



GETTING STARTED GUIDE

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RealPresence[®] Platform Director[™]



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About This Guide

This Getting Started Guide provides the information you need to set up and configure a Polycom RealPresence® Platform Director™ system for the first time. After you have set up the system as described in this Guide, see the *Polycom RealPresence Administrator Guide* for instructions on how to add RealPresence component products to your RealPresence Platform Director system for licensing and monitoring.

Help and Technical Support

Help and technical support for the RealPresence Platform Director is available at the Polycom Support Center. The following sections provide links for service and specific products and their documentation.

Software Downloads

For software downloads, product documentation, product licenses, troubleshooting tips, service requests, and more, visit the [RealPresence Platform Director](#) support site.

Reference Documentation

The following support and reference documentation is available on the [RealPresence Platform Director](#) support site:

- *RealPresence® Platform Director Software 1.8 Release Notes*
- *RealPresence® Platform Director Software 1.8 Administrators' Guide*
- *RealPresence® Platform Director Software 1.8 Getting Started Guide*

For details on each of the RealPresence Platform products that can be used with the RealPresence Platform Director, visit the [Polycom support](#) web site for links to information and downloads for each of the following products.

- Polycom® RealPresence® DMA® 7000
- Polycom® RealPresence® Resource Manager
- Polycom® RealPresence® Access Director™
- Polycom® RealPresence® Collaboration Server
- Polycom® RealPresence® CloudAXIS Suite (Services Portal and Experience Portal)

For details on all Polycom® RealPresence® CloudAXIS™ Suite products, visit http://support.polycom.com/PolycomService/support/us/support/network/cloudaxis_suite/realpresence_cloudaxis_suite.html.

You can find Request for Comments (RFC) documents by entering the RFC number at

- <http://www.ietf.org/rfc.html>.

VMware support and reference documentation is available at the following web address.

- <https://www.VMware.com/support/pubs/vsphere-esxi-vcenter-server-pubs.html> (and select documentation for Release 5.5, 5.1 or 5.0).
- <https://my.VMware.com/web/VMware>.

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Audience, Purpose and Required Skills

This *Getting Started Guide* is written for a technical audience with knowledge of virtual machine environments, security certificates, and other networking concepts. It assumes you are setting up a RealPresence Platform Director System for the first time.

Supported RealPresence Virtual Editions

The virtual editions of Polycom RealPresence Platform products supported with current and prior versions of RealPresence Platform Director are listed in the following table. Most earlier versions of RealPresence component products can be monitored within RealPresence Platform Director, although licensing is not supported in those earlier versions. SNMP must be enabled within each component product before RealPresence Platform Director can monitor those instances.

Supported Polycom RealPresence Virtual Editions

| <i>Product</i> | <i>Current Version</i> | <i>SNMP Monitoring</i> | <i>Licensing</i> | <i>Earlier Versions</i> | <i>SNMP Monitoring</i> |
|--|------------------------|------------------------|------------------|-------------------------|------------------------|
| DMA | 6.1–higher | Yes | Yes | 6.0–lower | Yes |
| RealPresence Resource Manager | 8.2–higher | Yes | Yes | 8.2–lower | Yes |
| RealPresence Access Director | 4.0–higher | Yes | Yes | 3.1–lower | Yes |
| RealPresence Collaboration Server | 8.4–higher | Yes | Yes | 8.3–lower | Yes |
| RealPresence CloudAXIS (Services and Experience Portals) | 1.6–higher | No | Yes | 1.5–lower | No |
| RealPresence Content Sharing Suite (CSS) | 1.3–higher | No | Yes | 1.2–lower | No |

Product Requirements

A system on which the RealPresence Platform Director is deployed must meet the requirements outlined in the Release Notes for the version of the *RealPresence Platform Director* that you are deploying. The Release Notes outline the latest hardware, software, network port, web browser, and virtual machine requirements for running the software in your virtual environment.

Setup Worksheet

Before you begin deploying the RealPresence Platform Director system for the first time, complete the following worksheet to help you configure the values for your system.

| <i>Field</i> | <i>My system values</i> | <i>Description</i> |
|--|-------------------------|--|
| Deploy the RealPresence Platform Director in your vCenter environment | | |
| IP Address (IPv4) | | Static, physical IP address for the RealPresence Platform Director system. |
| Network Mask | | Network mask to be used with the IP address assigned to the RealPresence Platform Director |
| Default Gateway | | Default gateway to be used with the IP address assigned to the RealPresence Platform Director |
| DNS server names | | DNS name of the DNS server on your network that will resolve the domain and other system names for the RealPresence Platform Director instance. |
| DNS server IP addresses | | IP address of the DNS server on your network that will resolve the domain and other system names for the RealPresence Platform Director instance. |
| Local hostname | | Hostname to identify the RealPresence Platform Director instance within your organization's root domain. The host name and root domain names together constitute the fully qualified domain name (FQDN) that allows users to access the instance and administrator console with a web browser. |
| Log in to the Polycom Licensing Center | | |
| URL for the Licensing Center | | Use the information that was sent to your organization in an email confirming the purchase and/or renewal of licenses for RealPresence Platform Director and other products. |
| Login ID and password for the Licensing Center | | |
| License Server ID | | Copy and paste the System Identifier number from the License Management page that appeared when you first logged in to the RealPresence Platform Director instance. |
| Alias | | A unique name for your license server, if you wish to assign one. |

