OPERATIONS GUIDE

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Polycom® RealAccess™

On-Premises Edition

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Before You Begin

This document tells you how to use the Polycom® RealAccess™, On-Premises Edition service delivery platform to review the usage and performance of your Polycom collaboration network and administer some aspects of that network.

Overview of RealAccess, On-Premises Edition Service Delivery Platform

The RealAccess, On-Premises service delivery platform gives you actionable information about your Polycom collaboration solutions. The RealAccess, On-Premises service delivery platform resides on servers within your company's firewall.

The RealAccess platform retrieves information from the customer's Polycom® RealPresence® Distributed Media Application™ (DMA™) system and Polycom® RealPresence® Resource Manager system and reports on any and all Polycom endpoint products your collaboration network might have.

Audience and Purpose

This *Polycom RealAccess On-Premises Edition Operations Guide* provides information primarily for two 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 a Polycom collaboration network, manage user accounts, and maintain the network infrastructure

This Operations Guide assumes the user is familiar with concepts and terms related to the configuration, operation, and performance of the user's collaboration network. In addition, this document assumes the user has experience or familiarity with the following:

- Polycom-related Microsoft products such as Exchange and Skype
- Video conferencing technology
- Network and database administration

Related Documentation

In addition to this guide, the available documentation that describes the RealAccess, On-Premises service delivery platform includes:

- *Polycom RealAccess On-Premises Edition Deployment Guide*
- *Polycom RealAccess On-Premises Edition Release Notes*

* *Polycom RealAccess Offer of Source for Open Source Software*

Get Help

For more information about installing, configuring, and administering Polycom products, refer to **Documents and Downloads** at Polycom Support.

Polycom and Partner Resources

To find all Polycom partner solutions, see Strategic Global Partner Solutions.

The Polycom Community

The Polycom Community gives you access to the latest developer and support information. Participate in discussion forums to share ideas and solve problems with your colleagues. To register with the Polycom Community, simply create a Polycom online account. When logged in, you can access Polycom support personnel and participate in developer and support forums to find the latest information on hardware, software, and partner solutions topics.

Getting Started

To get started with the RealAccess, On-Premises Edition service delivery platform, use this section to learn the following:

- What capabilities the platform provides
- How to access the platform
- How to manage your personal profile

What is RealAccess, On-Premises Edition Service Delivery Platform

The platform does the following:

- Retrieves Call Detail Records (CDR) data from the RealPresence Distributed Media Application (DMA) system and RealPresence Resource Manager system, which form the core of your Polycom collaboration solution. The RealAccess platform pulls CDR data every five minutes.
- Pulls your collaboration network's asset inventory from the RealPresence Resource Manager system every 24 hours.
- Pulls data about your network's MCUs from the RealPresence DMA system every five minutes.
- Displays comprehensive reports about your collaboration solution in easy-to-read, customizable dashboard formats and detailed, customizable lists of individual endpoints. The RealAccess platform refreshes the data it displays every 15 minutes.

With this information, you can figure out how to increase the effectiveness and efficiency of your collaboration network and improve your users' experience with, and adoption of, the collaboration tools you have provided them.

The RealAccess platform does *not* provide real-time reporting. All data displayed is at least 15 minutes old.

On-Premises for Added Security

The RealAccess, On-Premises Edition service delivery platform is installed within your organization's network and, therefore, is able to meet extra requirements your organization may have for security, compliance, or governance. For example, your organization might require the RealAccess platform to run completely behind your firewall. For more information on how RealAccess, On-Premises Edition service delivery platform is configured, see *Polycom RealAccess, On-Premises Edition Deployment Guide*.

Customers who use the RealAccess, On-Premises Edition platform have the option to completely block the platform's access to the Internet. However, users will not be able to access and view training videos for Polycom endpoints from the RealAccess Tutorial Library.

Asset Management Reports

The RealAccess platform inventories equipment throughout your collaboration network so you can quickly assess whether equipment is:

- Up-to-date
- Implemented logically and consistently
- Active or inactive

In this way, you can make good decisions on adding, removing, updating, or replacing equipment.

Details about Your Endpoints

The platform provides the following details about the endpoints in your collaboration network:

- Whether or not users have used the endpoints in the last 30 days
- Endpoint models and how many of each model you have
- Endpoint types and how many of each type you have
- Location of endpoints and how many are at each location
- Software release and how many endpoints are running each release
- Serial number of each endpoint

Custom Details You Want to See

You can view detailed, filterable lists of some or all endpoints in your network or view dashboard summaries filtered and sorted hierarchically in one of two ways:

- Starting with Location

```
Active/Inactive
 └Location
   └Type
     └Model
       └Release
```

- Starting with Type

```
Active/Inactive
 └Type
   └Model
     └Release
       └Location
```

Analytics Reports

The platform provides, in dashboard formats, comprehensive data on the activity of your endpoints, compiling information based on a multitude of options. The platform also displays filterable and detailed lists of individual endpoints.

Reports on Endpoint Usage and Meetings

You can find out the following types of information:

- How many meetings and calls are occurring and how long they last
- How many Virtual Meeting Rooms (VMRs) are being used and for how long
- Who is participating in conference calls
- Where the greatest and least usage is occurring, based on:
  - Location
  - Endpoint type
  - Equipment model
- Where the heaviest users are located
- How the usage changes over time

Reports on Call Errors

You can find out the following types of information:

- Where the most and fewest call errors are occurring, based on:
  - Location
  - Endpoint type
- Where the users with the most errors are located
- What locations and endpoint types have the highest success or failure rates
- Where specific types of errors are occurring, based on:
  - Location
  - Endpoint type
  - Specific individual endpoints

Reports on Bridge Usage

You can find out the following types of information regarding your bridges (MCUs):

- How much capacity is being used, based on:
  - Location
  - Number of ports
  - Percentage of ports
  - Audio versus video calls
- Peak usage rates and times

Maintenance and Customization

The platform provides a variety of tools you need to configure and maintain the platform.

Customizing the Platform

You can enhance the reporting you see on the displays by specifying easily-recognizable names for the following:

- MCUs
- Locations
- Software releases

You can customize how call types are defined so that calls with specific bit rates or from specific sources are reported as video, audio, content, or something else.

You can also have the platform send you notifications when there are issues with any of the following aspects of your collaboration network:

- Call errors
- MCU capacity thresholds
- Connection changes from your platform to the RealPresence DMA system or RealPresence Resource Manager system

Maintaining the Platform

A number of tools are available to help you ensure proper reporting and maintain the integrity of your platform, including the tools to perform the following tasks:

- Add, update, and remove users
- Manually download and export call data
- Back up data
- Add domains and servers
- Manage SSO logins and system certificates
- Test and troubleshoot your connections to the RealPresence DMA system and RealPresence Resource Manager system
- Manually load all inventory data from your RealPresence Resource Manager system

Training Users on Collaboration Equipment

The platform provides a variety of training videos about how to use the most common Polycom endpoint equipment. Your users can log into the platform and watch the appropriate videos for training. In this way, your users can become more effective in the use of their collaboration equipment, which in turn can increase user satisfaction, adoption rates, and overall communication within your company.

Your RealAccess, On-Premises Edition service delivery platform and your users must have Internet access to view the training videos.

Training videos are available for the following endpoint equipment:

- Polycom® RealPresence® Group Series solution
- Polycom® HDX® Series solutions
- Microsoft® Lync® 2010
- Microsoft® Lync® 2013
- Polycom® RealPresence® Desktop for Mac® video collaboration software
- Polycom® RealPresence® Desktop for Windows® video collaboration software
- Polycom® RealPresence® Mobile application
- Polycom® Touch Control interface

Working in the RealAccess Service Delivery Platform

To begin working in the RealAccess platform, you need to log in. You might also change your profile, which defines your name and time zone and allows you to upload a photo.

Log In

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

To log in:

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

Update Your Name, Time Zone and Photo

Update your user profile to specify your time zone and upload your photo.

If you do not have permissions to update information in your user profile, ask your system administrator to make changes.

To update your name, time zone, and photo:

1. In the top-right corner of the RealAccess platform page, click your email address and click **User Profile**.
2. Select your time zone from the **Time Zone** drop-down list.
3. Click **Upload Photo** to locate and select a photo for your profile.

   Most standard graphic formats are supported for your photo.
4. Confirm that your changes are correct and click **Save**.

