



DEPLOYMENT GUIDE

| April 2019 | 3725-69577-001B

# Poly Trio Systems with Alexa for Business

## Getting Help

For more information about installing, configuring, and administering Poly/Polycom products or services, go to Polycom Support.

Plantronics, Inc. (Poly — formerly Plantronics and Polycom)  
345 Encinal Street  
Santa Cruz, California  
95060

© 2021 Plantronics, Inc. All rights reserved. Poly, the propeller design, and the Poly logo are trademarks of Plantronics, Inc. All other trademarks are the property of their respective owners.

# Contents

---

<b>Before You Begin.....</b>	<b>2</b>
Audience, Purpose, and Required Skills.....	2
Minimum Requirements.....	2
Getting Help.....	3
Related Documentation.....	3
The Polycom Community.....	3
Product Tested with Alexa for Business.....	3
Network Requirements.....	4
 <b>Configuration Requirements in AWS to Get the Most from Poly Trio with Alexa for Business.....</b>	 <b>5</b>
 <b>Alexa for Business Setup.....</b>	 <b>6</b>
Link Your Polycom Cloud Services with Amazon Alexa for Business Service.....	6
Create an IAM Role in Alexa for Business.....	6
Upload the IAM Role into Your Polycom Cloud Services Account.....	6
 <b>Configuring Poly Trio to Connect with Alexa for Business.....</b>	 <b>8</b>
Enabling Alexa for Business on Poly Trio.....	8
 <b>Add Poly Trio to Your Polycom Cloud Services Account.....</b>	 <b>10</b>
Add Poly Trio to Your Polycom Cloud Services Account.....	10
Assign an Existing Alexa for Business Room to Poly Trio in PDMS-E.....	14
Edit an Existing Alexa for Business Room in PDMS-E.....	14
Create an Alexa for Business Room in PDMS-E.....	15
 <b>Invoke Alexa for Business .....</b>	 <b>17</b>
 <b>Privacy Aspects of Using Alexa for Business with Poly Trio.....</b>	 <b>18</b>
 <b>Known Issues.....</b>	 <b>19</b>

# Before You Begin

---

## Topics:

- [Audience, Purpose, and Required Skills](#)
- [Minimum Requirements](#)
- [Getting Help](#)
- [Product Tested with Alexa for Business](#)
- [Network Requirements](#)

This partner deployment guide explains how to integrate Poly Trio into Alexa for Business environments.

## Audience, Purpose, and Required Skills

This guide is written for a technical audience.

The primary audience for this guide is administrators who configure, customize, manage, and troubleshoot voice and/or video endpoints.

- You need a mid-level IT administrative expertise for AWS console and account management mainly focused on Alexa for Business topics.
- If configuring calendars, you should have Microsoft Exchange / O 365 or G Suite IT administrative expertise.
- The administrator should also be familiar with video conferencing concepts.

## Minimum Requirements

The following table explains the minimum required applications and access level to deploy Poly Trio with Alexa for Business.

### Minimum Product Requirements to Deploy Poly Trio with Amazon Alexa for Business

Products/Applications	Requirements
Amazon Web Services / Alexa for Business	Full access rights to Amazon Alexa for Business (all functions in Alexa for Business service)
Polycom Cloud Services Portal	User access with Enterprise Admin and Device Admin roles to configure Alexa for Business and add devices via the PDMS-E portal
Poly Trio	Admin rights on Poly Trio and/or provisioning server

If you intend to integrate an enterprise calendar with your Alexa for Business service, then you'll also need the following for whichever calendar service you integrate:

Products/Applications	Requirements
Calendar Microsoft Office 365	One of the following: <ul style="list-style-type: none"> <li>▪ Service account with read/write permissions for room calendars</li> <li>▪ Global administrator user to link Office 365 to Alexa for Business</li> </ul>
Calendar Microsoft Exchange	Administrator account within your Microsoft Exchange Server  Exchange Web Services (EWS) endpoint with a valid certificate (CA)  Basic authentication enabled on Exchange Web Servers (EWS)
Calendar Google G Suite	G Suite super administrator account  Enabled API access in the Google Admin console

## Getting Help

For more information about installing, configuring, and administering Polycom products, refer to the [Polycom Documentation Library](#) or **Documents & Software** at [Polycom Support](#).

