configure your own custom federation between the Poly Cloud Services and your company's Okta-based user authentication service, tailoring the scope and duration of the federation to meet your needs.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Authentication Providers**.
2. In the **Custom Authentication Providers** section, click **okta** (Inactive).
3. Your Okta administrator should register the service using the **Redirect URL** (see table below).
4. Configure the required fields for the authentication provider.

Okta


Setting	Description
Name	Authentication provider name. This name appears on the sign in page, so choose a name that your users can recognize.
Okta Domain	Your organization's Okta Domain. Your Okta administrator will provide this to you. It is typically in the form of <code>https://<subdomain>.okta.com</code> or as <code><subdomain>.okta.com</code> .
Client ID	OAuth 2.0 client ID that is created as part of registering the Poly Cloud Services as an Okta OAuth 2.0 client. Your Okta administrator will provide this to you.

Setting	Description
Client Secret	OAuth 2.0 client secret that is created as part of registering the Poly Cloud Services as an Okta OAuth 2.0 client. Your Okta administrator will provide this to you.
Callback URL	This is a read-only field. Supply the Callback URL to your Okta administrator as it is required for registering the Poly Cloud Services to your company's Okta service.

Add OneLogin as a Custom Authentication Provider

The OneLogin provider allows you to configure your own custom federation between the Poly Cloud Services and your company's OneLogin-based user authentication service, tailoring the scope and duration of the federation to suit your needs.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Authentication Providers**.
2. In the **Custom Authentication Providers** section, click **onelogin**  (Inactive).
3. Your OneLogin administrator should register the service using the **Callback URL** (see table below).
4. Configure the required fields for the authentication provider.



OneLogin



Setting	Description
Name	Authentication provider name. This name appears on the sign in page, so choose a name that your users can recognize.
OneLogin Region	The region where your OneLogin instance is located. Select <code>us</code> for the United States or <code>eu</code> for the European Union.
Client ID	OAuth 2.0 client ID that is created as part of registering the Poly Cloud Services as a OneLogin OAuth 2.0 client. Your OneLogin administrator will provide this to you.
Client Secret	OAuth 2.0 client secret that is created as part of registering the Poly Cloud Services as a OneLogin OAuth 2.0 client. Your OneLogin administrator will provide this to you.
Callback URL	This is a read-only field. Supply the Callback URL to your OneLogin administrator as it is required for registering the Poly Cloud Services to your company's OneLogin service.

Edit or Delete a Custom Authentication Provider


You can edit or delete a custom authentication provider in **Authentication Providers**.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Authentication Providers**.
2. In the **Custom Authentication Providers** section, click one of the following active authentication providers:
 - **Office 365** 
 - **ADFS** 

-  **okta**
 -  **onelogin**
3. In the authentication provider configuration section, configure the required fields for the authentication provider, and do one of the following:
 - Click **Save** to save the changes, then click **>** to close the configuration tab.
 - Click **Cancel** to cancel the changes.
 4. To delete an authentication provider, click **Delete**.

License Management

You must have the **License Admin** role assigned to your user account to access the **Licenses**  functions.

You can see the number of total licenses, active licenses, licenses that are about to expire, impending licenses, and inactive licenses. The system lists each license with the following information:

License Information	Description
License ID	License Activation Key.
Feature Code	<p>Licensed feature.</p> <ul style="list-style-type: none"> ▪ PDMS-AUDIO—The license enables the account administrators to manage audio devices in the PDMS-E portal. <p>Each administrator needs proper permissions to access licensed services.</p>
Description	License description about the license, for example, the licensed Polycom product name.
Type	<p>License type.</p> <p>Managed Device—This type of license limits the total number of devices that can use the licensed feature.</p> <ul style="list-style-type: none"> ▪ If the feature code is PDMS-AUDIO, the license enables the account administrators to manage a limited number of audio devices in PDMS-E.
Transaction Type	<p>License transaction type.</p> <ul style="list-style-type: none"> ▪ Trial—A trial license is provided free of charge for some limited period of time. ▪ New—A new license is issued for new service subscriptions, typically with a one or three year period. ▪ Addon—An add-on license is issued to increase the capacity of a Managed Device during the term of an existing New or Renewal license. ▪ Renewal—A renewal license is issued for all subsequent renewals of service subscriptions, rolling together any Addon licenses into a single Renewal license for the new term.
Start Time	License issue time.
End Time	License expiration time.

License Information	Description
Used/Total	<p>The number of devices currently being used with the Managed Device service.</p> <ul style="list-style-type: none"> If the feature code is PDMS-AUDIO, it shows the number of audio devices that the Polycom Device Management Service manages versus the number it can manage.
Status	<p>License status.</p> <ul style="list-style-type: none"> Active—License is Active. Expiring Shortly—License has less than 31 days until it expires. Please renew your contract. Impending—License start date has not yet been reached. Note: This may happen when a customer renews and activates their license before the previous license has expired. Inactive—License has expired, and is now inactive.