View Tutorial Videos

The **Tutorial Library** page contains video tutorials for using most Polycom and industry standard endpoints. Users with the **Videos** permission can view tutorial videos to learn about how to effectively use their Polycom collaboration endpoints.

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

Securing the System

To provide convenient and secure access for your users, you can set up Single Sign-on and SSL on the RealAccess, On-Premises service delivery platform.

Configure Single Sign-on (SSO)

To allow users to use Single Sign-on (SSO) and log into the RealAccess, On-Premises service delivery platform using their company credentials, you must configure SSO in the RealAccess platform. After SSO is configured, RealAccess allows users to perform their first login with their company credentials. RealAccess also adds each user to the user list at the user's first login.

This option is available if you included it in your initial onboarding and deployment through Polycom.

To configure Single Sign-On:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > SSO Configuration**.

2 In the **Setup | SSO Configuration** page, configure the following fields. SSO administrator assistance is required.

SSO Configuration Field Descriptions and Examples

Field	Description	Example
Site URI	URL and port to your company's authentication server.	Example: https://raop.company.com:444.
Metadata GUID	URL to retrieve GUID for the RealAccess platform. The URL uses the following pattern: https://SITE_URI/saml/getmetadata/GUID.	Example: https://raop.company.com:444/saml/getmetadata/936b1f4c-92c7-4962-ae7b-e9bd866d226a.
Client Name	The name of the organization running RealAccess (used for logging).	Example: Default Company.
RealAccess URL	The URL that the RealAccess platform uses for SAML SSO service.	Example: https://raop.company.com.
IDP Location	URL to your company's SSO Identity Provider.	Example: https://asfs.company.com/FederationMetadata/2007-06/FederationMetadata.xml

SSO Configuration Field Descriptions and Examples (continued)

Field	Description	Example
X509 Signing Key	The x509 signing key in the metadata from the Federation Server.	Example: MIICdACjBgj5LIgdTvZEEtTwhFQJ0A0mihfF6VZPouUxOtC jbSefieTLdjt3jT5Wqli5CeNv5kxdtB07P8XRJE92vfB0XM1W AWCaFGVYjSsi2FSacUV4UxbIejSnz9ADgmixz2BKrhjmLI 2ARLueHDbi7KolDEJVZ1lsVpQ4sIoyCKPW98LZqT6BDXy eziPed0b96dZqXe6q8z6tmDrADMmw4kxqdDDx7xNvsWsZ AUNNhDULhPWepVvMSwt6n9Jav7WqZUryPd7Gt45NJYz 4dYGog57L3IGlvKOndVxCNw9tI2EZAfElBJZj6bdyk1R5nK 8OB4qPWZMtz2dQau5YcPBLVskWNtHZqHVj7Guyl9lH9e 0UuUgs06iNbbrkwTGiHKNQ7BB6Da1MEwdWwUvEzL4x0 6mFOpqBbiiIrtGUANC2BWUKwBjqFGunaOXGVF2KJ1gC TxpMdJK5v5jJU6WVxfS9wb3bcDXfWjFhgi25tCnf3blHDu0 ZvW4Uvgto8BuVCIOhKD60gj6CFOH7HVKqyMOojsw3Cqn eVFYvWUHx3oPVnB0FwjxcKwZF6CJ1rLz6ZzHzmFhV8qq wH3OfOGKnxVd54hgtfo3BvG4qlvneXYPuKkGs9PzoSFs0 As7iCHVaXoGObBdp54qfwHEQfQENDcl7o3TPKMqvU7ij WXvnuG6A9iYsJWK7nJi9V4IY1X4Q7mC5AxDteyIGf3Z9i8 ujspPRyvSm9IFaiXbOHzhIZEyDcXrPVgMExYcq5GI5mXP Js8mfbri9N6q7eVT5YUto8TDbAw29GgIHUWH7Dzgv2xQi ZMINy39daF5HBB2IPwlhR8a6IeoRfcgvnXkjA8PZUgGMmf JIN3dysDuwosDDGBbjkeAr7Gos10cUgCWN4dFBEt9eLZf VKGhOYDa7z8NWSkXAGTydVZsm3gKqrMBf3Mld5iJ10m Ol0zPHscAMXjRXCAEWyJel2XLhEvHOeu5htNsnefHx8or1 CkGR7O==
X509 Encryption Key	The x509 encrypting key in the metadata from the Federation Server.	Example: MIICdACjBgj5LIgdTvZEEtTwhFQJ0A0mihfF6VZPouUxOtC jbSefieTLdjt3jT5Wqli5CeNv5kxdtB07P8XRJE92vfB0XM1W AWCaFGVYjSsi2FSacUV4UxbIejSnz9ADgmixz2BKrhjmLI 2ARLueHDbi7KolDEJVZ1lsVpQ4sIoyCKPW98LZqT6BDXy eziPed0b96dZqXe6q8z6tmDrADMmw4kxqdDDx7xNvsWsZ AUNNhDULhPWepVvMSwt6n9Jav7WqZUryPd7Gt45NJYz 4dYGog57L3IGlvKOndVxCNw9tI2EZAfElBJZj6bdyk1R5nK 8OB4qPWZMtz2dQau5YcPBLVskWNtHZqHVj7Guyl9lH9e 0UuUgs06iNbbrkwTGiHKNQ7BB6Da1MEwdWwUvEzL4x0 6mFOpqBbiiIrtGUANC2BWUKwBjqFGunaOXGVF2KJ1gC TxpMdJK5v5jJU6WVxfS9wb3bcDXfWjFhgi25tCnf3blHDu0 ZvW4Uvgto8BuVCIOhKD60gj6CFOH7HVKqyMOojsw3Cqn eVFYvWUHx3oPVnB0FwjxcKwZF6CJ1rLz6ZzHzmFhV8qq wH3OfOGKnxVd54hgtfo3BvG4qlvneXYPuKkGs9PzoSFs0 As7iCHVaXoGObBdp54qfwHEQfQENDcl7o3TPKMqvU7ij WXvnuG6A9iYsJWK7nJi9V4IY1X4Q7mC5AxDteyIGf3Z9i8 ujspPRyvSm9IFaiXbOHzhIZEyDcXrPVgMExYcq5GI5mXP Js8mfbri9N6q7eVT5YUto8TDbAw29GgIHUWH7Dzgv2xQi ZMINy39daF5HBB2IPwlhR8a6IeoRfcgvnXkjA8PZUgGMmf JIN3dysDuwosDDGBbjkeAr7Gos10cUgCWN4dFBEt9eLZf VKGhOYDa7z8NWSkXAGTydVZsm3gKqrMBf3Mld5iJ10m Ol0zPHscAMXjRXCAEWyJel2XLhEvHOeu5htNsnefHx8or1 CkGR7O==

SSO Configuration Field Descriptions and Examples (continued)

Field	Description	Example
First Name	The passed attribute which contains the user's first name.	Example: givenName. **IMPORTANT:** This attribute must be configured to be passed in the SSO assertion.
Last Name	The passed attribute which contains the user's last name.	Example: lastName. **IMPORTANT:** This attribute must be configured to be passed in the SSO assertion.
Email	The passed attribute which contains the user's email address.	Example: mail. **IMPORTANT:** This attribute must be configured to be passed in the SSO assertion.

3 Click **Submit**.

Upload a Certificate for SSL

The RealAccess, On-Premises service delivery platform uses SSL to protect browser connections between users and the RealAccess server. To ensure this connection is secure, upload an SSL certificate using a PFX file.

To upload a certificate for SSL:

1 Generate or obtain a PFX file that contains an identify certificate for your Web server and, if necessary, the complete certificate chain of intermediate and root certificates.

Though self-signed certificates are accepted, Polycom recommends the use of certificates signed by a certificate authority (CA).

2 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > PFX Certificate**.

3 In the **Setup | PFX Certificate Upload** page, click **Upload PFX Certificate**.

4 Navigate to the PFX file and click **Open**.

5 Click **Submit**.

RealAccess Analytics Reports

Use RealAccess Analytics to understand how your collaboration solutions are used and how they are performing.

By default, you must wait 24 hours after deploying the RealAccess service delivery platform before the Analytics call data is fully available. However, you can retrieve the asset inventory of your collaboration network right away. See Manually Retrieve Your Complete Endpoint Inventory .