## Related Documentation

For additional documentation resources related to Polycom's cloud services, see <https://cloudsupport.polycom.com/Services/>.

## 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 an 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.

## Product Tested with Alexa for Business

In this first release, only the following Polycom endpoint has been tested with Alexa for Business.

### Products Tested with Alexa for Business

Product	Tested Versions
Poly Trio	5.9.0 Rev. AA and higher

For information about the Alexa for Business commands you can use for video conferencing applications, sign into the Amazon console and go to [Available Alexa commands in Meeting Rooms](#).

## Network Requirements

You require the below mentioned connectivity within your network in order for your Poly Trio to reach the Polycom Cloud Services and Alexa for Business services:

Polycom Cloud Services API URLs (all connections made to port 443):

- <https://api-global.plcm.cloud/globaldirectory>
- <https://api-global.plcm.cloud/api>
- <https://api-global-mtls.plcm.cloud/api>
- <https://api-orion.plcm.cloud/api>
- <https://api-mtls.plcm.cloud/api>
- <wss://iot.plcm.cloud/api>

Polycom Cloud Services Administrative Portal URLs (all connections made to port 443):

- <https://console.plcm.cloud>
- <https://www.pdms.plcm.cloud>

Alexa for Business API URLs (all connections made to port 443):

- <https://avs-alex-na.amazon.com>
- <https://a4b.us-east-1.amazonaws.com>

# Configuration Requirements in AWS to Get the Most from Poly Trio with Alexa for Business

---

Before you configure your Poly Trio to use Alexa for Business, it's important to review the Alexa for Business services that can be configured to maximize the integration of your Poly Trio with them. In particular, familiarize yourself with the following functions so that you can make the most of your Poly Trio/Alexa for Business experience.

For more information about Amazon Web Service and Alexa for Business, refer to the [Amazon Web Service Documentation](#) and [Alexa for Business Administrator Guide](#).

- **Setup an Alexa for Business Room profile**, refer to the [Managing Room Profiles](#) AWS documentation.
- **Setup an Alexa for Business Conference Provider**, refer to the [Manage Conferencing Providers](#) AWS documentation.
- **Setup an Alexa for Business to Your Calendar**, refer to the [Link Alexa for Business to Your Calendar System](#) AWS documentation.
- **Setup Alexa for Business Contacts**, refer to the [Managing Contacts](#) AWS documentation.
- **Setup Alexa for Business Address Books**, refer to the [Managing Address Books](#) AWS documentation.
- **Setup Alexa for Business Skills (Optional)**, refer to the [Managing Skills](#) AWS documentation.
- **Setup an Alexa for Business Skill Group (Optional)**, refer to the [Managing Skill Groups](#) AWS documentation.

# Alexa for Business Setup

---

## Topics:

- [Link Your Polycom Cloud Services with Amazon Alexa for Business Service](#)

You must configure your AWS Alexa for Business Service and Polycom Cloud Services to enable your Poly Trios to use the Alexa for Business feature.

## Link Your Polycom Cloud Services with Amazon Alexa for Business Service

Before you configure AWS, review the [Alexa for Business Administration Guide](#).

### Create an IAM Role in Alexa for Business

To register your Poly Trios to your Alexa for Business service, you must enable your Polycom Cloud Services to register and manage devices within your Alexa for Business service. You do this by creating an Identity and Access Management (IAM) role in your Alexa for Business service and installing it in your Polycom Cloud Services account.

**Note:** Perform this step once.

#### Procedure

1. Log in to the [AWS Management Console](#).
2. Select **Services > Alexa for Business**.
3. Select **AVS Permissions**.
4. Select **Poly** in the **AVS device maker** pull-down menu.
5. Click **Create IAM role**, then click **Download CSV** and save the IAM role file to a safe location.

The screenshot shows the 'Create IAM role' page in the AWS Management Console. It features a form with the following fields: 'AVS device maker' (a dropdown menu with 'Poly' selected), 'AVS device maker's AWS account ID\*' (a text box containing '055481296106'), and 'Amazon ID\*' (a text box containing 'A238TWW36W3S92'). Below these fields is a blue 'Create IAM role' button. At the bottom of the form, there is a light blue box containing a 'Role ARN' field (with a long alphanumeric string), an 'External ID' field (with a shorter alphanumeric string), and a 'Download CSV' button.