Related Links

[Add Polycom Cloud Relay](#) on page 10

Activate a New License

You can activate your Polycom product licenses in **Licenses**.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Licenses**.
2. Click **Activate New License**.
3. Enter the `License Activation Key` and click **Continue**.

Tip: You can find the License Activation Key in your Polycom user license document. This key is a 17-character string found at the top of your license document.

Multiple products and product licenses may be bundled with the same license activation key.

4. Select the **I accept the terms in the License Agreement** check box and click **Activate License**.

Renew a License

You can renew your Polycom product licenses in the **Licenses** tab.

Procedure

1. In the Polycom Cloud Services portal, go to **Administration > Licenses**.
2. Select a license to renew.

Tip: Only licenses that are in the **Expiring Shortly** status can be renewed. These licenses are red to indicate this status.

3. Contact your channel or sales representative to inform them that your license requires renewal.

Tip: In general, your channel or sales representative will be notified before the license expires and should contact you as needed to renew the license.

4. When the license is renewed, it will no longer display in red and the **Status** will be **Active**.

Domain Management

You must have **Enterprise Admin** role assigned to your account to manage domains in your Poly Cloud Services account.

You can associate additional domains with your Poly Cloud Services account in addition to the initial domain associated with it (called the **Primary** domain).

These domains should be owned by your organization, and if you are using an external authentication provider, they should be domains that are all federated in that provider (so that it can authenticate users from all of the domains).

-
- Note:**
- A domain can be associated with only one Poly Cloud Services account. If another customer has already associated a particular domain with their account, you will receive an error if you subsequently try to add it to yours.
 - You or someone in your organization must have access to an active email account in the domain to be added—this is used to verify that the organization adding the domain has ownership of it.
-

You can manually add a domain or import domains.

Note: You can only import domains when Poly Cloud Services uses Microsoft Office 365 authentication provider.

Add a Domain

You can add multiple domains in addition to the **Primary** one.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Domain Management**.
2. Click **Add**.
3. Enter an email address of a user within the domain to be added in the **Email Address** field and click **Save**.

The service sends a verification email to the user whose email address you entered, and the domain is shown as **Pending Verification**.

4. The user in the new domain must click the verification link in the email to complete the addition of the domain.
5. Confirm that the **Status** of the new domain is **Verified**.

If the **Status** is **Pending Verification**, contact the user of the email address to complete the verification. If the user didn't receive the email, click **Resend Email** to resend the verification email.

Import Domains

If you have enabled one of the Office 365 Authentication Providers in your Poly Cloud Services account, you can import domains from that provider.

You must have access to a user account in your company's Microsoft Office 365 subscription to import domains (Microsoft Office 365 administrator role is not required).

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Domain Management**.
2. Click **Import from Office365** .

You're prompted to sign into the Microsoft Office portal within your company's Office 365 subscription, and are prompted for your consent to temporarily grant your Poly Cloud Services account the following permissions (required to retrieve the domain list):

- Sign you in and read your profile
 - Access your data anytime
3. Select the domain names you want to import into your company's Poly Cloud Services and click **Add**.

-
- Note:**
- The system lists all domains associated with your company's Office 365 subscription, but the ones already associated with other Poly Cloud Services accounts are unselectable.
 - If the system doesn't list your primary domain, you can't import other domains.
-


Delete Domains

You can remove domains that are no longer needed but are still associated with your Poly Cloud Services account.

Note: When you remove a domain, all users from this domain are removed from your Poly Cloud Services account.

Your or other administrators can add the removed domains and users back to your Poly Cloud Services account if desired.

Procedure

1. In the Poly Cloud Services portal, go to **Administration > Domain Management**.
2. Select the domains you want to delete and click **Delete** .

Note: You can't delete your **Primary** domain.

User Account Settings

Topics:

- [Change Your Password](#)
- [Update Your Profile](#)

You can manage aspects of your Poly Cloud Services account via the account menu (the pull-down menu labeled with your name in the upper right corner of your screen).

Change Your Password

You can change your password from the account menu.

Procedure

1. In the Poly Cloud Services portal, click the account menu.
2. Select **Change Password**.
3. Enter your current password and new password.
4. Click **Update**.

Update Your Profile

You can update your profile from the account menu.

Procedure

1. In the Poly Cloud Services portal, click the account menu.
2. Select **My Profile** to view your email address, and user name.
3. Optional: Change your `First Name` and `Last Name` if needed.