Calls, Meetings, and VMR Conferences

The RealAccess service delivery platform displays data about calls, meetings, and Virtual Meeting Room (VMR) conferences. In the RealAccess service delivery platform, these activities differ in the specific events they represent:

- **Call** — A call can be a participant call to a VMR, a point-to-point call between endpoints, or a point-to-point call needed to set up a conference, recording, or content-sharing.
- **Meeting** — A meeting is a point-to-point call between actual endpoints or a VMR conference. Meetings do not include point-to-point calls that are made to start recording or content-sharing.
- **VMR conference** — A Virtual Meeting Room (VMR) conference is a call made to set up a conference using a VMR code. VMR conferences do no include participant calls to a VMR.

Viewing Conference Calls

You can review conference calls through a variety of reports, including utilization trends, and meeting information.

View Conference Utilization Trends Report

You can review data on usage of Virtual Meeting Rooms (VMRs). In this way, you can see if user adoption of VMRs is improving, who has been using VMRs, and what type of VMR is most in use. Data can include any of the following:

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

You can also filter the data for specific types of VMRs (for example, Polycom standard VMR or RealConnect VMRs).

To view the Conference Utilization Report:

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

2 Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame.

3 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**

4 Click **Select All** or any one or combination of the following from the **Conference Type** drop-down list:

- **VMR**
- **Scheduled**
- **RealConnect**
- **LYNC_CAA**

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

Access More Details about a Room's Conferences

You can directly access the **Conference Dashboard** for any **Room ID** that appears in the **List View**.

To access a Room ID's Conference Dashboard:

» In the **List View**, click the **Room ID** whose **Conference Dashboard** you want to view.

Customize the List View

You can change what data the **List View** displays and sort the data based on any data element that is displayed.

To customize the List View:

1 Click **Edit Columns**.

2 Select the check box for each option you want to include.

For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

3 Select the check box on any previously-selected option you want to hide.

4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

View Conference Dashboard

View the details about individual conferences, including who the participants are in the conferences. This information helps you get a more accurate picture of adoption rates, since the other RealAccess reports do not count participant calls to a VMR as conference calls.

To view the Conference Dashboard:

1. Do one of the following:
   - Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Conference > Dashboard**.
   - From the **Conference Utilization List View**, click the conference **Room ID** of a conference whose **Conference Dashboard** you want to see.

     The **Conference Dashboard** appears. If you accessed the page from the **Conference Utilization** page, the page lists applicable conferences for the specific **Room ID** and **User ID** you selected.
2. If you accessed the **Conference Dashboard** from the **Analytics | Conference** menu, do one of the following:
   - From the **Room id** drop-down list, select the Room ID you want to review.
   - From the **User id** drop-down list, select the user ID you want to review.
3. Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame.
4. Click **Select All** or any one or combination of the following from the **Conference Type** drop-down list:
   - **VMR**
   - **Scheduled**
   - **RealConnect**
   - **LYNC_CAA**
5. Click one of the following options in the Calls drop-down list in the **Filters** section:
   - **All Calls**
   - **Calls over 5 minutes**
   - **Calls under 5 minutes**

   The counts in the graphs change based on your selections.
6. In the **List View** at the bottom of the page, review data for individual conferences included in the selected time frame and filters.

View the Participants in a Conference

You can see the participants of a conference and how long they were in the conference.

To view the participants in a conference:

» In the **List View**, click the plus sign (**+**) next to a conference to see the participants of that conference.

A list of participants appears. A **Conference Profile** graph also appears, summarizing at multiple intervals how many participants were in the conference.

View Meeting Summary Report

You can quickly review meeting activity across the whole organization, including the following data:

- Count of meetings (based on incidences where a bridge is used)
- 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, you can review specific details about each call, for example, type, VMR number, whether it was a point-to-point meeting, duration, user ID, number of participants, and more. In this way, you can quickly see where and what equipment is being used and who is using it.

To view the Meeting Summary Report:

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

2 Click the time frame you want in the **Period of Analysis** drop-down list.

3 Click one of the following options in the Calls drop-down list in the **Filters** section:

   - **All Calls**
   - **Calls over 5 minutes**
   - **Calls under 5 minutes**

   The counts in the graphs change based on your selections.

4 Click the appropriate option in the **Hours of Meetings/Duration of Meetings** drop-down list in the **Filters** section.

   The **Call Type** and **Collaboration Activity** graphs change based on your selection,

5 In the **List View** at the bottom of the page, review data for individual meetings included in the selected time frame. If an endpoint was not identified in the RealAccess service delivery platform because it was not attached to a site, the List View shows **Unknown** in one or more columns. Only point-to-point calls between actual user endpoints are identified as meetings. Other point-to-point calls that are listed are associated with conference recording requests or content sharing.

   For descriptions of the call characteristics in List View, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1. Click **Edit Columns**.
2. Select the check box for each option you want to include.
3. Select the check box on each previously-selected option you want to hide.
4. Click a column header to sort the calls listed based the data values in that column.

   For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

Viewing Call and VMR Activity

You can review call volumes and call duration across your whole organization or look for more detailed information for selected locations, endpoint types and models, and VMRs.

View Utilization Summary Report

You can review a summary dashboard with comprehensive call data of your network's usage. 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). For example, you can see which of the following are making the most calls:
  - Collaboration rooms
  - Locations
  - System types
  - Models
  - Combination of location and system type (Champions)
- View the trend of changes over time for the following:
  - Number of Calls
  - Duration of calls
  - Percentage of time rooms are used
  - Number of VMR meetings

To view the Utilization Summary Report:

1. Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Summary**.
2. Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame,
3. Click one of the following options in the Calls drop-down list in the **Filters** section:
   - **All Calls**
   - **Calls over 5 minutes**
   - **Calls under 5 minutes**

   The counts in the graphs change based on your selections.
4. Click the appropriate option in the **Hours of Meetings/Duration of Meetings** drop-down list in the **Filters** section.

   The **Highlights** graphs change based on your selection,
5. 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.

Print the report

You can print the report and use it for historical purposes and to create your own reports.

To print the report:

1. Click **Print**.

   The standard print dialog box for your computer appears.
2. Select the appropriate options for printing the report, which you can send to a printer or print to a pdf file.

View Utilization Trends Report

You can review detailed information about how your organization’s call volumes change day-to-day in the time period you specify. This information can help you determine user adoption rates for the whole network or for specific types of equipment or meetings available to users. The information can also help you anticipate peak traffic times.

To view the Utilization Trends Report:

1. Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Trends**.
2. Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame,
3. In the **Call Type** drop-down list, click **Select All** or any single or combination of desired options.

   The graph and **List View** change to reflect the filter selections you made.
4. In the **System Type** drop-down list, click **Select All** or any single or combination of desired options.

   The graph and **List View** change to reflect the filter selections you made.

5 In the **Model** drop-down list, click **Select All** or any single or combination of desired options.

The graph and **List View** change to reflect the filter selections you made.

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

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1 Click **Edit Columns**.

2 Select the check box for each option you want to include.

For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

3 Select the check box on any previously-selected option you want to hide.

4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

View Utilization Monthly Report

You can review the month-by-month total duration of calls, by system type and call type. From the total length of time on calls, you can determine user adoption rates for specific configurations or use of video versus audio calls. You can also check either the whole network or specific locations for activity.

To view the Utilization Monthly Report:

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

2 Next to the **System Type** graph, click **All Sites** or a desired location from the first drop-down list in the **Filters** section.

3 Next to the **System Type** graph, click the desired year from the second drop-down list in the **Filters** section. The default is the current year.

4 Next to the **Call Type** graph, click **All Sites** or a desired location from the first drop-down list in the **Filters** section.

5 Next to the **Call Type** graph, click the desired year from the second drop-down list in the **Filters** section. The default is the current year.

Save the Data to a File

You can save data from each graph to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

View Utilization List View Report

You can review, over a specific time period, the number of calls and call duration for individual devices registered to your RealPresence Resource Manager system. You can view all devices in your network or filter the list to show specific types of devices. In this way, you can quickly determine whether individual endpoints are being used and by how much. A lack of use might indicate a lack of training, resistance to the technology, selection of an endpoint type less suitable for the environment, or chronic issues with network connections. Conversely, you can look at high use endpoints to determine reasons for successful adoption that might be applied to other endpoint implementations. For example, you might be able to locate users who can participate in peer-to-peer adoption campaigns.

To view the Utilization List View Report:

1. Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Utilization > List View.**
2. Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame.
3. Click **Select All** or any single or combination of desired options in the **System Type** drop-down list. The **Content** type refers to calls in which content sharing occurred.

   The **List View** changes to reflect the filter selections you made.