### Upload the IAM Role into Your Polycom Cloud Services Account

You must now upload the IAM role file you saved into your Polycom Cloud Services account to establish the link between the two accounts.

Before you configure Polycom Cloud Services, review the [Polycom Cloud Services Documentation](#).

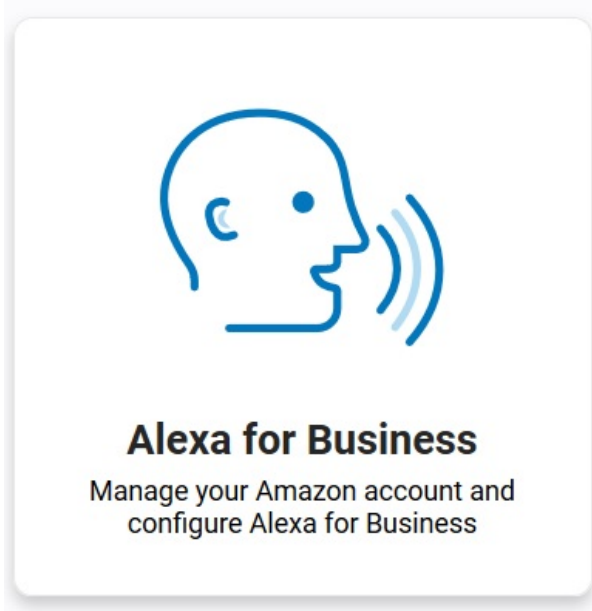
---

**Note:** Perform this step once.

---

## Procedure

1. Log in to the [Polycom Cloud Services Administration Portal](#).
2. Select **Alexa for Business**.



3. Set **Allow devices to enable Alexa for Business** to **Yes**.

4. Click **Upload Amazon CSV**.
5. Browse for and attach the CSV file `POLY-IAM-role.csv` that you previously downloaded.
6. 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, regenerate it on your Alexa for Business portal and reupload. If it continues to fail, contact your Polycom support representative.

7. Click **Save**.



# Configuring Poly Trio to Connect with Alexa for Business

---

## Topics:

- [Enabling Alexa for Business on Poly Trio](#)

This step enables your Poly Trio to connect to Polycom Cloud Services and Alexa for Business.

## Enabling Alexa for Business on Poly Trio

You're now ready to configure your Poly Trio to connect to Polycom Cloud Services and Alexa for Business. You'll do this by creating a configuration file that enables these services. You can then install the configuration file on your Poly Trio either via Web UI Configuration Utility or via a provisioning service. This guide describes the steps for using the Web UI Configuration Utility; consult your provisioning service documentation for assistance on using it to install the configuration file.

**Note:** Make sure that your Poly Trio clock is set to the current time/date before beginning this step as the connection to the Polycom Cloud Service requires this. Use of NTP is highly recommended for this. See the Poly Trio solution Administration Guide for details.

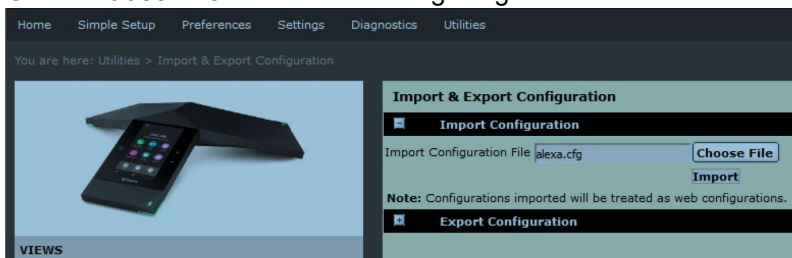
---

## Procedure

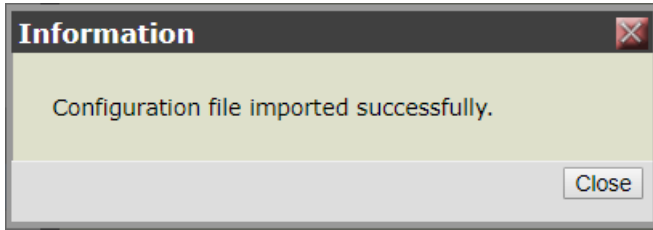
1. Copy the XML info below into a text file and save as a .cfg file (for example `alexa.cfg`).

