OPERATIONS GUIDE

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Polycom® RealAccess™

Cloud Edition

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Polycom® RealAccess™, Cloud Edition Overview

The Polycom® RealAccess™, Cloud Edition service delivery platform is a secure portal for automating the management and monitoring of your collaboration solutions, which helps end users be more self-sufficient.

This Operations Guide is primarily for two user audiences:

- **Monitors and Maintainers** Users who watch or track conferencing data, such as usage trends, account thresholds, and meeting types (audio versus video).
- **Administrators** Users who configure the service platform, manage user accounts, and maintain the platform infrastructure.

What is Polycom RealAccess?

The RealAccess service delivery platform gives you actionable information for complex business processes associated with your collaboration solutions. Its flexibility lets you choose the services and applications that are appropriate for your environment and simplifies the process of adding services, making them available when and as needed.

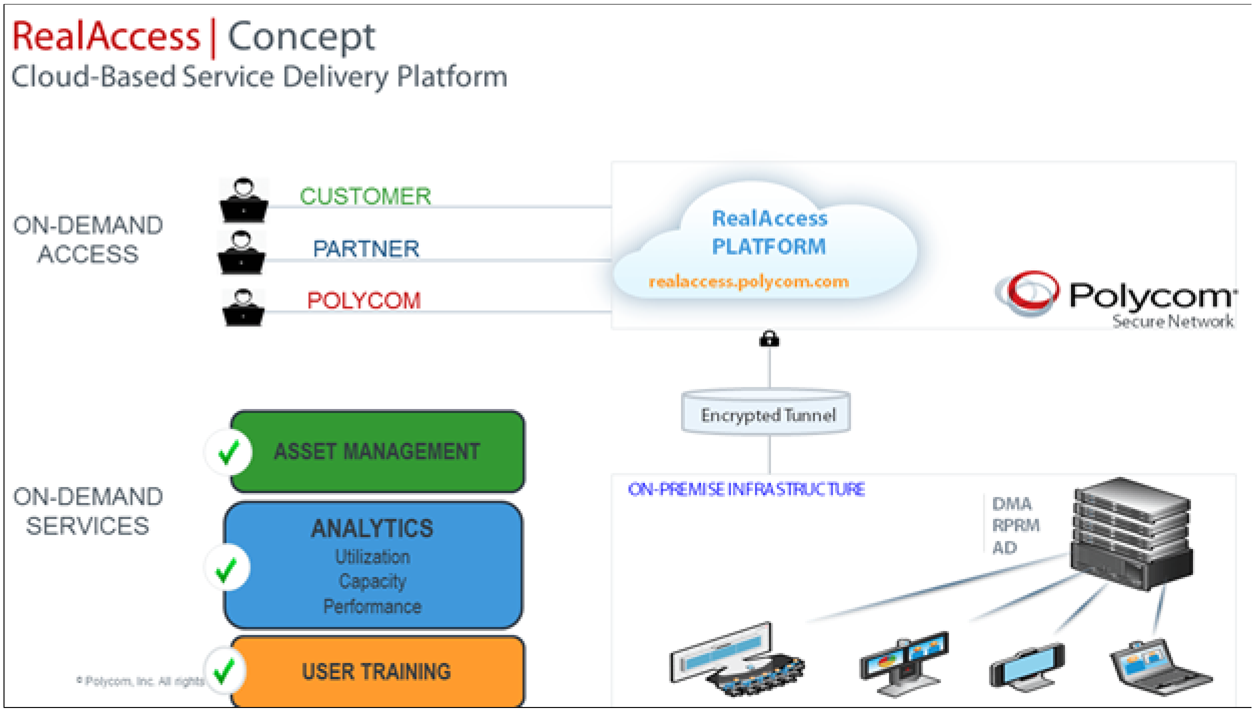
The RealAccess service delivery platform helps you reduce the workload of your IT organization, empower end users, track performance and quality of service, and provide evidence-based decision making for future expansions.

With the RealAccess service delivery platform, not only do customers and partners benefit, but Polycom is also able to improve its service offerings.

- Customers receive new insight into their video-conferencing analytics and investments for increased effectiveness in collaboration and decision making.
- Partners receive more clarity around customer needs while leveraging Polycom resources, helping create offers and services that increase revenue, profitability, and customer satisfaction.
- Polycom has a broad set of customer and partner data that optimizes the solutions and delivery process, leading to increased value and effectiveness of its services portfolio.

The following diagram shows the RealAccess, Cloud Edition service delivery platform architecture and overall functionality.

RealAccess, Cloud Edition service delivery platform overview



Asset Management and Comprehensive Analytics

The RealAccess service delivery platform includes dashboards with information about your endpoint inventory and utilization and performance metrics for your collaboration solutions.

- The **RealAccess Asset Management** service provides detailed insight into endpoints and infrastructure for any type of deployment. This service provides information on the types of endpoints that are in use, the software version each endpoint is running, and the location of each endpoint.
- The **RealAccess Analytics** service provides comprehensive data and metrics to help you improve user experience, understand endpoint and VMR utilization, monitor capacity and performance, and make evidence-based decisions for enhancing or expanding your collaboration deployment.

Secure Monitoring and Management

The RealAccess, Cloud Edition service delivery platform simplifies the process of monitoring your infrastructure platform, making information available when and as needed. Reports gathered from data collected from the Polycom® RealPresence® Platform are automatically uploaded to the cloud-based RealAccess portal using a highly secure data extraction agent installed on the customer's premises.