The **Percent** column reflects the percentage of time the endpoint was in use for the specified time period. 100% means the endpoint was in use 8 hours per day, five days per week, for a total of 40 hours per week.

Customize the List View

You can sort the calls in the **List View** based on any data element that is displayed.

To customize the List View:

» Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

View Endpoint Dashboard

You can review daily or hourly call activity for the specific model type at a specific location in your system. This information can help you pinpoint problem areas after you have determined that endpoint types in general or endpoints types in a specific location are not being used effectively. You can view the following types of information about an endpoint:

- 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 Utilization Endpoint Dashboard:

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 model of endpoint you want to view.
5. Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame.
6. Click one of the following options in the Calls drop-down list in the **Filters** section:
   - **All Calls**
   - **Calls over 5 minutes**
   - **Calls under 5 minutes**
7. In the **List View** at the bottom of the page, review information for individual calls included in the selected time frame and filters.

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1. Click **Edit Columns**.

2 Select the check box for each option you want to include.

For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

3 Select the check box on any previously-selected option you want to hide.

4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

Remotely Connect to the Endpoint Directly from the Endpoint Dashboard

If you need to access an endpoint to manage its configuration, you can do so quickly and directly from the Endpoint Dashboard.

To remotely connect to the endpoint directly from the Endpoint Dashboard:

» Click the **Manage** link in the upper left of the Endpoint Dashboard page.

The **Admin Login** page for the endpoint appears in your browser.

Capacity Usage Reports

You can review the peak levels of usage of your system, overall and for the individual MCUs. You can check usage as percentages of total capacity, maximum connections, and port usage.

View RMX® Utilization Report

You can check 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 the RMX Utilization Report:

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

3 For either graph, change the selection in the **Resources** drop-down list to view capacity usage for video or audio ports only. The default **Capacity** includes all resources.

4 For either graph, select **Ports** in the **Utilization** drop-down list to view capacity usage based on the number of ports used.

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

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

Save the RMX Capacity Usage Data to a File

You can save data to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save RMX capacity usage data to a file:

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 Concurrent Connections Report

You can review the maximum number of concurrent connections in your system in each hour or each day, depending on time period you specify. You can also view a detailed list of how registered devices are being used over a selected time period and for specific types of systems.

To view the Concurrent Connections Report:

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

2 Click a time frame in the **Period of Analysis** drop-down list to view concurrent connections in a particular time frame.

3 In the **System Type** drop-down list, click **Select All** or any single or combination of desired options. The **Content** system type refers to endpoints that shared content on calls.

The graph and **List View** change to reflect the filter selections you made.

4 In the **List View** at the bottom of the page, review data for individual connections that occurred in the selected time frame and filters.

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1 Click **Edit Columns**.

2 Select the check box for each option you want to include.

For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

3 Select the check box on any previously-selected option you want to hide.

4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

Troubleshooting Endpoint Connections

With the **Performance** pages in your RealAccess service delivery platform, you can identify and understand connection errors in your network. With this information, you can determine possible causes of errors. For example, a high frequency of errors for endpoints in a particular location could indicate a problem with an MCU, a router, or some other element in the network. Some errors may indicate an administration error or a change in dial plan for a destination.

View Performance Summary

You can get a quick overview of connection errors in your network by reviewing lists that summarize the following:

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

You can see a list of the most frequent types of errors and click a link to immediately see details on each type of error. Finally, you can review tallies of the locations and call types with the highest success rates to establish benchmarks for performance and to eliminate locations or system types as you troubleshoot the sources of errors.

To view the Performance Summary Report:

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

2 Click a time frame in the **Period of Analysis** drop-down list to view errors that occurred in that particular time frame,

3 Click either **Source** or **Destination** in the **Filter** drop-down list to sort error counts based on whether the destination or the source had the error, For example, if you select **Destination**, then the **Site** graph shows the number of errors for each location when the endpoints at that location were destinations of attempted calls.

The data in the graphs change according to your selection.

Print the report

You can print the report and use it for historical purposes and to create your own reports.

To print the report:

1 Click **Print**.

The standard print dialog box for your computer appears.

2 Select the appropriate options for printing the report, which you can send to a printer or print to a pdf file.

View Performance Error Dashboard

You can review details of a specific error type including a variety of count lists for that error type, with subtotals for specific categories to help you recognize how and where the error happens. You can determine the error type's frequency of occurrence for the following:

- Locations
- System types
- User IDs
- Endpoints

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

In addition, you can review details about each incidence of the error, for example, the source, destination, and system type involved with each failed connection.

To view the Performance Error Dashboard:

1 Display the **Performance | Summary** page and select options to display the data your want. See View Performance Summary.

2 From the **Disconnection Cause** list, click on an error type.

The **Performance Error Dashboard** appears.

3 Click a time frame in the **Period of Analysis** drop-down list to view errors that occurred in that particular time frame.

4 Click either **Source** or **Destination** in the **Filter** drop-down list to sort error counts based on whether the destination or the source had the error, For example, if you select **Destination**, then the **Site** graph shows the number of errors for each location when the endpoints at that location were destinations of attempted calls.

   The data in the graphs change according to your selection.

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

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1 Click **Edit Columns**.

2 Select the check box for each option you want to include.

   For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

3 Select the check box on any previously-selected option you want to hide.

4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

   An Excel file is automatically downloaded to the Download folder on your computer.

View Performance Trends Report

You can see how the number of errors changes day-to-day or hour-to-hour and shows when peaks in error counts occur.

To view the Performance Trends Report:

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

2 Click a time frame in the **Period of Analysis** drop-down list to view errors that occurred in that particular time frame.

3 In the **Call Type** drop-down list, click **Select All** or any single or combination of desired options.

   The graph and **List View** change to reflect the filter selections you made.

4 In the **System Type** drop-down list, click **Select All** or any single or combination of desired options.

   The graph and **List View** change to reflect the filter selections you made.

5 In the **Model** drop-down list, click **Select All** or any single or combination of desired options.

   The graph and **List View** change to reflect the filter selections you made.

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

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1 Click **Edit Columns**.

2 Select the check box for each option you want to include.

   For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

3 Select the check box on any previously-selected option you want to hide.

4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

   An Excel file is automatically downloaded to the Download folder on your computer.

View Performance Network Report

You can review the number of calls impacted by packet loss within a selected time frame and identify the sites, system types, and specific systems that had the issues.

To view the Performance Network Report:

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

2 Click a time frame in the **Period of Analysis** drop-down list to view issues that occurred in that particular time frame.

3 In the **Site** list, select one or more locations you want to see.

   The graph and **List View** change to reflect the filter selections you made.

4 In the **System Type** drop-down list, click **Select All** or any single or combination of desired options. The **Content** system type refers to endpoints that shared content on calls.

   The graph and **List View** change to reflect the filter selections you made.

5 From the **Network Flags** drop-down list, select either **Warning** or **Critical** to filter issues based on severity, **Critical** issues are issues that needs immediate attention. **Warning** issues are issues you need to know but you don't need to fix.

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

6 In the **List View** at the bottom of the page, review data for individual errors included in the selected time frame and filters. The errors are listed as packet loss (PL) and whether the loss occurred in transmission (**TX**) or receipt (**RX**).

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1 Click **Edit Columns**.

2 Select the check box for each option you want to include.

   For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence Resource Manager system.

3 Select the check box on any previously-selected option you want to hide.

4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

   An Excel file is automatically downloaded to the Download folder on your computer.

Customizing Analytics Reports

You can change how some data is displayed in your reports to account for changes to your equipment or to make names of components easier to identify.

Eliminate Duplicate Endpoints in Reports

An endpoint might be showing up in reports twice. This situation can occur if you replace endpoint equipment or the serial number of the endpoint was not available when the endpoint was installed. In these cases, RealAccess historical report data now include both the new and removed/updated endpoints as associated with the room because historical data is never deleted. To eliminate this duplication, you can merge the data from the old endpoint into the data for the new endpoint so there is continuity of usage for that room.

When you merge endpoints, the new endpoint (usually the endpoint you want to keep in future reporting), is selected as the *master* and data from the old endpoint is merged into data for the master.

To eliminate two listings of the same endpoint:

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, find the system name of the endpoint, normally the new endpoint, you want to appear in future reports. This endpoint is considered the *master*.

3 Note the number in **Id** column for the master endpoint. This number is the globally unique identifier (GUID) for that endpoint.