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<UPLOAD>
<ALL
feature.alexaForBusiness.enabled="1"
feature.alexaForBusiness.handsFree.enabled="1"
feature.pcc.enabled="1"
/>
</UPLOAD>
```

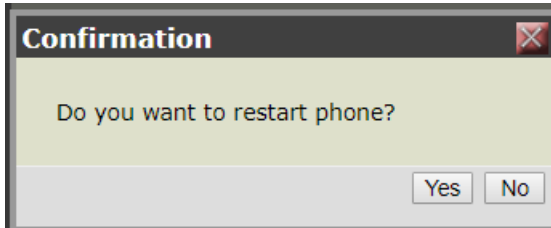
2. Log in to **Poly Trio Web Interface** as an **Admin**.
3. Select **Utilities > Import & Export Configuration**.
4. Click **Choose File** and select the .cfg file generated.



5. Click **Import** and select **Close** in the pop-up window.



6. Select **Utilities > Restart Phone** and select **Yes** in the pop-up window.



The Poly Trio system restarts.

# Add Poly Trio to Your Polycom Cloud Services Account

---

## Topics:

- [Add Poly Trio to Your Polycom Cloud Services Account](#)

Before you begin configuring Polycom Cloud Services, review the [Polycom Device Management Service Documentation](#).

## Add Poly Trio to Your Polycom Cloud Services Account

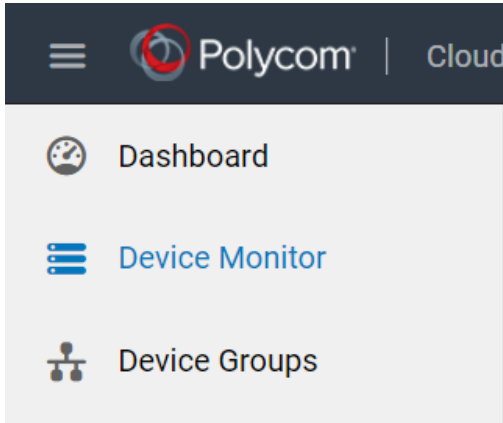
You can add your Poly Trio to your Polycom Cloud Services account by using the PDMS-E portal.

### Procedure

1. Log in to your Polycom Cloud Services account.
2. Select **PDMS-E**.

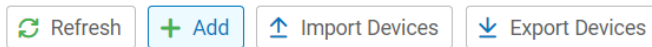


3. Click **Device Monitor**.



4. Click **+ Add**.

## Device Monitor

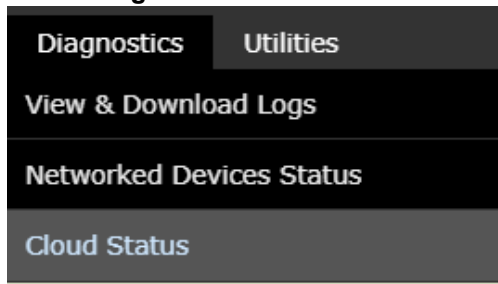


5. In the **Device Type** field, select **RealPresence Trio**.
6. Enable the **Cloud Service Registration** check box.
7. Obtain the cloud **Registration Code** from your **Poly Trio**.

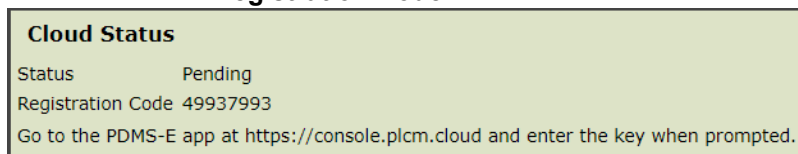
There are two methods to obtain the **Registration Code**:

### Method 1: Using Poly Trio Web UI

- a. Log in to **Poly Trio Web Interface** as an **Admin**.
- b. Select **Diagnostics > Cloud Services**.



- c. Make note of the **Registration Code**.



### Method 2: Using the Phone Menu

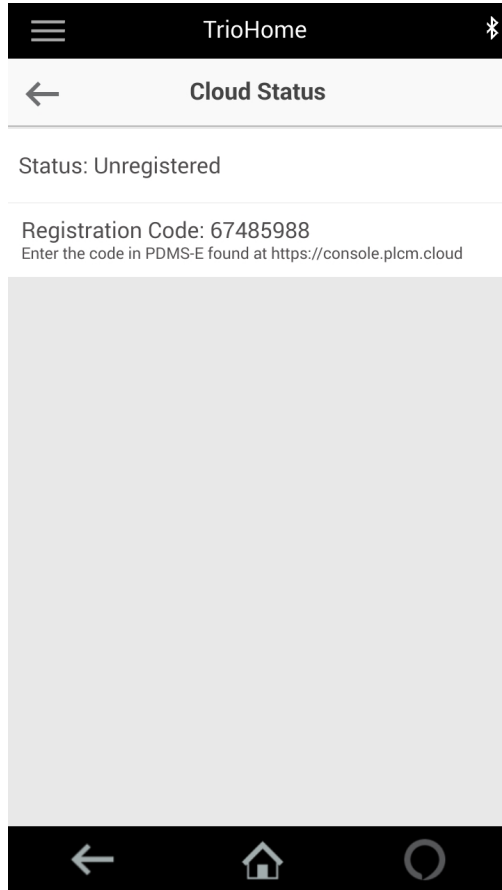
- a. Click **Settings > Status**.

Settings		
⚙️	Basic	>
⚙️	Advanced	>
📞	Features	>
ℹ️	Status	>

b. Under Status, select **Cloud Status**.

Status		
	Lines	>
	Diagnostics	>
	Licenses	>
	Location Information	>
	Networked Devices	>
	Calendar	>
	Regulatory Information	>
	Cloud Status	>

c. Make note of the **Registration Code**.



8. Enter the **Registration Code** from Poly Trio into the **Registration Code** field. Press **Enter** or the **Tab key** on your computer keyboard. The **Device Model**, **MAC Address** and the **Device Name** fields automatically update.
9. Optional: You can change the **Device Name** to whatever you want. (It defaults to the Poly Trio MAC Address).

---

**Note:** You can't use blank spaces for the device name. Use \_ or - instead.

---

10. Optional: Add a **Description**.
11. Optional: If you are not using Device Groups and Configuration Profiles, leave these fields blank; otherwise choose the appropriate associations.
12. Click **Save**.

**Device Monitor** > **Add Device**

Device Summary

* Device Type:	RealPresence Trio
Cloud Service Registration:	<input checked="" type="checkbox"/>
* Registration Code:	79530052
* Device Model:	RealPresence Trio 8800
* MAC Address:	
* Device Name:	Oliver-Trio-A4B
Description:	Oliver Home Office

13. Close the pop-up window that appears.