The following diagram shows the RealAccess, Cloud Edition service delivery platform security features.

RealAccess, Cloud Edition service delivery platform security features

Portal Dashboard Overview

The RealAccess service delivery platform employs a browser-based portal comprised of three main dashboards to monitor, administer, and troubleshoot your deployment. The three main dashboards (accessible from the portal's lower navigation bar) are:

- **Analytics** Endpoint inventory, meeting metrics, solution performance, capacity, and asset utilization and management
- **Administration** User authentication management, friendly names, notifications, and re-request CDR data in the event of an outage
- **Support** Status of components and connections and information on contacting Polycom Support

Analytics

The Home page of the RealAccess service delivery platform portal launches to the Analytics dashboard, which is also accessible through the **Analytics** link in the lower navigation bar. This dashboard displays information about your endpoint inventory, meeting metrics, solution performance, and asset utilization and management. The primary Analytics features are available by clicking the links on the top navigation bar and choosing the function from the drop-down menu.

Some pages on the portal include a **Home** tab. Clicking this directs you to the **Assets > Models** page.

Analytics Feature Descriptions

Feature	Description
Tutorial Library	Video tutorials for using Polycom and industry-standard endpoints: • Polycom® RealPresence® Group Series • Polycom® HDX® • Microsoft Lync 2010 • Microsoft Lync 2013 • Polycom® RealPresence® Desktop • Polycom® RealPresence® Mobile • Polycom® Touch Control The Tutorial Library requires a supported web browser with Internet access. The Tutorial Library can be disabled if Internet access is not available.
Assets	Inventory of endpoint types and locations: • **Site** Manage your network from a location perspective • **Models** Manage your network from an endpoint perspective • **List** View or export a detailed list of your entire network

Meetings	Provides meeting metrics and reports:
	• **Executive Summary** Enables your executive or non-IT staff to better analyze your video collaboration usage from a business level
	  ‣ Count of meetings (based on call type)
	  ‣ Hours of meetings
	  ‣ Calls over/under five minutes
	  ‣ Averages for number of participants, meeting duration, and type of meeting (audio or video)

Utilization	Usage details about your equipment and network: • **Summary** A quick look at how the system is being used: number of calls, their duration, number of meetings • **Trends** Identifies usage patterns and helps proactive device management • **Monthly** Equipment usage over the course of a year by month • **List View** Equipment usage over the course of the year by month in list format • **Endpoint Dashboard** Information about specific endpoint activity • **Conference Utilization** Information about conferences (for example, duration and number of participants)
Performance	Errors in your equipment or network • **Summary** System-wide error details and their origin • **Trends** Overall error patterns that help proactive device management • **Network** Highest number of calls impacted by packet loss, the most impacted sites, and an overall network score

Capacity	Systems utilization reports for your Polycom® RealPresence® Collaboration Server (RMX®) systems:
	• **RMX Utilization** Detailed hourly and daily MCU usage data
	  ◦ Percentage capacity
	  ◦ Raw ports available
	• **Concurrent Connections** Summarizes the number of concurrent connections by system type over a specified time period

Service	Fine tune reports for your endpoint assets:
	• **Entitlement** Advanced asset management
	  ◦ Upgrade or downgrade system type
	  ◦ Enable or disable endpoint performance measurement
	  ◦ Enable or disable an endpoint in the utilization count
	  ◦ Hide test systems so that their numbers don't impact your performance and usage metrics

Administration

The **Admin** link in the lower navigation bar enables users with administrative privileges to administer and configure portal and asset parameters. The primary Admin features are available by clicking **Setup** in the top navigation bar and choosing the function from the drop-down menu.

Administration Functions Descriptions

Function	Description
Agent	Technical information from your Polycom® RealPresence® DMA® and Polycom® RealPresence® Resource Manager systems used to create and download the RealAccess portal agent: • IP address • User name • Password
Asset Management	Merge endpoints together, especially when endpoints are imported before serial numbers were assigned in the RealPresence Resource Manager system
MCU Friendly Name	Assign a more recognizable name to your MCU
Notifications	Alert users to data lookup failures or excessive usage thresholds
Site Friendly Name	Assign a more recognizable name to your site
Users	Create, edit, and assign roles to users

Support

The **Support** link in the lower navigation bar enables you to troubleshoot your deployment and contact Polycom support. The primary Support features are available by clicking the links on the top navigation bar and choosing the function from the drop-down menu.

Support Functions Descriptions

Function	Description
Contact	Contact Polycom for support with your RealAccess service delivery platform: • Self-help support via the support forum • Technical support contact information
Status	Troubleshoot your RealAccess service delivery platform: • **Help** Read the RealAccess service delivery platform documentation • **Video** Watch video tutorials on troubleshooting your RealAccess service delivery platform • **Request RM Inventory** Re-request RealPresence Resource Manager inventory data • **Test All Connections** Test all the connections in your video conferencing solution

Working in the RealAccess Service Delivery Platform

This section includes general information you should know when working in the RealAccess service delivery platform.

Log In to the System

To log in to the RealAccess service delivery platform, you need the IP address or host name of the RealAccess service delivery platform and your user name and password.

To log in to the RealAccess service delivery platform:

1 Enter the portal URL into your web browser.
2 On the portal login page, enter your user name and password (if required).
3 Enable the **Remember me** check box if you do not want to log in each time (optional).
4 Click **LOG IN**.