4 In the **Enter Endpoint Master Guid** field, enter the GUID of the master endpoint.

Be sure the master you specify is the endpoint that will continue in service. This step is irreversible within the RealAccess.platform. Selecting the obsolete endpoint as the master will cause the RealAccess platform to stop collecting data on future activity of the endpoint remaining in service.

5 In the **Endpoint Grid** list, locate the master endpoint and the endpoint you want to eliminate, and enable the check box for each.

6 Click **Merge endpoints**.

Hide Individual Endpoints from Reports

You can prevent, or allow, specific endpoint assets from being included in the various RealAccess reporting pages. You might choose to hide some endpoints in order to make your asset metrics and reports more useful for you. For example, if the assets don't work at all or were very recently added, the assets' call data might skew data you are preparing for a management report.

To hide individual endpoints in report data:

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 display the **Edit** button, scroll to the right with your keyboard's arrow keys or with the scroll bar at the bottom of the page. You can also use **Edit Columns** to hide some columns of data and bring the Edit button into view.

3. Disable the check box in the **Count in Performance** column to hide the endpoint from performance metrics.
4. Disable the check box in the **Count in Utilization** column to hide the endpoint from utilization metrics.
5. Click **Update**.

Change the System Type for Individual Endpoints

The RealAccess platform captures the system type of each endpoint by pulling the information from your RealPresence DMA system. However, the RealPresence DMA-administered system type might not reflect the way you actually want to track data about the endpoint. For example, you might have three administered Room systems that are, in truth, collectively an Immersive system. In this case, you might want activity on the systems to be reported as Immersive systems.

To change the system type for individual endpoints:

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**.
3. Select an option from the drop-down menu in the **L2 System Type** column to override the administered System Type shown in the **Type** column.
4. Click **Update**.

Specify the MCU Type for Correct Port Reporting

The RealAccess platform calculates the ports available on your MCUs based on how the MCU is administered. However, by default, these calculations are also based on the maximum ports available on legacy RMX® products such as a Polycom® RealPresence® Collaboration Server (RMX) 2000. If an MCU uses an MPMRX card or is a RealPresence Collaboration Server Virtual Edition, you must tell the RealAccess platform that the MCU is one of these two types. If you do not, the RealAccess platform assumes the MCU to be a legacy MCU and does not accurately report the number of ports available.

To specify the MCU type for correct port reporting:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Dictionaries > MCU Friendly Name**.
2. In the **Setup | MCU Friendly Name** page, choose a product and click **Edit**.
3. Select one of the following options in the **MCU Type** field:
   - **MPMRx** — The MCU has an MPMRX card.
   - **RPCS VE** — The MCU is a RealPresence Collaboration Server.
   - **Legacy RMX** — This is the default. Use this option to change the MCU type back if you incorrectly assigned one of the other types.
4. Click **Update**.

Remove an MCU from Analytics

In order to maintain integrity of historical data, the RealAccess platform 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 **Admin** page and go to **Dictionaries > 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 check box.
4. Click **Update**.

User-Friendly Aliases

To make reports easier to understand, you can assign “friendly names” or aliases for some components in the RealAccess platform.

Assign an MCU Alias

Give your MCUs more recognizable names in the RealAccess reports.

To configure an MCU alias:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Dictionaries > MCU Friendly Name**.

2 In the **Setup | MCU Friendly Name** page, choose an MCU and click **Edit**.
3 Update the information in the **Friendly Name** field:
4 Click **Update**.

Assign a Site Alias

A site, as listed in the RealAccess platform, is originally defined within your RealPresence Resource Manager system. Technically, a site is a local area network (LAN) that generally corresponds with a geographic location such as an office or plant. A site contains one or more network subnets, so an endpoint's IP address identifies the site to which it belongs. Therefore, a site name usually, *but not always*, reflects a location at which one or more endpoints connect to your collaboration network.

As necessary, give your sites more recognizable location names in the reports.

To configure a site alias:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Dictionaries > 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:

Field	Description
Friendly Name	The name for the location that should appear for the site in reports.
City Name	The name of the city where the site resides.
Country Name	The name of the country where the site resides.
Longitude	The longitude of the site.
Latitude	The latitude of the site.

4 Click **Update**.

Assign a Software Version Alias

Give the software versions of your endpoints more recognizable names in the reports. For example, the software version for a VVX endpoint, as reported from your RealPresence Resource Manager system, might show **5.5.1.10290 polycomvvx-vvx_411-ua/5.5.1.10290**. You can rename this version for your reports as **5.5.1.10290** or **5.5.1**.

To configure a software version alias:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Dictionaries > Software Version Friendly Name**.
2 In the **Setup | Software Version Friendly Name** page, choose a software version and click **Edit**.
3 Update the information in the **Friendly Name** field.
4 Click **Update**.

Managing Call Type Rules

Configure the CDR call type rules in the **Call Log Type Rules** page to customize the call type the RealAccess platform applies to calls from specific sources or calls with specific bit rates.

The default call type rules specify the following:

- Audio calls — 64 bits per second (bps) for all sources at priority one
- Video calls — All bit rates except 64 bps for all sources at priority one

Add a Call Type Rule

You can add a CDR call type rule to your RealAccess platform.

Do not attempt to add call type rules without consultation or assistance with the Polycom support personnel. Errors in setting up a call type rule can invalidate some or all call data collected by the RealAccess platform.

To add a call type rule:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **System Admin > Call Log Type Rules**.

2 In the **Setup | CDR Call Types** page, click **Create new rule**.

3 Add the information required for the following fields:

- **BitrateExpression** — The bits per second associated with the call, for example 64 or 256). The following characters can be added to further tailor the specification:
- **SourceExpression** — The label, address, or a portion of the label or address of the call source associated with the call. The format of the specification can be any of the following:
  - **.*@<IP_address>:<port>**, where **<IP_address>** is the IP address of the caller and **<port>** is an optional attribute for the port typically used by that call type (for example, 10.10.10.10:5060)
  - **.*@<domain_name>**, where **<domain_name>** is the domain of the caller
  - **.*;<label>=<name>**, where **<label>** is a CDR attribute label for data in the call and **<name>** is the specific name found for that attribute
- **Call Type Format Rules**

  Select one of the following:
  - **Content**
  - **Audio**
  - **Unknown**
  - **Video**

You cannot configure the **Priority** information.

4 Click **Update**.

Edit a Call Type Rule

You can edit a CDR call type rule to update the rule options.

Do not attempt to edit call type rules without consultation or assistance with the Polycom support personnel. Errors in setting up a call type rule can invalidate some or all call data collected by the RealAccess platform.

To edit a call type rule:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **System Admin > Call Log Type Rules**.
2. In the **Setup | CDR Call Types** page, choose a rule and click **Edit**.
3. Update the information required for the following fields:
   - **BitrateExpression**
   - **SourceExpression**
   - **Call Type Format Rules**

   Note: You cannot configure the **Priority** information.
4. Click **Update**.

Delete a Call Type Rule

You can delete a CDR call type rule from your RealAccess platform.

Do not delete a call type rule without consultation or assistance with the Polycom support personnel.

To delete a call type rule:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **System Admin > Call Log Type Rules**.
2. In the **Setup | CDR Call Types** page, choose a rule and click **Delete**.

Asset Management Reports

You can quickly review information about how your collaboration network is configured, from the location level down to the individual equipment level. As a result, you can check where endpoints are located, what system types are administered, and whether software on those endpoints are up-to-date. You also have the option of tracking endpoints at a department level. In this way, you can quickly assess whether there are any allocation or provisioning issues and whether endpoints of a particular model, system type or location are up-to-date or are consistently provisioned with the same release.

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

View Assets List View Report

You can review a single list of all of the endpoint assets in your network.

To view the Assets List View Report:

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

2 Scroll the list to find the endpoints you want to review.

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1 Click **Edit Columns**.

2 Select the check box to select each option you want to include.

For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

3 Select the check box on any previously-selected option you want to hide.

4 Select a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

View Assets Site Report

You can quickly check, for any location, the number of active or inactive endpoints and counts of endpoints in the following general-to-specific hierarchy of categories:

- Type
- Model
- Software version

This manner of viewing your endpoints lets you quickly identify areas with low usage rates, areas where endpoint software releases are inconsistently applied or out-of-date, and where endpoints are being used and *not* being used according to your adoption goals.

To view the Assets Site Report:

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) or **Inactive**.