The newly added Poly Trio appears on the **Device Monitor** page with two status icons at the far right indicating Cloud Services and Alexa for Business connection status respectively. These icons become "green" when connected.

**Note:** The status icons may take a few minutes to reflect the true connection status. Click the **Refresh** button for an updated status.

**Device Monitor**

Refresh Add Delete Import Devices Export Devices

Status	Device Name	Model	Serial Number	MAC
	My-Polycom-Trio	RealPresence Trio 8800	0004f2fe3999	0004f2fe3999

## Assign an Existing Alexa for Business Room to Poly Trio in PDMS-E

Assigning a room enables access to advanced features like Joining a Meeting, Dial a Contact from Alexa for Business address book, and others.

### Procedure

1. Click the **Device Name** of the Poly Trio you wish to assign to a **Room**.
2. Select the **Alexa for Business** Tab.
3. Click the caret in the **Assigned Room** drop-down menu.
4. Wait a few seconds for the preconfigured rooms to appear.
5. Select the **Room** of your choice and click **Save**.

The screenshot shows the PDMS-E interface for a specific device, 'Oliver-Trio-A4B'. The 'Alexa for Business' tab is selected. Under the 'Assigned Room' section, a dropdown menu is open, displaying a list of available rooms. The room 'Oliver Home Office' is highlighted at the bottom of the list. The interface includes buttons for 'Save' and 'Return'.

You can also perform these steps on the **Amazon Web Service** console in the [Alexa for Business Service](#) section.

## Edit an Existing Alexa for Business Room in PDMS-E

Edit the settings of an existing room.

Make sure you're logged in to PDMS-E and the Device Monitor tab is open.

**Procedure**

1. Click the **Device Name** of the Poly Trio you want to edit.
2. Select the **Alexa for Business** Tab.
3. Wait until the configured Room appears.
4. Click **Edit a Room**.
5. In the following pop-up menu, you can change the **Room Name**, assign the Room to another existing **Room Profile** or change the **Room Calendar** (email address of the room for scheduling). Click **Ok** once finished.

Edit Room

\* Room Name:

\* Room Profile:  Access the AWS portal to create a Room Profile if none are available.

Room Calendar:

6. Click **Save**.

You can also perform these steps on the **Amazon Web Service** console in the [Alexa for Business Service](#) section.

**Create an Alexa for Business Room in PDMS-E**

Create a new room in PDMS-E.

Make sure you're logged in to PDMS-E and the Device Monitor tab is open.

**Procedure**

1. Click the **Device Name** of the Poly Trio you wish to assign to a **Room**.
2. Select the **Alexa for Business** Tab.
3. Click **Create a Room**.
4. In the following pop-up menu:
  - a. Enter the **Room Name**.
  - b. Select a **Room Profile** for the room.
  - c. If you have integrated a calendar service to your Alexa for Business account, configure the **Room Calendar** field with the email address of the room for scheduling.
  - d. If you have defined **Skill Groups** and want to assign one to your room, click the pull down menu under **Add Skill Groups**, select the one you want, and click **Add**.
