OPERATIONS GUIDE Release 2.0 | October 2016 | 3725-50208-001A

Polycom® RealAccess™

On-Premises Edition

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Polycom® RealAccess™, On-Premises Edition Overview

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

This Operations Guide is primarily for two user audiences:

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

What is Polycom RealAccess?

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

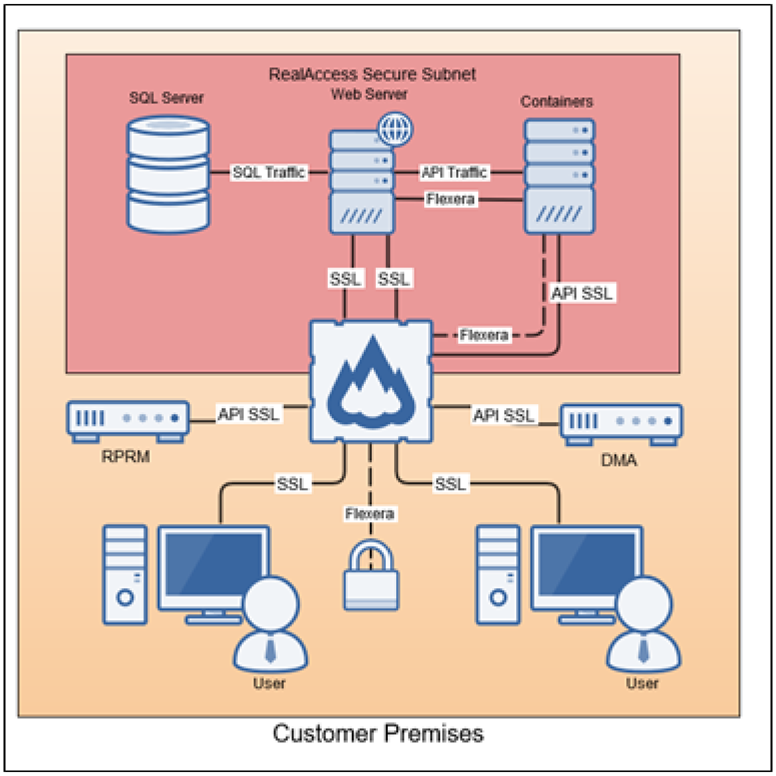
The RealAccess service delivery platform helps you reduce the workload of your IT organization, empower end users, track performance and quality of service, and provide evidence-based decision making for future expansions.

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

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

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

RealAccess, On-Premises Edition service delivery platform overview



Asset Management and Comprehensive Analytics

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

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

Secure Monitoring and Management

The RealAccess, On-Premises Edition service delivery platform simplifies the process of monitoring your infrastructure platform, making information available when and as needed. The RealAccess, On-Premises Edition brings the RealAccess service delivery platform to customers who cannot use the Cloud Edition because of their organization's compliance, governance, or security policies. For example, the RealAccess Agent cannot access the Internet, and some RealAccess, On-Premises Edition features have additional security measures designed to protect customer data.

Customers who use the RealAccess, On-Premises Edition must ensure that it is never accessible to the Internet.

Portal Dashboard Overview

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

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

Analytics

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

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

Analytics Feature Descriptions

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

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

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

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

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

Administration

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

Administration Functions Descriptions

Function	Description
Agent	Technical information from your Polycom® RealPresence® DMA® and Polycom® RealPresence® Resource Manager systems used to create and download the RealAccess portal agent: • IP address • User name • Password
Asset Management	Merge endpoints together, especially when endpoints are imported before serial numbers were assigned in the RealPresence Resource Manager system
Call Log Type Rules	Create and configure CDR call type rules and options
Cron Jobs	Schedule and manage CDR lookups, MCU status requests, and inventory downloads
Customers	Record basic customer information including primary and secondary contacts
Customer Domains	Add domains to the system to allow users to sign up and log in
Database Upgrade	Display a list of database migrations
Email Configuration	Configure the outgoing email notification parameters
Log Export	Displays the RealAccess application and utility logs
MCU Friendly Name	Assign a more recognizable name to your MCU
Notifications	Alert users to data lookup failures or excessive usage thresholds
PFX Certificate	The single, encryptable PFX file stores the following information: • Server certificate • Any intermediate certificates • Private key
Re-Request	Download CDR logs on demand for a specific time period for data recovery in an outage
Site Friendly Name	Assign a more recognizable name to your site
Software Version Friendly Name	Assign a more recognizable name to your software versions
SSO Configuration	Allows users to log in to the RealAccess service delivery platform using their enterprise credentials (if enabled)
Users	Create, edit, and assign roles to users