   The locations with systems that match your choice appear in the **Systems by site** list, with the location with the highest number of systems listed first by default, and the remaining lists showing progressively more precise endpoint details for that location.
3. From the **Systems by site** list, click the location whose endpoint metrics you want to see.
4. From the **<Active Status> in <Location> by type** list, click the endpoint type you want to see.
5. From the **<Active Status> <Type> in <Location>** list, click the endpoint model you want to see.

   The latest software version available for that endpoint model appears in the **Latest Polycom Software Release** field.
6. Click the specific software version you want to see.

   The endpoint list at the bottom of the page displays specific endpoints based on your selections in the previous steps.

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1. Click **Edit Columns**.
2. Select the check box to select each option you want to include.

   For descriptions of the call characteristics in **List View**, see the inventory report descriptions in the Operations Guide for your RealPresence Resource Manager system.
3. Select the check box on any previously-selected option you want to hide.

4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

View Assets Models Report

You can quickly check the status of your network's endpoints by type. You can quickly see, for any endpoint type, the number of active or inactive endpoints and counts of endpoints in the following general-to-specific hierarchy of categories:

- Model
- Software version
- Location

This manner of viewing your endpoints lets you quickly identify endpoint types with low usage rates, endpoint types where software releases are inconsistently applied or out-of-date, and which types of endpoints are being used and *not* being used according to your adoption goals.

To view Assets Models Report:

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

   The endpoint types that match your choice appear in the **Active systems by type** list, with the type with the highest number of systems listed first by default, and the remaining lists showing progressively more precise endpoint details for that type.
4. From the **<Active Status> systems by type** list, click the endpoint type you want to see.
5. From the **<Active Status> <Type>** list, click the endpoint model you want to see.

   The latest software version available for that endpoint model appears in the **Latest Polycom Software Release** field.
6. From the **Software Release** list, click the software release you want to see.

   The locations that have the selected endpoint model and software release are listed in the **Site** list.
7. From the **Site** list, click the location you want to see.

   The endpoint list at the bottom of the page displays specific endpoints based on your selections in the previous steps.

Customize the List View

You can change what data the **List View** displays about calls and sort the calls based on any data element that is displayed.

To customize the List View:

1 Click **Edit Columns**.

2 Select the check box for each option you want to include.

For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your RealPresence DMA system.

3 Select the check box on any previously-selected option you want to hide.

4 Select a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

You can save data in the **List View** to an Excel spreadsheet file and use it for historical purposes and to create your own reports.

To save the List View data to a file:

» Click **Export**.

An Excel file is automatically downloaded to the Download folder on your computer.

View Assets Map

You can look at a map to quickly determine the location of types of endpoints and see which ones are in use.

If your network contains more than 1000 endpoints, your RealPresence Resource Manager system must be running release 10.1 in order for the Assets Map to display those endpoints.

NOTE: In order to use the Assets Map within Analytics, you must email the name of your customer domain to realaccess@polycom.com. For users to use the Assets Map, you must also allow Internet access for the computers from which users access RealAccess, On-Premises Edition service delivery platform.

To view your endpoint assets on a map:

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

2 Click **Select All** or any single or combination of desired options in the **System Type** list.

3 In the State drop-down list, click **All** or one or more of the following:

- **Off-line** — Include inactive endpoints
- **On-line** — Include active endpoints
- **On-Call** — Include endpoints that were on a call at the last 5-minute update

4 Select one of the following page refresh options:

- **Refresh off**

- **30 secs**
- **1 min**
- **5 min**

5 Review the map for the concentrations of the endpoint types you have identified. The number in each circle indicates the number of endpoints that match your criteria at that location. The circles on the map indicate the following for a particular location on the map:
   - Large circle — a high number of endpoints
   - Small circle — a low number of endpoints
   - Red circle — at least one endpoint is offline (inactive)
   - Green circle — all endpoints are online (active)

6 Click on a circle to see the percentage of endpoints that are online and a list of endpoints by name.

7 In the list of endpoints, roll your cursor over an endpoint to get the following details about that endpoint:
   - Type
   - Model
   - Release
   - Site

8 In the list of endpoints for a location, click on an endpoint name to display that endpoint's dashboard, which displays call activity for that endpoint.

Display a List of All Locations

You can quickly display a list of all the locations from the **Assets Map**.

To view a list of all locations:

» Click **Locations** at the top of the page.

Reset the Assets Map

You can return to a view of the whole world after you have zoomed in on the map to see details about a particular location.

To reset the assets map:

» Click **Reset Zoom**.

Tracking Endpoints by Departments

To keep track of your endpoints for bookkeeping purposes, you can organize the endpoints by departments. Departments you create in the RealAccess platform can reflect how departments are defined in your organization, but they can also be created to reflect individuals who are responsible for administering and maintaining the assets, to reflect the organizations who pay for the endpoints, or some other way that is convenient to you.

The departments you create *do not* change how the RealAccess platform captures and compiles endpoint data. Your department assignations are for your own purposes only.

Create a Department

Create departments to organize your endpoints.

To create a Department:

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

Assign an endpoint to a department to keep track of that endpoint for bookkeeping purposes.

To assign an endpoint to a department:

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

Account Management

You can manage accounts in the RealAccess service delivery platform as follows:

- Change your customer account information.
- Add, change, and delete the domains of your users.
- Add, change, and delete users.

Managing Customer Information

Your initial customer information is configured as part of your system deployment, but you can update the customer information or add and edit new customer domain information on the **Customers** and **Customer Domains** pages.

Edit a Customer Account

You can edit a customer account to update the customer information.

To edit a customer account:

1. Click **Admin** in the lower navigation bar to launch the Admin page and go to **System Admin > Customers**.
2. In the **Setup | Customers** list, choose a customer and click **Edit**.
3. Update the information required for the following fields:

Field	Description
Customer Name	The name of your organization.
SOA	Optional. Your Sales Order Acknowledgment (SOA) number. You can get this number from your Polycom sales engineer or sales representative
Customer PO	Required. The Purchase Order number for this instance of RealAccess platform.
Partner	The customer's partner, if any. If Polycom, select Default Partner.
Admin Email	The administrator email to which service emails should be sent.
Show failed logins	Select if you want to track failed logins on the Admin email.
Primary Contact and **Secondary Contact**	
First Name	First name of the person to contact regarding the RealAccess account.
Last Name	Last name of the person to contact regarding the RealAccess account.

Field	Description
Email	The contact's email address
Title	The title of the contact.
Telephone	The telephone number of the contact

4 Click **Update**.

Add a Customer Domain

You can add a customer sub-domain to your RealAccess platform, which allows users from that sub-domain to sign up and log in to the service. Because the RealAccess platform supports only one primary domain, a sub-domain must be part of that primary domain.

To use SSO to automatically capture users, you must also add the domain and sub-domains, if any, of those users to the RealAccess platform.

To add a customer domain:

1 Click **Admin** in the lower navigation bar to launch the Admin page and go to **System Admin > Customer Domains**.

2 In the **Setup | Customer Domains** page, click **Create Customer Domain**.

3 Add the information required for the following fields:

Field	Descriptions
Customer Name	Drop-down menu of customers (clients) added to the system.
Domain	Domain address for the customer. Be sure to enter the domain *exactly* as users will enter it as part of their email addresses for logging in. This field is case-sensitive. **NOTE:** In order to use the Assets Map within Analytics, you must email the name of your customer domain to realaccess@polycom.com. To use the Assets Map, you must also allow Internet access from your RealAccess, On-Premises Edition service delivery platform.
SSO	Enable the check box if your users will log in with Single Sign-On credentials, and clear the check box if they will not. If you check this box, you must also configure SSO on the **Client Config | SSO Configuration** page.

4 Click **Update**.

Edit a Customer Domain

You can edit a customer domain to update the customer information and options. If you change the primary domain, you must also change or remove any associated sub-domains.

To edit a customer domain:

1. Click **Admin** in the lower navigation bar to launch the Admin page and go to **System Admin > Customer Domains**.
2. In the **Setup | Customer Domains** page, choose a customer and click **Edit**.
3. Update the information required for the following fields:

Field	Descriptions
Customer Name	Drop-down menu of customers added to the system.
Domain	Domain address for the customer. **NOTE:** In order to use the Assets Map within Analytics, you must email the name of your customer domain to realaccess@polycom.com. To use the Assets Map, you must also allow Internet access from your RealAccess, On-Premises Edition service delivery platform.
SSO	Enable the check box if your users will log in with Single Sign-On credentials, and clear the check box if they will not**.** If you check this box, you must also configure SSO on the **Client Config | SSO Configuration** page.