Update Your User Profile

Editing your user profile enables you to update time zone and upload a user photo.

You cannot edit your name in the RealAccess service delivery platform portal user profile if you do not have the correct permissions. If you do not have administrator permissions to update user information, ask your system administrator to change your contact information if you need to make changes.

To update your personal profile:

1 In the top-right corner of the RealAccess service delivery platform portal, click your email address and click **User Profile**.
2 On the **Account | User Profile** page, edit the following information:
   - **Time Zone**

- **User Photo**

3 Confirm that your changes are correct and click **Save**.

View Tutorial Videos

The **Tutorial Library** page contains video tutorials for using the following Polycom and industry standard endpoints:

- RealPresence Group Series
- HDX
- Lync 2010
- Lync 2013
- RealPresence Desktop
- RealPresence Mobile
- Touch Control

To view tutorial videos:

1 Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Tutorial Library > <Endpoint Type>**.

2 One the landing page for the endpoint type you selected, click on a video to play it in your browser.

RealAccess Service Delivery Platform Analytics

Analytics provided by the RealAccess service delivery platform (located on the **Meetings**, **Utilization**, **Performance**, and **Capacity** tabs) help you understand how your collaboration solutions are used and how they are performing.

You must wait 24 hours after deploying RealAccess before the Analytics functionality is available.

View Meeting Activity

The **Meetings** tab provides meeting metrics and reports for your executive or non-IT staff to better analyze your video collaboration usage from a business level. Instead of only counting calls and numbers of ports used by your organization, the **Executive Summary** page summarizes meeting activity across the whole organization, including the following data:

- Count of meetings (based on call type)
- Hours of meetings
- Averages for number of participants, meeting duration, and type of meeting or call type (audio or video)
- Call success rates

In addition, the **List View** section below the graphs provides specific details about each call, for example, type, VMR number, meeting info, duration, user ID, number of participants, and more.

To view meeting activity for your organization:

1. Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Meetings > Executive Summary**.
2. Choose the following options, depending on the level of information you want to view:
   a. To view meetings that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.
   b. To change the default filter for **Calls over 5 minutes,** click the appropriate option in the drop-down list in the **Filters** section.The other filter options are **All Calls** and **Calls under 5 minutes**.

   The counts related to the meetings change based on your selections.
3. To change the **Call Type** and **Collaboration Activity** graphs to show the duration of meetings instead of the number of meetings, click **Hours of Meetings** in the drop-down list in the **Filters** section.

   The **Call Type** and **Collaboration Activity** graphs change to reflect duration of meetings.

4 In the **List View** at the bottom of the page, review data for individual meetings included in the selected time frame.

5 On the **List View**, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:

  - **Call Type**
  - **VMR**
  - **Meeting**
  - **Duration**
  - **User ID**
  - **Participants**
  - **Origin Endpoint Raw**
  - **Origin Model**
  - **Destination Endpoint Raw**
  - **Destination Model**

6 Click the column headers to sort the list using your selected options.

7 Click **Export** to download a formatted spreadsheet report to your system.

Monitoring Call and VMR Activity

The **Utilization** tab provides various metrics on call volumes and call duration across your network. You can monitor activity across your whole organization or look for more detailed information for selected locations, endpoint types and models, and VMRs.

View Summary Call Activity

The **Utilization | Summary** page provides an overview of your network's usage with comprehensive call data. You can review the following information:

- See the total, duration, and maximum number of calls.
- Compare different aspects of your network (locations, endpoint system types, and more) with the Highlights and Trends menus.
  - You can see how often collaboration rooms are used in your network with the **Highlights | Top 10** menus.
  - The Trends | [Analysis Period] graphs show information about **Calls**, **Duration**, **Room Utilization**, and **Meetings in VMR**.
- You can filter the information over a specific time period and by call volume (count or duration) or call length: short (less than five minutes), long (more than five minutes), or both.
- Print a PDF of your summary reports.

To view call activity for your organization:

1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Summary**.

2 Choose the following options, depending on the level of information you want to view:

   a To view calls that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.

   b To change the default filter for **Calls over 5 minutes,** click the appropriate option in the drop-down list in the **Filters** section.The other filter options are **All Calls** and **Calls under 5 minutes**.

   The counts related to the meetings change based on your selections.

3 To change the graphs to show the duration of meetings instead of the number of meetings, click **Duration (HH:MM)** in the drop-down list in the **Filters** section.

   The graphs change to reflect duration of meetings.

4 Check the **Trends | Last 30 Days** graphs at the bottom of the page to see a comparison of call traffic and meetings occurring in each of the last 30 days.

View Fluctuations in Daily Call Activity

The **Utilization | Trends** page provides detailed information about how your organization's call volumes change day-to-day in the time period you specify.

To view fluctuations in call activity for your organization:

1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Trends**.

2 Choose the following options, depending on the level of information you want to view:

   a To view calls that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.

   b .To change the default **Select All** for the following filters, click the appropriate option in the drop-down list.

   - ♦ **Call Type**
   - ♦ **System Type**
   - ♦ **Model**

   The graphs change to reflect the filter selections you made.

3 In the **List View** at the bottom of the page, review data for individual calls included in the selected time frame and filters.

4 On the **List View**, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:

   - ➢ **Call Type**
   - ➢ **Start**
   - ➢ **Duration (sec)**
   - ➢ **Source**
   - ➢ **Origin System Type**
   - ➢ **Destination**

5 Click the column headers to sort the list using your selected options.

6 Click **Export** to download a formatted spreadsheet report to your system.

To find similar information about calls that were unsuccessful or were disconnected, use the tools on the **Performance** tab.