Support

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

Support Functions Descriptions

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

Working in the RealAccess Service Delivery Platform

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

Log In to the System

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

To log in to the RealAccess service delivery platform:

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

Update Your User Profile

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

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

To update your personal profile:

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

- **User Photo**

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

View Tutorial Videos

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

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

To view tutorial videos:

1. Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Tutorial Library > <Endpoint Type>**.
2. One the landing page for the endpoint type you selected, click on a video to play it in your browser.

RealAccess Service Delivery Platform Analytics

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

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

Meeting Summaries

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

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

The **Executive Summary** page provides graphs that detail the various details for your organization over a specific time period. Filter the information by **Number of Meetings** or **Hours of Meetings** and then by duration of calls: **All Calls**, **Calls under 5 minutes**, or **Calls over 5 minutes**.

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

Utilization

The **Utilization** tab has the following pages to help you see how your network is being used.

Summary Information

Get an overview of your network's usage with comprehensive call data on the **Summary** page. You can review the following information:

- See the total, duration, and maximum number of calls in the summary widget.
- Compare different aspects of your network (locations, endpoint system types, and more) with the Highlights and Trends menus.

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

The **Utilization | Summary** page helps you answer questions like “How many calls were placed last week?” You can view this information at the top of the page with the summary widget.

The summary widget also shows you average and maximum values using past data from the specified period of analysis. (Note: Red numbers indicate below-average values.)

Trends

View and export detailed information about how calls are made in your network over a specific time period. Filter the information by **Call Type**, **System Type**, and **Model** to see when your network experiences peak activity.

The **List View** section below the graph provides specific details about each call: duration, source, packet loss, and more.

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

Monthly Usage

View month-by-month endpoint usage for the locations in your network. You can filter the Monthly report by site and year.

You can also compare the audio and video call durations by month.

List View

View a detailed list of how devices registered to your RealPresence Resource Manager are being used over a specific time period. With no filters for the **System Type** option, the list shows all registered devices. You can filter the list to narrow it and show specific types of devices:

- **Audio devices**
- **Content**
- **Desktop**
- **Immersive**
- **MCU**
- **Mobile**

You can also create a detailed report by clicking the **Export** button, which automatically downloads a formatted spreadsheet file.

Endpoint Dashboard

Get details about a specific endpoint in your network (except Microsoft Lync and RealPresence Web Suite). Somewhat similar to the **Utilization | Summary** page, this page includes a variety of analytics and tools, including:

- The **Endpoint Dashboard** widget that lists your top call destinations
- Data pertaining to monthly duration, trends, success rate, and performance based on the endpoint and time period you choose
- Printing a PDF of your summary reports

Conference Utilization

The **Conference Utilization** page displays conference call details by minutes and number of participants.

Adjust the **Period of Analysis**, **Select** the VMR options, and filter by **Conference Type** to refine the **Conference Utilization | Trends** report.

The **List View** section below the graph provides specific details about each conference: start time, type, user and room IDs, duration, participant count, and more.

Performance

The **Performance** tab has pages to help you identify and understand errors in your network.

Summary Information

Get an overview of errors that occur in your network. Functioning much the same way as the **Utilization | Summary** page, there are a variety of menus to help you recognize how and where errors happen.

The summary widget allows you to see the number of errors and what types of errors have occurred over a specific time period. You can filter errors that occurred at the **Source**, **Destination**, or both. This page also has menus with other specific error information, such as the number of errors for each site and call success rate of endpoint types.

You can also print a PDF of your summary reports.