4. Click **Update**.

Delete a Customer Domain

You can delete a customer domain from your RealAccess platform.

To delete a customer domain:

1. Click **Admin** in the lower navigation bar to launch the Admin page and go to **System Admin > Customer Domains**.
2. In the **Setup | Customer Domains** page, choose a customer and click **Delete**.

Managing User Accounts

The RealAccess platform automatically adds users if you chose to use Single Sign-on (SSO) for user access. If, instead, you added a customer domain, users can add themselves to the platform with their email addresses. If you chose *neither* of the previous two options for user access, you must manually add users.

When you add users manually, you must assign them a role, which determines what tasks they have permissions to perform within the platform. Users who are automatically added to the platform or who add themselves are automatically given permission only to view training videos. However, you can change the permissions for these automatically-added users later.

You can assign the following roles to users.

RealAccess User Roles

Role	Available Functions/Menus	Notes
Admin	Analytics, Admin, Support, Assets, Meetings, Utilization, Performance, Capacity.	Access to administration 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	Videos.	Can view endpoint training videos only.

Add a User Account

Add users to the RealAccess platform so they can view endpoint training videos or, in some cases, perform administrative tasks on the platform.

If your platform uses SSO, you cannot add users.

To add a user account:

1 Click **Admin** in the lower navigation bar to launch the Admin page and go to **Client Config > Users**.

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

3 Add the information required for the following fields:

Field	Description
First Name	First name of the user.
Last Name	Last name of the user.
Email	The user's email address. The domain in this address must match *exactly* a customer domain as defined in the **Customer Domains** page. The domain is case sensitive.
Role	The level of permissions for the user.
Time Zone ID	The time zone of the user. Events will be reported with the time of this time zone.

4 Click **Update**.

5 Click **Reset Password** to send the user an email, which allows the user to set a password and log into the RealAccess platform.

Edit a User Account

Edit a user account to update user information or change the user's permissions on the RealAccess platform.

To edit a user account:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Users**.
2. In the **Setup | Users Setup** page, choose a user and click **Edit**.
3. Update the information required for the following fields:

Field	Description
First Name	First name of the user.
Last Name	Last name of the user.
Email	The user's email address. The domain in this address must match *exactly* a customer domain as defined in the **Customer Domains** page. The domain is case sensitive.
Role	The level of permissions for the user.
Time Zone ID	The time zone of the user. Events will be reported with the time of this time zone.

4. Click **Update**.
5. If you changed the email address, click **Reset Password** to send the user an email, which allows the user to set a password and log into the RealAccess platform with the new address.

Reset a Password

You can send a password reset email to a user who needs to reset a password.

To reset a password:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > 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 platform.

To delete a user account:

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

System Configuration

You can configure the RealAccess, On-Premises service delivery platform to do any or all of the following:

- Account for changes or additions to your RealPresence DMA system or RealPresence Resource Manager system.
- Enable or disable cron jobs.
- Configure messages you and your users receive when performance thresholds are exceeded or errors occur.

Managing Your RealPresence Resource Manager System and RealPresence DMA System

Your initial RealPresence DMA system and RealPresence Resource Manager system are configured as part of your system deployment, but you can update the product information or add new systems on the **Agent** page. Connecting with more than one RealPresence DMA system or RealPresence Resource Manager system can add reliability to RealAccess monitoring because if the connection to one RealPresence DMA system is dropped, the RealAccess platform still can collect data from the other RealPresence DMA system.

If you have more than one RealPresence DMA system or RealPresence Resource Manager system administered in your RealAccess platform, the platform pulls data from all of the RealPresence DMA systems or RealPresence Resource Manager systems and eliminates any duplicate endpoint data.

Add a RealPresence DMA system or RealPresence Resource Manager System

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

To add a RealPresence DMA system or RealPresence Resource Manager system:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Agent**.

2 In the **Setup | Agent** page, choose one of the following:

- **Add a new DMA**
- **Add a new RPRM**

3 Add the information required for the following fields:

Field	Description
IP Address	The IP address of the server, either the RealPresence DMA system or RealPresence Resource Manager system. Use the virtual IP address if you are connecting to a redundant configuration.
User Name	The user name administered on the server for the RealAccess platform to use to connect. The user account must have a minimum of auditor and provisioning roles.
Password	The password the RealAccess platform should use to connect to the server.

4 Click **Update**.

Edit a RealPresence DMA System or RealPresence Resource Manager System

If the IP address of the RealPresence DMA system or RealPresence Resource Manager system changes or you have to use a different user name or password to connect to either resource, you must make the appropriate changes in your RealAccess platform.

To edit an infrastructure product:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Agent**.
2 In the **Setup | Agent** page, choose a product and click **Edit**.
3 Update the information in the appropriate fields.
4 Click **Update**.

Delete a RealPresence DMA System or RealPresence Resource Manager System

If have multiple RealPresence DMA systems or RealPresence Resource Manager systems and you no longer are using one, you should delete it. If you are replacing a RealPresence DMA system or RealPresence Resource Manager system, delete the one no longer in service. However, it is recommended that you add the new one *before* you delete the old one so that you do not lose any data.

To delete a RealPresence DMA System or RealPresence Resource Manager System

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Agent**.
2 In the **Setup | Agent** page, choose a product and click **Delete**.

Cron Jobs

The RealAccess, On-Premises Edition service delivery platform, by default, runs a number of cron jobs on a regular schedule. These cron jobs collect data from the RealPresence DMA system and Resource Manager to keep RealAccess Analytics and Asset Management up-to-date. The following cron jobs run:

- Conference Rooms
- RealPresence Resource Manager inventory
- RealPresence Resource Manager CDR Log
- RealPresence Collaboration Server (RMX) Query
- RealPresence DMA CDR Logs

If you need to change or stop a cron job, contact Polycom support.

Managing Notifications

Configure email notifications on the RealAccess platform to get timely alerts when there are problems with your collaboration network.

Configure Notification Email

Configure notification email settings so the RealAccess platform can use a mailbox on your company's email server to send notification email.

Your email administrator must also create a mailbox for the RealAccess platform on your company's email server.

To configure notification email:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **System Admin > Email configuration**.
2. In the **Setup | Email configuration** page, add the information required for the following fields:

Field	Description
"From" name	The sender name that is displayed for email from the RealAccess platform.
"From" address	The email address of the RealAccess platform.
Server host/IP	The host name or IP address of your company's email server.
Account username	The user name of the RealAccess platform's email account, as administered on your company's email server.

3. Click **Update**.

Configure a Connection Notification

Add email addresses that should receive an email when there are any changes to the connections from the RealAccess platform to the RealPresence platform.

To configure a connection notification:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Notifications**.

2 In the **Setup | Connections to RealAccess** section, click **Add Notification**.

3 In the **Email** field, add an email address that should receive connection notifications.

4 Click **Update**.

Configure an MCU Capacity Notification

Define MCU capacity thresholds, as a percentage of ports in use, that will generate notifications, and specify email addresses that should receive those notifications.

To configure an MCU capacity notification:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Notifications**.

2 In the **Setup | MCU Capacity** section, click **Add Notification**.

3 In the **Email** field,.add an email address to receive the notification.

4 In the **Audio Percent** field, use the up and down arrows to adjust the percentage of the audio-ports-in-use threshold.

5 In the **Video Percent** field, use the up and down arrows to adjust the percentage of the video-ports-in-use threshold.

6 In the **MCUs** drop-down list, select the MCU to which the threshold should apply.

7 Click **Update**.

Configure an Error Notification

Define text strings that may appear in error messages and that will then generate notifications. Also, specify which email addresses should receive those notifications.

To configure an error notification:

1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Notifications**.

2 In the **Setup | Errors** section, click **Add Notification**.

3 In the **Email** field, add an email address to receive the notification.

4 In the **Wildcard** field., add a string of character(s) that, when included in an error message, will generate a notification.

If the characters you enter appear in an error message, a notification is sent regardless of what characters in the error message precede or follow the character string you specified.

5 Click **Update**.

System Maintenance

The RealAccess, On-Premises Edition service delivery platform helps you maintain your platform with the following capabilities:

- Back up and restore
- Manual retrieval of your complete endpoint inventory

Backing Up and Upgrading Software

You can back up and upgrade your RealAccess, On-Premises Edition service delivery platform software from the RealAccess platform.