View Monthly Call Duration

The **Monthly Duration** page displays two graphs showing a month-by-month total duration of calls, one graph subtotaling data by system type, and the other subtotaling by call type.

To view total call duration by month, system type, and call type:

1. Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Monthly**.
2. For each graph on the page, choose the following filter options, depending on the level of information you want to view:
   a. To view the total duration of calls at a particular location instead of the default **All Sites,** click the desired location from the drop-down list.
   b. To view monthly call durations for a previous year instead of the default current year, click the desired year from the drop-down list.
3. Click **Export** to download a formatted spreadsheet report to your system.

View Call Activity Totals for Individual Endpoints

The **List View** page lists, over a specific time period, the number of calls and call duration for devices registered to your RealPresence Resource Manager. With no filters for the **System Type** option, the list shows all registered devices. You can filter the list to show specific types of devices:

The Percent column of the page shows the percentage of time an endpoint was in use out of the total time available. The total time available is assumed to be 40 hours, based on a five-day, eight-hours-per-day, work week.

To view activity on your endpoint devices:

1. Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Utilization > List View.**
2. Choose the following options, depending on the level of information you want to view:
   a. To view calls that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.

      A list of the endpoints with activity for that time frame appears.
   b. To view endpoints of a specific type, click the desired endpoints in the **System Type** drop-down list. The default is **Select All** to show all endpoint types.
3. Click the column headers in the list to sort the list using your selected options.
4. Click **Export** to download a formatted spreadsheet report to your system.

View Daily or Hourly Activity of a Location's Individual Endpoints

The **Endpoint Dashboard** displays daily or hourly call activity for the specific model type at a specific location in your system. Also included are the following types of information:

- Success and failure rates
- A list of error types and the number of errors that occurred.
- Monthly average length of calls for the last year, for all endpoints included in the report.
- Details about each call that users made with each endpoint included in the report.

Microsoft Lync and RealPresence Web Suite endpoints are **not** included in this report.

To view the daily or hourly activity for an endpoint model at a specific location:

1. Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Endpoint Dashboard**.
2. From the **Type** drop-down list, select the system type for the endpoints you want to view.
3. From the **Site** drop-down list, select the location of the endpoints you want to view.
4. From the **Endpoints** drop-down list, select the endpoint you want to view.
5. Choose the following options, depending on the level of information you want to view:
   a. To view activity that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.
   b. To view activity for calls with a duration of greater or less than 5 minutes, click your selection in the **Filters** drop-down list. The default is **All Calls**.
6. In the **List View** at the bottom of the page, review information for individual calls included in the selected time frame and filters.
7. On the **List View**, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Call Type**
   - **Start**
   - **Duration (sec)**
   - **Source**
   - **Origin System Type**
   - **Destination**
8. Click the column headers in the list to sort the list using your selected options.
9. Click **Export** to download a formatted spreadsheet report to your system.

View VMR Usage

The **Conference Utilization | Trends** page displays information on usage of Virtual Meeting Rooms (VMRs). Information can include any of the following on an hourly or daily basis, depending on the time frame you select:

- The number of VMR conferences that occurred.
- The total of VMR usage in minutes.
- The total number of participants in the conferences that occurred.

To view the usage of VMRs:

1. Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Conference Utilization**.
2. Choose the following options, depending on the level of information you want to view:
   a. To view usage that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.
   b. In the **Select** drop-down list, select one of the following types of information you want the graph to display:
      - **Number of VMRs**
      - **Minutes in VMRs**
      - **Participants in VMRs**
   c. To filter information for specific conference type, click any of the following from the **Conference Type** drop-down list:
      - **VMR**
      - **Scheduled**
      - **RealConnect**
      - **LYNC_CAA**

      The default is **Select All**.

      Your selection of conference type also filters the conferences listed in the **List View** at the bottom of the page.
3. In the **List View** at the bottom of the page, review data for individual conferences included in the selected time frame and filters.
4. On the **List View**, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Start Time**
   - **Conference Type**
   - **User ID**
   - **Room ID**
   - **Call Duration (mins)**
   - **Participant Count**
   - **Maximum Resources**
   - **MCU Names**

- **User Data**
- **Conference Display Names**

5 Click the column headers to sort the list using your selected options.

6 Click **Export** to download a formatted spreadsheet report to your system.

Connection Error Metrics

The **Performance** tab provides data to help you identify and understand errors in your network.

View Summary of Errors by Category

The **Performance Summary** page provides an overview of connection errors in your network. A list of the most frequent types of errors appears in the **Disconnection Cause** section. Each error type is linked to an Error Dashboard, which provides more detail about that specific error type. The page also displays a variety of lists of error counts, subtotaled according to different categories, to help you recognize how and where errors happen. The lists include:

- **Sites with Errors**
- **Rooms with Errors**
- **Users with Errors**
- **Personal Systems with Errors**

At the bottom of the page, the **Performance Summary** page also tallies the success rate of connections, by site and connection type.

To view a summary of errors by category:

1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Performance > Summary**.

2 Choose the following options, depending on the level of information you want to view:

   a To view error counts that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.

   b To sort error counts based on whether the destination or the source had the error, change the selection in the **Filter** drop-down list.