Trends

View calls in your network that failed over a specific time period. Functioning much the same way as the **Utilization | Trends** page, you can filter the information by **Call Type**, **System Type**, **Model**, and more.

The **List View** section below the graph provides specific details about each error: severity level, date, system type, reason for the error, and more.

Network Summaries

The Network | Summary page displays the highest number of calls impacted by packet loss, the most impacted sites, and an overall network score.

Mouse-over the green and red **Network Score** percentages:

- **Green**: clean calls (unaffected by packet loss) divided by total calls
- **Red**: impacted calls divided by total calls

View detailed information about how calls are made in your network over a specific time period. Filter the information by **Call Type**, **System Type**, and **Model** to see when your network experiences peak activity.

The **List View** section below the graph provides specific details about your network: name, site, packet loss, and more.

Capacity

The **Capacity** tab has a page with tools for helping you understand how your RealPresence Collaboration Server (RMX) multipoint control unit (MCU) is being used.

RMX Capacity

View hourly and daily usage or a capacity summary of video and audio on your MCU. You can also filter by utilization percentage or number of ports.

The **RMX Capacity | Utilization** pages help you:

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

The **Hourly Utilization** graph lets you know when your MCU experiences peak utilization throughout the day. When capacity is near a particular threshold, you receive a notification email. Similarly, the **Daily Utilization** graph lets you compare day-to-day MCU peak utilization. The **Summary** graph helps you compare Total HD Ports, Audio Ports and Total Video Ports (HD or CIF) usage by MCU.

Concurrent Connections

The **Concurrent Connections** page summarizes the number of concurrent connections by system type over a specified time period.

The preceding summary example shows a 30-day analysis period, longer than the default setting (Last Week), which shows cyclical usage trends contrasting weekday and weekend utilization.

View a detailed list of how registered devices are being used over a specific time period. With no filters for the **System Type** option, the list shows all registered devices. You can filter the list to narrow it and show specific types of devices:

- **Audio devices**
- **Content**
- **Desktop**
- **Immersive**
- **MCU**
- **Mobile**

The **List View** section below the graph provides specific details about your connections: issue serverity, start, duration, source, and more.

RealAccess Service Delivery Platform Asset Metrics and Management

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

Endpoint Asset Metrics

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

View Endpoint Asset Inventory

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

To manage your asset inventory list:

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

Manage Endpoint Metrics by Location

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

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

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

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

To view endpoint information by location:

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

   The list of locations with active systems displays in the **Systems by site** widget.
3. Choose the following options, depending on the level of information you want to view:
   a. To view endpoint types at a specific location, click the site name in the **Systems by site** widget.

      The list of endpoint types at that location displays in the **Active in <Location> by type** widget.
   b. To view endpoint models of a specific type, click the endpoint type in the **Active in <Location> by type** widget.

      The list of endpoint models of that type displays in the **Active <Type> in <Location>** widget.
   c. To view the software versions a specific endpoint model are running, click the endpoint model in the **Active <Type> in <Location>** widget.

      The list of software versions running on those endpoint models displays in the **Software Release** widget and the latest software version available for that endpoint model displays in the **Latest Polycom Software Release** field.
   d. Click the specific software version to view the endpoints running that software version.

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

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

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

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

Manage Endpoint Metrics by Type

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

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

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

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

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

To view endpoint information by type:

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

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

The list of endpoint types displays in the **Active systems by type** widget.

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

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

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

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

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

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

The locations running that specific software version displays in the **Site** widget.

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

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

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

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

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

Endpoint Asset Management

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

View Asset Entitlement Information

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

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

- Active assets missing from Siebel
- Active assets

To manage your asset entitlement lists:

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

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

- **Active Assets missing from Siebel:**

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

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

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

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

Assigning Endpoints to Departments

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

Create a Department

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

To create a Department:

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

Assign an Endpoint to a Department

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

To assign an endpoint to a Department:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.
2. In the **Endpoint Grid** list, locate the endpoint you want to assign to a Department and click **Edit**.

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

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

Merge Endpoints in a Department

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

To merge endpoints in a Department:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.
2. In the **Endpoint Grid** list, locate the endpoints assigned to a single department that you want to merge and enable the check box for each.
3. Click **Merge endpoints**.