  - e. Click **OK** once finished.



Create Room

\*Room Name:

\*Room Profile:

Access the AWS portal to create a Room Profile if none are available.

Room Calendar:

Add Skill Groups

No matching record data

5. Click **Save**.

You can also perform these steps on the **Amazon Web Service** console in the [Alexa for Business Service](#) section.

# Invoke Alexa for Business

---

Your Poly Trio is now ready for use with Alexa for Business.

- If you've enabled **Hands Free Mode**, you can simply say things like, **Alexa, call** XXX - YYY - ZZZZ. Many such features are available at Alexa for Business. You can refer to the Alexa for Business [website](#) for details.
- If you've not enabled **Hands Free Mode**, you must push the **Alexa** icon on the **Poly Trio LCD UI** before speaking your Alexa commands.

# Privacy Aspects of Using Alexa for Business with Poly Trio

---

You can use Alexa for Business with Poly Trio just like any other Alexa enabled devices.

If you have questions or concerns about privacy or security considerations, please see the **Privacy and data security** section of the [Alexa for Business FAQs](#).

# Known Issues

Known issues table lists known issues in Alexa for Business integration with Poly Trio.

## Known Issues

Category	Issue ID	Description	Workaround
Amazon Alexa for Business	EN-127637	Rarely, Alexa response have few audible dropouts.	No workaround
Amazon Alexa for Business	EN-127624	Some public Alexa skills might not play back properly.	No workaround
Amazon Alexa for Business	EN-122323	Poly Trio cloud registration key is rejected when entered to PCS.	Reboot the system, use the registration code that displays to add the system to PDMS using the registration code.
Amazon Alexa for Business	EN-122909	When Amazon Alexa is invoked for the first time on a Poly Trio system that has been reset to factory defaults, an immersive mode pop-up message displays.	No workaround
Amazon Alexa for Business	EN-121691	Pop-up messages fluctuates in and out of focus during an invocation of Amazon Alexa.	No workaround
Amazon Alexa for Business	EN-131163	When using Alexa to change Poly Trio volume levels, the actual volume level might not be identical.	No workaround
Amazon Alexa for Business	EN-131020	If Amazon Alexa is invoked within two minutes after the Poly Trio system is disconnected from the Internet, the system will display the "Listening" screen until a user taps the screen or the Internet connection is restored.	No workaround
Amazon Alexa for Business	EN-128110	When using Poly Trio daisy chaining, the Amazon Alexa icon does not display on the second daisy-chained Poly Trio system when mirroring is enabled, and the Push-to-Talk feature does not work.	No workaround
Amazon Alexa for Business	EN-127836	Some third-party skills that may not work as expected.	No workaround

---

**Note:** As per issue **EN- 124729**, sometimes the Alexa for Business "Room" status in **Amazon Web Services** is stale or out of date after changing the Alexa for Business settings in your PCS account. As a workaround, use the browser refresh button to reload the page.

---