3 Click **Print** to print a PDF of the Performance Summary report.

View Details about a Specific Error Type

The **Error Dashboard** page displays counts, over a defined time frame, of a specific error type you select from the **Performance Summary** page. The page also displays a variety of count lists for that error type, with subtotals for specific categories to help you recognize how and where the error happens. The lists include:

- **Sites impacted**
- **System types impacted**
- **Users impacted**

- **Systems impacted**

If the errors occur on the DMA itself, the **Sites impacted**, **Users impacted**, and **Systems impacted** lists display the words **Call Server** for the DMA. This is because the DMA is not assigned a system type, user name, or site name. Additionally, the **System Type** list displays the DMA as **Unassigned**.

In addition, the **List View** section at the bottom of the page provides specific details about each incidence of the error, for example, the source, destination, and system type involved with each failed connection.

To view details about a specific error type:

1. From the **Disconnection Cause** list on the **Performance Summary** page, click an error type.
2. Choose the following options, depending on the level of information you want to view:
   a. To view errors that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.
   b. To change the default filter for errors based on **Source** or **Destination,** click the appropriate option in the **Filter** drop-down list.

   The counts related to the errors change based on your selections.
3. In the **List View** at the bottom of the page, review data for individual errors included in the selected time frame and filters.
4. On the **List View**, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Severity**
   - **Start**
   - **Source**
   - **Origin System Type**
   - **Destination**
   - **Destination Signal Type**
5. Click the column headers to sort the list using your selected options.
6. Click **Export** to download a formatted spreadsheet report to your system.

View the Times When Peaks in Errors Occur

The **Performance | Trends** page provides detailed information about how the number of errors changes day-to-day or hour-to-hour and shows when peaks in error counts occur.

To view fluctuations in the number of errors for your organization:

1. Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Performance > Trends**.
2. Choose the following options, depending on the level of information you want to view:
   a. To view errors that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.

b. To filter errors based on call type, select one or more options in the **Call Type** drop-down list.
c. To filter errors based on system type, select one or more options in the **System Type** drop-down list.
d. To filter errors based on models, select one or more options in the **Model** drop-down list.

The counts related to the errors change based on your selections.

3. In the **List View** at the bottom of the page, review data for individual errors included in the selected time frame and filters.
4. On the **List View**, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Severity**
   - **Start**
   - **Source**
   - **Origin System Type**
   - **Destination**
   - **Destination Signal Type**
5. Click the column headers to sort the list using your selected options.
6. Click **Export** to download a formatted spreadsheet report to your system.

View Sites and Systems with Network Issues

The **Network | Summary** page displays the number of calls impacted by packet loss within the selected time frame and identifies the sites, system types, and specific systems that had the issues.

To view fluctuations in the number of errors for your organization:

1. Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Performance > Network**.
2. Choose the following options, depending on the level of information you want to view:
   a. To view network issues that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.
   b. To filter the issues by specific sites, select one or more options in the **Site** drop-down list.
   c. To filter errors based on system type, select one or more options in the **System Type** drop-down list.
   d. To filter issues based on severity, select either **Warning** or **Critical** from the **Network Flags** drop-down list.

   The counts related to the issues change based on your selections.
3. In the **List View** at the bottom of the page, review data for individual errors included in the selected time frame and filters.
4. On the **List View**, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Name**
   - **Site**

- **% PL RX**
- **% PL TX**
- **% PL**
- **Start Date**
- **Remote System Name**

5 Click the column headers to sort the list using your selected options.

6 Click **Export** to download a formatted spreadsheet report to your system.

Capacity Usage Metrics

The **Capacity** tab provides data on the peak levels of usage of your system, overall and for the individual MCUs. Data is presented as percentages of total capacity, maximum connections, and port usage.

View RMX Usage of Capacity

The **RMX Capacity** page displays the maximum usage of your MCUs' capacities at any point in time, either as a percentage of total available capacity or the number of ports. View hourly and daily usage of all resources on your MCUs or see usage of video or audio only. This information can help you do the following tasks:

- Understand the limits of your network
- Discover and analyze usage trends
- Plan and justify when you need to update your capacity

To view RMX capacity usage:

1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Capacity > RMX Utilization**.

The page displays two graphs on capacity usage, one for daily usage and the other for hourly usage.

2 For either graph, choose the following options, depending on the level of information you want to view:

a To view capacity usage that occurred in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.

b To view capacity usage for video or audio ports only, change the selection in the **Resources** drop-down list. The default **Capacity** includes all resources.

c To view capacity usage based on the number of ports used, select **Ports** in the **Utilization** drop-down list. The default is **Percent**, which is the percent used of an MCU's total capacity available.

You can compare the totals in the graphs with the total ports available as listed in the **RMX Capacity | Summary** table at the bottom of the page.

3 To review the maximum number of ports available on your MCUs, look at the **RMX Capacity | Summary** table at the bottom of the page.

To export RMX capacity usage to an Excel spreadsheet:

1 On the **Capacity > RMX Utilization** page, scroll to the **RMX Capacity | Export** section at the bottom.
2 Click the desired time frame for the report in the **Period of Analysis** drop-down list.
3 Click **Export**.

View Peaks in Concurrent Connections

The **Concurrent Connections** page displays the maximum number of concurrent connections in your system in each hour or each day, depending on time period you specify. The **Concurrent Connections** page also displays a detailed list of how registered devices are being used over the selected time period. You can filter the information on the page for specific types of systems.