Update System Information for Asset Reporting

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

To update system information to manage asset reporting:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.
2. In the **Endpoint Grid** list, locate the endpoint you want to update and click **Edit**.

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

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

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

4 Click **Update**.

RealAccess Service Delivery Platform Administration

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

- Admin
- Customer Admin

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

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

Managing 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 Administrator dashboard and go to **Setup > Customers**.

2 In the **Setup | Customers** widget, choose a customer and click **Edit**.

3 Update the information required for the following fields:

- **Customer Information**
  - **Customer Name**
  - **SOA**
  - **Customer PO** (required)
  - **Partner**
  - **Admin Email**
  - **Show failed logins** (check box)
- **Primary Contact** and **Secondary Contact**
  - **First Name**

- **Last Name**
- **Email**
- **Title**
- **Telephone**

4 Click **Update**.

Add a Customer Domain

You can add a customer to your RealAccess service deployment platform, which allows users to sign up and log in to the service.

To add a customer domain:

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

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

3 Add the information required for the following fields:

- **Customer Name** Drop-down menu of customers added to the system
- **Domain** Domain address for the customer
- **SSO** Enable check box for **true**, clear check box for **false**

4 Click **Update**.

Edit a Customer Domain

You can edit a customer domain to update the customer information and options.

To edit a customer domain:

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

2 In the **Setup | Customer Domains** widget, choose a customer and click **Edit**.

3 Update the information required for the following fields:

- **Customer Name** Drop-down menu of customers added to the system
- **Domain** Domain address for the customer
- **SSO** Enable check box for **true**, clear check box for **false**

4 Click **Update**.

Delete a Customer Domain

You can delete a customer domain from your RealAccess service delivery platform.

To delete a customer domain:

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

2 In the **Setup | Customer Domains** widget, choose a customer and click **Delete**.

Managing User Accounts

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

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

RealAccess User Roles

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

Add a User Account

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

To add a user account:

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

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

3 Add the information required for the following fields:

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

4 Click **Update**.

Edit a User Account

You can edit a user account to update user information.

To edit a user account:

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

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

3 Update the information required for the following fields:

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

4 Click **Update**.

Reset a Password

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

To reset a password:

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

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

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

Delete a User Account

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

To delete a user account:

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

2 In the **Setup | Users Setup** widget, choose a user and click **Delete**.

Configure Single Sign-on (SSO)

The **SSO Configuration** page enables users to log in to the RealAccess service delivery platform portal with their enterprise credentials (SAML 2.0 supported).

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 Administrator dashboard and go to **Setup > SSO Configuration**.

2 In the **Setup | SSO Configuration** widget, configure the fields in the following table. The field values for this configuration are dependent upon your RealAccess On-Premises configuration and your Single Sign-On Service configuration (SSO administrator assistance is required).