Backing Up Software

Data backups are key to any recovery strategy, and the RealAccess, On-Premises Edition service delivery platform aggregates data and automatically backs it up. The Database (SQL) server is backed up daily and stored locally on a isolated partition (E:\mssql\backups) on the database instance. The Database server backup consists of two files:

- Configuration data (jokakiaviper01)
- User data (phoenix)

You do not need to back up the Utility server or the Web server through the RealAccess platform. However, you should back up the two files on the E:\ drive through your virtualization environment console.

Upgrade RealAccess, On-Premises Edition Utility and Web Servers

To upgrade the RealAccess, On-Premises Edition service delivery platform to a newer software version, you must upgrade the Utility server, the Web server, or both instances running in your virtualization environment. You do not need to manually upgrade your Database (SQL) server, as the Web server upgrades the database to the newest version when upgrading.

Depending on your virtualization environment, you might need to remove the instances before installing the upgrade instances.

Consult your virtualization administrators before removing instances.

To upgrade the RealAccess, On-Premises Edition servers:

1. Download the new upgrade instances from the Polycom download site.
2. Power down the Utility server and Web server instance(s) that you are upgrading. DO NOT power down the database server.

3. Deploy the new instances in the following order in your virtual environment, omitting any that you are not upgrading:
    - Utility server
    - Web server
4. Power up the new instances.
5. Configure each instance that you are upgrading. For configuration procedures, see the *Polycom RealAccess, On-Premises Edition Deployment Guide*.

View Database Upgrade Information

The **Database Upgrade** page displays a list of database migrations. For example, if version n was upgraded to n+1, the list shows when the database upgrade scripts ran.

To view the database upgrade information:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **System Admin > Database Upgrade**.
2. Click the blue icon in the upper-right corner of the column that you want to search, set the search parameters, and click **Filter**.
3. Click the column headers to sort the list using your selected options.

Manually Retrieve Your Complete Endpoint Inventory

Every 24 hours, the RealAccess platform automatically retrieves the complete endpoint inventory from your RealPresence Resource Manager system. However, if you don't want to wait for the automatic retrieval, you can run the retrieval manually. This capability is useful if you just completed installation of your RealAccess platform and want to collect endpoint data immediately. As another example, if your company adds endpoints, you might want to capture those endpoints in the RealAccess platform on that same day, rather than waiting for tomorrow.

To manually retrieve a complete inventory:

1. Click **Support** in the lower navigation bar to launch the Support page and go to **Status.**
2. Click **Request RM Inventory**.

   The RealAccess platform begins pulling the asset inventory from RealPresence Resource Manager system.
3. Check your **Asset Management List View Report** to see if the endpoints you expect to see have been retrieved.

Troubleshooting RealAccess Connections

The Polycom® RealAccess, On-Premises service delivery platform provides troubleshooting tools to help you do the following:

- Check connections between the RealAccess service delivery platform itself and the collaboration network.
- Retrieve CDR data that might have been lost due to a connection failure.

Using RealAccess Logs

The RealAccess, On-Premises service delivery platform generates two logs, the **Application Log** and **Utility Log**, to track its activity throughout the day. You can review these logs on-line for monitoring or troubleshooting purposes and save each log to a Excel spreadsheet to keep for historical purposes or send to Polycom Support for troubleshooting.

View the Application Log

The Application Log contains messages about, and generated by, the Web server.

To view the Application Log:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Log Export**.
2. For the **RealAccess Application Logs** list, click the calendar icon to **Select a day to export**.

   The log for the day you select appears.

Customize the Log and Save it to a File

You might need to send the Application Log to Polycom Support for troubleshooting. To do this, you must first customize the log and save it to a file.

To customize the log and save it to a file:

1. Click **Edit Columns**.
2. Select *all* check boxes.
3. Click **Export**.

   An Excel file is automatically downloaded to the Download folder on your computer.
4. Email the Excel file to Polycom Support, as necessary.

View the Utility Log

The Utility Log contains messages about, and generated by, the Utility server.

To view the Utility Log:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Log Export**.
2. For the **RealAccess Utility Logs** list, click the calendar icon to **Select a day to export**.

   The log for the day you select appears.

Customize the Log and Save it to a File

You might need to send the Application Log to Polycom Support for troubleshooting. To do this, you must first customize the log and save it to a file.

To customize the log and save it to a file:

1. Click **Edit Columns**.
2. Select *all* check boxes.
3. Click **Export**.

   An Excel file is automatically downloaded to the Download folder on your computer.
4. Email the Excel file to Polycom Support, as necessary.

Recover CDR Data

In case of a network or service outage, you can recover CDR data for the period in which the outage occurred.

To recover CDR data:

1. Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **System Admin > Re-Request**.
2. In the **Setup | Re-Request** page, select the information required for the following fields:
   - **Select Partner**
   - **Select Client**
3. Select an IP address from the list, either for the RealPresence DMA system or the RealPresence Resource Manager system.
4. In the **Select Type** field, select the type of data you want from the selected resource IP address.
   - For the RealPresence DMA system, choose **MCU** to download performance of ports and bridges or choose **CDR** to download data related to calls, including endpoints, call duration, dial strings, and so on.
   - For the RealPresence Resource Manager system, choose **Inventory** to download the list of assets or choose **Billing** to download network performance data.
5. In the **Start Date** and **End Date** fields, click the calendar icon to specify the range of days of data.

6 Click **Submit**.

The job is submitted to the system queue and runs according to its priority. Depending on the amount of data requested, data updates can take anywhere from five minutes to four hours.

7 Access several pages under the **Analytics** tab, and verify that the refreshed data that appears is reliable.

Check Connections to the RealPresence DMA System and RealPresence Resource Manager System

If your RealAccess platform is not displaying data, you can manually check the RealAccess platform connections to the RealPresence DMA system and RealPresence Resource Manager system.

To check connections to the RealPresence DMA system and RealPresence Resource Manager system:

1 Click **Support** in the lower navigation bar to launch the **Support** page and go to **Status**.

2 Click **Test All Connections**.

The connection tests begin to run. The test takes a long time to complete.

3 Wait until the processing bar stops running.

When the test is complete, the Status page displays the following results:

- In Section 1, the **Results** column for the RealPresence DMA system and RealPresence Resource Manager system shows one of the following statuses:
  - **Active** — The connection is up and running.
  - **Inactive** — The connection has failed.
- In Section 2, the Active column for the CDR, inventory, and MCU utilization data collection shows one of the following statuses:
  - **Active**
  - **Inactive**
- In **API Status Change Logs** section, you can check the more specific API activity that has been occurring and when the last data capture occurred.
- In **Job Errors**, you can check the API errors that may have occurred. Continual errors would indicate a problem. Sparsely reported errors typically do not affect data, since the API data retrieval occurs every 5 minutes.
- In **TraceRoute Output**, the TraceRoute Output shows results of the Traceroute that was run when you last ran the **Test All Connections test**.

Troubleshooting Inactive Connections

Troubleshoot any inactive connections you find when you run the Test All Connections test.

Troubleshoot Connections to the RealPresence DMA system and RealPresence Resource Manager system

If you find an inactive connection to your RealPresence DMA system or RealPresence Resource Manager system or inactive connections with API retrievals, troubleshoot the connections.

1. Ping the RealAccess agent from the RealPresence DMA system or RealPresence Resource Manager system, whichever is inactive, to check the TCP connection.
2. If the ping was unsuccessful, you might have network problems or a problem with the account established on the RealPresence DMA system or RealPresence Resource Manager system.
3. If the ping was successful, tell IT to check that TCP ports 8443 and 2341 are open in both directions between the RealAccess agent and the RealPresence DMA system or RealPresence Resource Manager system.

Troubleshoot API connections

If you find an inactive API process, troubleshoot the connections.

1. Log into your REST API client using RealAccess credentials:
2. For the RealPresence DMA system, run the following command using the IP address for your RealPresence DMA system:

   ```
   GET https://<DMA_IP_Address>:8443/api/rest/status
   ```

   A **204** response means the command was successfully received.

   A **403** response means the RealAccess platform does not have permission to access the RealPresence DMA system.
3. Check that the RealAccess platform user account on the RealPresence DMA system has auditor privileges or higher.
4. For the RealPresence Resource Manager system, enter and run the following command using the IP address for your RealPresence Resource Manager system:

   ```
   GET https://<Resource_Manager_IP_Address>:8443/api/rest/devices/export-inventory
   ```
5. Rerun **Test All Connections**.
6. If the connection still fails, reboot the RealAccess Web Server.

   If problems still persist, contact Polycom Services.