To view maximum concurrent connections in your system:

1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Capacity > Concurrent Connections**.
2 Choose the following options, depending on the level of information you want to view:
   a To view concurrent connections in a particular time frame, click the time frame in the **Period of Analysis** drop-down list.
   b To change the default filter for specific system types, click the appropriate options in the **Filter** drop-down list. The default is **Select All** to include all system type.

   The counts related to the meetings change based on your selections.
3 In the **List View** at the bottom of the page, review data for individual connections that occurred in the selected time frame and filters.
4 On the **List View**, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Severity**
   - **Start**
   - **Duration**
   - **Source**
   - **Origin System Type**
   - **Destination**
5 Click the column headers to sort the list using your selected options.
6 Click **Export** to download a formatted spreadsheet report to your system.

RealAccess Service Delivery Platform Asset Metrics and Management

The RealAccess service delivery platform provides reporting and asset management for your endpoint systems. The portal pages located in the **Assets** and **Services** tabs on the RealAccess service delivery platform portal enable you to view information about your network endpoints, and the **Asset Management** page in the **Admin** dashboard enables users with the correct permissions to fine tune your endpoint asset classifications to create more accurate reports.

Endpoint Asset Metrics

The **Assets** tab on the RealAccess service delivery platform portal provides metrics and enables you to export reports on your network endpoints.

View Endpoint Asset Inventory

The **List** page provides detailed information for all of the endpoint assets in your network on the **Inventory Grid** list.

To manage your asset inventory list:

1. Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Assets > List.**
2. On the **Inventory Grid** list, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Site**
   - **System Name**
   - **Type**
   - **Model**
   - **Owner**
   - **SN** (serial number)
   - **Last Call Date**
   - **Active**
3. Click the sort icon in the upper-right corner of each column to sort the list using your selected options.
4. Click **Export** to download a formatted spreadsheet report to your system.

Manage Endpoint Metrics by Location

The **Site** page provides endpoint information by location. You can view information the active and inactive endpoint systems in your network and see which software versions are most commonly used.

You can view your endpoints by choosing information to display in the **Assets | Site View** page.The dynamic lists on this page filter information from general to specific, and all of the relevant menus and corresponding data on this page change to reflect your selections. The lists provide information in the following hierarchy:

- Active or inactive
- Location
- Type
- Model
- Software version

The process for viewing active and inactive endpoints is the same with the exception of the list titles changing between **Active** and **Inactive**, depending on which option you select. In this procedure, the active list titles are used.

To view endpoint information by location:

1. Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Assets > Site**.
2. In the **Count of Active systems** list, click **Active** (default).

   The locations with active systems appear in the **Systems by site** list.
3. Choose the following options, depending on the level of information you want to view:

   a. To view endpoint types at a specific location, click the site name in the **Systems by site** list.

      The endpoint types at that location appear in the **Active in <Location> by type** list.

   b. To view endpoint models of a specific type, click the endpoint type in the **Active in <Location> by type** list.

      The endpoint models of that type appear in the **Active <Type> in <Location>** list.

   c. To view the software versions a specific endpoint model are running, click the endpoint model in the **Active <Type> in <Location>** list.

      The software versions running on those endpoint models appear in the **Software Release** list and the latest software version available for that endpoint model displays in the **Latest Polycom Software Release** field.

   d. Click the specific software version to view the endpoints running that software version.

   After you select the level of endpoint information to display, the endpoint list at the bottom of the page updates based on your selected level of information and parameters.
4. On the endpoint list, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:

   - **Site**
   - **System Name**
   - **Type**
   - **Model**

- **Owner**
- **Software**
- **SN** (serial number)
- **Last Call Date**

5 Click the column headers to sort the list using your selected options.

6 Click **Export** to download a formatted spreadsheet report to your system.

Manage Endpoint Metrics by Type

The **Models** page provides endpoint information by type. You can view information about the active and inactive endpoint systems in your network and see which software versions are most commonly used.

Endpoints must be registered to your RealPresence Resource Manager system and the Directory Service for endpoint serial numbers to display on the RealAccess service delivery platform.

You can view your endpoints by choosing information to display in the **Assets | Model View** lists.The dynamic lists on this page filter information from general to specific, and all of the relevant menus and corresponding data on this page change to reflect your selections. The lists provide information in the following hierarchy:

- Active or inactive
- Type
- Model
- Software version
- Location

The process for viewing active and inactive endpoints is the same with the exception of the list titles changing between **Active** and **Inactive**, depending on which option you select. In this procedure, the active list titles are used.

To view endpoint information by type:

1 Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Assets > Models**.

2 In the **Count of Active systems** list, click **Active** (default).

The endpoint types appear in the **Active systems by type** list.

3 Choose the following options, depending on the level of information you want to view:

a To view endpoint models of a specific type, click the endpoint type in the **Active systems by type** list.

The endpoint models of that type appear in the **Active <Type> systems** list.

b To view the software versions a specific endpoint model are running, click the endpoint model in the **Active <Type> systems** list.

The software versions running on those endpoint models appear in the **Software Release** list and the latest software version available for that endpoint model appears in the **Latest Polycom Software Release** field.

c To view the locations that are running a specific software version, click the software version in the **Software Release** list.

The locations running that specific software version appear in the **Site** list.

After you select the level of endpoint information to display, the endpoint list at the bottom of the page updates based on your selected level of information and parameters.