SSO Configuration Field Descriptions and Examples

Field	Description	Example
Site URI	URL to RealAccess Single Sign-On Service (Viper)	Example: https://raop.company.com:444
Metadata GUID	Metadata URL for the service. RealAccess uses this GUID in 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	URL to RealAccess	Example: https://raop.copmany.com
IDP Location	URL to Single Sign-On (SSO) metadata	Example: https://asfs.company.com/FederationMetadata/2007-06/FederationMetadata.xml
X509 Signing Key	The x509 signing key from the metadata	Example: MIICdACjBgj5LIgdTvZEEtTwhFQJ0A0mihfF6VZPouUxOtC jbSefieTLdjt3jT5Wqli5CeNv5kxdtB07P8XRJE92vfB0XM1W AWCaFGVYjSsi2FSacUV4UxbIejSnz9ADgmixz2BKrhjmLI 2ARLueHDbi7KolDEJVZ1IsVpQ4sIoyCKPW98LZqT6BDXy 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
X509 Encryption Key	The x509 encrypting key from the metadata	Example: MIICdACjBgj5LIgdTvZEEtTwhFQJ0A0mihfF6VZPouUxOtC jbSefieTLdjt3jT5Wqli5CeNv5kxdtB07P8XRJE92vfB0XM1W AWCaFGVYjSsi2FSacUV4UxbIejSnz9ADgmixz2BKrhjmLI 2ARLueHDbi7KolDEJVZ1IsVpQ4sIoyCKPW98LZqT6BDXy eziPed0b96dZqXe6q8z6tmDrADMmw4kxqdDDx7xNvsWsZ AUNNhDULhPWepVvMSwt6n9Jav7WqZUryPd7Gt45NJYz 4dYGog57L3IGlvKOndVxCNw9tI2EZAfElBJZj6bdyk1R5nK 8OB4qPWZMtz2dQau5YcPBLVskWNtHZqHVj7Guyl9lH9e 0UuUgs06iNbbrkwTGiHKNQ7BB6Da1MEwdWwUvEzL4x0 6mFOpqBbiiIrtGUANC2BWUKwBjqFGunaOXGVF2KJ1gC TxpMdJK5v5jJU6WVxfS9wb3bcDXfWjFhgi25tCnf3blHDu0 ZvW4Uvgto8BuVCIOhKD60gj6CFOH7HVKqyMOojsw3Cqn eVFYvWUHx3oPVnB0FwjxcKwZF6CJ1rLz6ZzHzmFhV8qq wH3OfOGKnxVd54hgtfo3BvG4qlvneXYPuKkGs9PzoSFs0 As7iCHVaXoGObBdp54qfwHEQfQENDcl7o3TPKMqvU7ij WXvnuG6A9iYsJWK7nJi9V4IY1X4Q7mC5AxDteyIGf3Z9i8 ujspPRyvSm9IFaiXbOHzhIZEyDcXrPVgMExYcq5GI5mXP Js8mfbri9N6q7eVT5YUto8TDbAw29GgIHUWH7Dzgv2xQi ZMINy39daF5HBB2IPwlhR8a6IeoRfcgvnXkjA8PZUgGMmf JIN3dysDuwosDDGBbjkeAr7Gos10cUgCWN4dFBEt9eLZf VKGhOYDa7z8NWSkXAGTydVZsm3gKqrMBf3Mld5iJ10m Ol0zPHscAMXjRXCAEWyJel2XLhEvHOeu5htNsnefHx8or1 CkGR7O==
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**.

Managing Infrastructure Products

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

Add an Infrastructure Product

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

To add an infrastructure product:

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

2 In the **Setup | Agent** widget, choose one of the following products to add:
   - To add a new RealPresence DMA system, click **Add a new DMA**.
   - To add a new RealPresence Resource Manager system, click **Add a new RPRM**.

3 Add the information required for the following fields:
   - **IP Address**
   - **Username**
   - **Password**

4 Click **Update**.

Edit an Infrastructure Product

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

To edit an infrastructure product:

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

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

3 Update the information in the following fields:
   - **IP Address**
   - **Username**
   - **Password**

4 Click **Update**.

Delete an Infrastructure Product

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

To delete an infrastructure product:

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

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

Configuring Component Aliases

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

Configure an MCU Alias

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

To configure an MCU alias:

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

Configure a Site Alias

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

To configure a site alias:

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

Configure a Software Version Alias

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

To configure a software version alias:

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

Managing Notifications

The **Notifications** page contains options to configure notifications and alerts for connection changes to the RealAccess service delivery platform, MCU capacity threshold alerts, and specified error values. You can set up the email account information on the **Email configuration** page.

Configure Notification Email Settings

The **Email configuration** page enables you to configure the originating email notification parameters.

To configure RealAccess email:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Email configuration**.
2. In the **Setup | Email configuration** widget, add the information required for the following fields:
   - **“From” name**
   - **“From” address**
   - **Server host/IP**
   - **Account username**
   - **Account password**
3. Click **Update**.

Configure a Connection Notification

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

To configure a connection notification:

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

Configure an MCU Capacity Notification

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

To configure an MCU capacity notification:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Notifications**.
2. In the **Setup | MCU Capacity** widget, click **Add Notification**.
3. Update the information in the following fields:

- Add the email address for the connection notification delivery in the **Email** field.
- Use the up and down arrows to adjust the **Audio Percent** threshold.
- Use the up and down arrows to adjust the **Video Percent** threshold.
- Select the MCU from the **MCUs** drop-down list.

4 Click **Update**.

Configure an Error Notification

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

To configure an MCU capacity notification:

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

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

3 Update the information in the following fields:

- Add the email address for the connection notification delivery in the **Email** field.
- Add the wildcard character(s) in the **Wildcard** field.

4 Click **Update**.

Managing Call Type Rules

You can configure the CDR call type rules in the **Call Log Type Rules** page of the RealAccess, On-Premises Edition service delivery platform.

Add a Call Type Rule

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

To add a call type rule:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Call Log Type Rules**.

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

3 Add the information required for the following fields:

- **BitrateExpression**
- **SourceExpression**
- **Call Type Format Rules**

  Note: 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.

To edit a call type rule:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Call Log Type Rules**.

2 In the **Setup | CDR Call Types** widget, 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 service delivery platform.

To delete a call type rule:

1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Call Log Type Rules**.

2 In the **Setup | CDR Call Types** widget, choose a rule and click **Delete**.

Configure Cron Jobs

The **Cron Jobs** page is used to schedule and manage jobs run by the RealAccess, On-Premises Edition service delivery platform. You can configure the following cron jobs:

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

To enable or disable a cron job:

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

2 In the **Setup | Cron Jobs** widget, choose a job and click **Edit**.

3 Do one of the following:

  - To enable the cron job, enable the check box.
  - To disable the cron job, clear the check box.

4 Click **Update**.

Upload a Certificate

The RealAccess service delivery platform stores the server certificate, any intermediate certificates, and the private key in one encryptable PKCS#12, or PFX file.

To upload the PFX certificate file:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > PFX Certificate**.
2. In the **Setup | PFX Certificate Upload** widget, click **Upload PFX Certificate**.
3. Navigate to the PFX file and click **Open**.
4. Click **Submit**.

Log Files

You can export or download application, utility, and CDR logs on the RealAccess service delivery platform.

Export Application Logs

The **Log Export** page displays the RealAccess service deliver platform application logs that have been routinely saved while the system runs.

To export the RealAccess application logs:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Log Export**.
2. In the **RealAccess Application Logs** list of the **Setup | Log Export** widget, click the calendar icon to **Select a day to export**.
3. On the logs list, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Machine Name**
   - **Site Name**
   - **Logged**
   - **Level**
   - **Message**
   - **Port**
4. Click the column headers to sort the list using your selected options.
5. Click **Export** to download a formatted spreadsheet report to your system.

Export Utility Logs

The **Log Export** page displays the RealAccess service deliver platform utility logs that have been routinely saved while the system runs.

To export the RealAccess utility logs:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Log Export**.
2. In the **RealAccess Utility Logs** list of the **Setup | Log Export** widget, click the calendar icon to **Select a day to export**.
3. On the logs list, click **Edit Columns** and choose the options you want to display in your grid. The following options are enabled by default:
   - **Received Time**
   - **Address**
   - **Local Time**
   - **Facility**
   - **Message**
4. Click the column headers to sort the list using your selected options.
5. Click **Export** to download a formatted spreadsheet report to your system.

Download CDR Logs

The **Re-Request** page provides a way to download CDR logs for a specified time period. In case of a network or service outage, you can recover CDR data for the recovery period.

To download CDR logs:

1. Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Re-Request**.
2. In the **Setup | Re-Request** widget, add the information required for the following fields:
   - **Select Partner**
   - **Select Client**
   - **Select Type**
   - **Start Date** and **End Date** (click the calendar icon to select the date)
3. Click **Submit**.

   The job is submitted to the system queue and runs according to its priority. Depending on the amount of data requested, this can take anywhere from five minutes to four hours.
4. Verify that the refreshed information that displays on your screen is reliable.

Backing Up and Upgrading Software

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

Backing Up RealAccess, On-Premise Edition 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 service delivery platform portal. 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 Administrator dashboard and go to **Setup > 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.