4 On the endpoint list, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:

- **Site**
- **System Name**
- **Type**
- **Model**
- **Owner**
- **Software**
- **SN** (serial number)

5 Click the column headers to sort the list using your selected options.

6 Click **Export** to download a formatted spreadsheet report to your system.

Endpoint Asset Management

The **Services** tab on the RealAccess service delivery platform portal provides advanced asset metrics and entitlement information for your endpoints. Users with administrator privileges can manage endpoint assets on the **Asset Management** administrative page.

View Asset Entitlement Information

The **Service | Entitlement** page shows the correlation and entitlement status of the hardware assets in your deployment.

The two list views at the bottom of the page provide the following information for active assets:

- Active assets missing from Siebel
- Active assets

To manage your asset entitlement lists:

1 Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Services > Entitlement**.

2 For each active assets list, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:

- **Active Assets missing from Siebel:**

- **SN** (serial number)
- **Site**
- **System Name**
- **Type**
- **Model**
- **Owner**
- **Date Last Call**
- **Entitlement**

➢ **Active Assets:**

- **SN** (serial number)
- **Site**
- **System Name**
- **Type**
- **Model**
- **Entitlement**
- **Partner**
- **Coverage**
- **End Date**
- **Days Before Expiration**

3 Click the column headers to sort the list using your selected options.

4 Click **Export** to download a formatted spreadsheet report to your system.

Assigning Endpoints to Departments

To manage endpoints that were imported before serial numbers were properly assigned in the RealPresence Resource Manager system, you can create departments on the **Assets | Admin List View** page and assign an endpoint to them. You can then merge a department's endpoints together.

Create a Department

You can create a department in the **Department Grid** section of the **Asset Management** page.

To create a Department:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.
2. Click **Create Department**.
3. Type the new department name in the **Department** field and click **Update**.

Assign an Endpoint to a Department

You can assign an Endpoint to a Department in the **Endpoint Grid** section by editing the endpoint asset information.

To assign an endpoint to a Department:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.

2 In the **Endpoint Grid** list, locate the endpoint you want to assign to a Department and click **Edit**.

The column with the **Edit** option may be hidden on your screen due to browser limitations. To edit an item in your list views, either slide the scroll bar at the bottom of the page all the way to the right to view the **Commands** column, or, optionally, click **Edit Columns** and clear the check boxes next to columns that you do not wish to view.

3 In the **Department** column, choose a department from the drop-down menu and click **Update**.

Merge Endpoints in a Department

Once you have assigned endpoints to a department, you can merge the department's endpoints.

To merge endpoints in a Department:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.

2 In the **Endpoint Grid** list, locate the endpoints assigned to a single department that you want to merge and enable the check box for each.

3 Click **Merge endpoints**.

Update System Information for Asset Reporting

You can update the system information for your endpoint assets to give better accuracy in your asset metrics and reports. You can upgrade or downgrade your system type, enable or disable endpoint performance measurement, enable or disable an endpoint in the utilization count, or hide test systems so that their numbers don't impact your performance and usage metrics.

To update system information to manage asset reporting:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.

2 In the **Endpoint Grid** list, locate the endpoint you want to update and click **Edit**.

The column with the **Edit** option may be hidden on your screen due to browser limitations. To edit an item in your list views, either slide the scroll bar at the bottom of the page all the way to the right to view the **Commands** column, or, optionally, click **Edit Columns** and clear the check boxes next to columns that you do not wish to view.

3 Choose the endpoint options for the metrics you want to update:

- To upgrade or downgrade the endpoint's **System Type**, select an option from the drop-down menu in the **L2 System Type** column.
- To include the endpoint in performance measurements, enable the check box in the **Count in Performance** column. Disable the check box to remove the endpoint from performance metrics.
- To include the endpoint in the utilization count, enable the check box in the **Count in Utilization** column. Disable the check box to remove the endpoint from utilization metrics.
- To show the endpoint in entitlement information, enable the check box in the **Count in Entitlement** column. Disable the check box to remove the endpoint from entitlement metrics.

4 Click **Update**.

RealAccess Service Delivery Platform Administration

The RealAccess service delivery platform **Admin** dashboard provides management tools for portal administrators with the following permissions:

- Admin
- Customer Admin

Access the **Admin** page by clicking on the **Admin** link in the lower navigation bar.

The column with the **Edit** option may be hidden on your screen due to browser limitations. To edit an item in your list views, either slide the scroll bar at the bottom of the page all the way to the right to view the **Commands** column, or, optionally, click **Edit Columns** and clear the check boxes next to columns that you do not wish to view.

Managing User Accounts

The **Users** page allows an administrator to create, edit, and assign roles to users in the system. In an Single Sign-on (SSO) system, this menu cannot be used to create users, but it can be used to assign roles to them.

You can assign the following roles to users in your RealAccess service delivery platform.

RealAccess User Roles

Role	Available Functions/Menus	Notes
Admin	Analytics, Admin, Support, Assets, Meetings, Utilization, Performance, Capacity	Access to administrative functions and analytics
Customer Admin	Analytics, Admin, Support, Assets, Meetings, Utilization, Performance, Capacity	Should be combined with Customer Operator role for full functionality
Customer Operator	Analytics, Support, Assets, Utilization, Performance, Capacity	Should be combined with Customer Admin role for full functionality
Videos	Analytics, Support, Videos	Can view videos only

Add a User Account

You can add a user account to your RealAccess service delivery platform.

To add a user account:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Users**.

2 In the **Setup | Users Setup** page, click **Create New User**.

3 Add the information required for the following fields:

- **First Name**
- **Last Name**
- **Email**
- **Role(s)**
- **Time Zone ID**

4 Click **Update**.

Edit a User Account

You can edit a user account to update user information.

To edit a user account:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Users**.

2 In the **Setup | Users Setup** page, choose a user and click **Edit**.

3 Update the information required for the following fields:

- **First Name**
- **Last Name**
- **Email**
- **Role(s)**
- **Time Zone ID**

4 Click **Update**.

Reset a Password

You can send a password reset request if a user needs to reset a password.

To reset a password:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Users**.

2 In the **Setup | Users Setup** page, choose a user and click **Reset Password**.

A message indicates that a reset password email has been sent to the user.

Delete a User Account

You can delete a user account from your RealAccess service delivery platform.

To delete a user account:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Users**.
2 In the **Setup | Users Setup** page, choose a user and click **Delete.**

Managing Infrastructure Products

Your initial RealPresence DMA and RealPresence Resource Manager systems are configured as part of your system deployment, but you can update the product information or add new systems on the **Agent** page.

Add an Infrastructure Product

You can add a new RealPresence DMA or RealPresence Resource Manager system to your RealAccess service delivery platform after your initial deployment.

To add an infrastructure product:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Agent**.
2 In the **Setup | Agent** page, choose one of the following products to add:
  - To add a new RealPresence DMA system, click **Add a new DMA**.
  - To add a new RealPresence Resource Manager system, click **Add a new RPRM**.
3 Add the information required for the following fields:
  - **IP Address**
  - **Username**
  - **Password**
4 Click **Update**.

Edit an Infrastructure Product

You can edit your RealPresence DMA or RealPresence Resource Manager system to your RealAccess service delivery platform after your initial deployment.

To edit an infrastructure product:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Agent**.
2 In the **Setup | Agent** widget, choose a product and click **Edit**.
3 Update the information in the following fields:
  - **IP Address**
  - **Username**
  - **Password**
4 Click **Update**.

Delete an Infrastructure Product

You can delete a RealPresence DMA or RealPresence Resource Manager system from your RealAccess service delivery platform.

To delete an infrastructure product:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Agent**.

2 In the **Setup | Agent** widget, choose a product and click **Delete**.

Configuring Component Aliases

You can configure “friendly names” or aliases for certain components and functions in the RealAccess service delivery platform.

Configure an MCU Alias

The **MCU Friendly Name** page enables you to rename your MCU(s) to a more recognizable name.

To configure an MCU alias:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > MCU Friendly Name**.

2 In the **Setup | MCU Friendly Name** page, choose a product and click **Edit**.

3 Update the information in the following fields:

   - **Friendly Name**
   - **MCU Type**

4 Click **Update**.

Remove an MCU from Analytics

In order to maintain integrity of historical data, RealAccess continues to retain and display old MCU names in reports even after one of the following actions:

- An MCU is replaced and keeps the same name
- An MCU is replaced and gets a different name
- An MCU is not replaced but is given a different name

Depending on the action taken from the preceding list, reports can therefore show what appear to be duplicate MCUs or show an MCU that is no longer in service. As a result, the **MCU Friendly Name** page enables you to streamline your reports by hiding an old duplicate MCU name or hiding an MCU’s name that is no longer in service.

To hide an MCU duplicate name or MCU that is no longer in service:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > MCU Friendly Name**.

2 In the **Setup | MCU Friendly Name** page, find the old or removed MCU name, and click **Edit**.
3 In the **Hide by default** column, click the checkbox.
4 Click **Update**.

Configure a Site Alias

The **Site Friendly Name** page enables you to rename your site locations to a more recognizable name.

To configure a site alias:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Site Friendly Name**.
2. In the **Setup | Site Friendly Name** page, choose a location and click **Edit.**
3. Update the information in the following fields:
   - **Friendly Name**
   - **City Name**
   - **Country Name**
   - **Longitude**
   - **Latitude**
4. Click **Update**.

Managing Notifications

The **Notifications** page contains options to configure notifications and alerts for connection changes to the RealAccess service delivery platform, MCU capacity threshold alerts, and specified error values.

Configure a Connection Notification

Configure the notification options to receive an email when your connection to the RealAccess service delivery platform changes.

To configure a connection notification:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Notifications**.
2. In the **Setup | Connections to RealAccess** section, click **Add Notification**.
3. Add the email address for the connection notification delivery in the **Email** field.
4. Click **Update**.

Configure an MCU Capacity Notification

Configure the notification options to receive an email when the MCU capacity exceeds a threshold you specify.

To configure an MCU capacity notification:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Notifications**.
2. In the **Setup | MCU Capacity** section, click **Add Notification**.
3. Update the information in the following fields:
   - Add the email address for the connection notification delivery in the **Email** field.
   - Use the up and down arrows to adjust the **Audio Percent** threshold.
   - Use the up and down arrows to adjust the **Video Percent** threshold.
   - Select the MCU from the **MCUs** drop-down list.
4. Click **Update**.

Configure an Error Notification

Configure the notification options to receive an email for specified errors containing a wildcard value in the message.

To configure an MCU capacity notification:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Notifications**.
2. In the **Setup | Errors** section, click **Add Notification**.
3. Update the information in the following fields:
   - Add the email address for the connection notification delivery in the **Email** field.
   - Add the wildcard character(s) in the **Wildcard** field.
4. Click **Update**.