| <i>Field</i> | <i>My system values</i> | <i>Description</i> |
|---|-------------------------|---|
| Site Name | | A descriptive name for your Polycom RealPresence license management site. |
| Configure the RealPresence Platform Director for Basic Operation | | |
| Provider Name | | A unique name for the VMware provider in your vCenter, if you are using it. |
| vCenter URL | | The URL for your vCenter server or VMware provider in the following format: <code>https://<IP address of data center>/sdk</code> In place of the IP address, you can also use the fully qualified domain name (FQDN) for the vCenter or VMware environment. |
| Username | | The name of the user that has full access rights to access the vCenter. See the appendix to the <i>RealPresence Platform Director Administrator Guide</i> for a detailed description of required vCenter access rights. |
| Password | | The password for the VMware user. |

Deploy RealPresence Platform Director in Your VMware Environment

The RealPresence Platform Director requires deployment in a data center equipped with VMware vCenter. After deployment, RealPresence Platform Director can be configured to manage, license, and monitor RealPresence Platform components.

The installation package is delivered as a VMware Open Virtual Appliance (*.OVA) file to be deployed in a VMware environment following deployment procedures. The instructions that follow outline the steps for a first-time setup of RealPresence Platform Director in a working vCenter.

VMware Requirements

You can deploy the RealPresence Platform Director Virtual Edition software using VMware vCenter or another VMware-compatible environment. If you are installing in a vCenter, before attempting to deploy RealPresence Platform Director, ensure that you have the correct permissions to instantiate the virtual instance within vCenter. Refer to appropriate VMware documentation for a description of the required permissions.

If you are deploying in another VMware-compatible environment, refer to the correct documentation for your VM infrastructure for how to deploy the RealPresence Platform Director *.OVA.



Note: VMware requirements

RealPresence Platform Director can be deployed with VMware vCenter or any EXSi host or cluster. vCenter is required for RealPresence Platform Director to deploy or monitor your Virtual Machine infrastructure.

Prepare for the Deployment

Complete the tasks outlined below to prepare to deploy the RealPresence Platform Director in your virtual data center environment.

- 1 Confirm that your system includes the prerequisites and meets the requirements listed in [RealPresence Platform Director Requirements](#).
- 2 Obtain the URL and login credentials for the Polycom Licensing Center. Both are contained in the email that Polycom sent to your organization to confirm the purchase of license entitlements for RealPresence Platform, Virtual Edition, RealPresence One, or RealPresence CloudAXIS products.
- 3 Obtain administrator login credentials to the vCenter environment where RealPresence Platform Director is being installed. Running the installation requires a user login that has permission to deploy *.OVA files.

For a vCenter installation, use an account role with permissions that allow RealPresence Platform Director to deploy and monitor virtual instances. See [the appendix to this document](#) regarding required vCenter permissions for more information on specific permissions required for RealPresence Platform Director to run in VMware vCenter.

- 4 Confirm that the required ports are available in your system. For a list of network ports used in a RealPresence Platform Director installation, see the appendix to the *RealPresence Platform Director Administrator Guide* outlining [port requirements](#).
- 5 Download the RealPresence Platform Director *.OVA file from the [Polycom Support web site](#), and note the location of the file on your network.
- 6 Allocate an IP address for the RealPresence Platform Director instance, and note the Network Mask and Default Gateway to be used with the address.
Although the RealPresence Platform Director can be used in a carefully configured DHCP environment that guarantees an unchanging IP address, Polycom recommends that you allocate and configure a static address for the instance.
- 7 Obtain the names and IP addresses of the DNS servers on your network that will resolve the domain and other system names for the RealPresence Platform Director instance.
- 8 Assign a local hostname to identify the RealPresence Platform Director instance within your organization's root domain. The host name and root domain names together constitute the fully qualified domain name (FQDN) that allows users to access the instance and administrator console with a web browser. Configure this FQDN on the appropriate DNS server or servers.

Deploy the RealPresence Platform Director Image in a vCenter

Use the standard VMware deployment procedure to deploy the RealPresence Platform Director *.OVA in your virtual data center. Deploy RealPresence Platform Director in vCenter if you have it; if you do not have vCenter, you can deploy the RealPresence products directly onto the EXSi host, using its console. The vCenter administrator interface guides you through the deployment process. If you are deploying on an EXSi host, consult the EXSi deployment instructions in the appropriate VMware documentation.



Note: Time required to deploy new virtual instance varies.

The speed of your network determines how quickly the image loads. Completing the RealPresence Platform Director deployment can take as little as five minutes or as long as an hour or more.

To deploy the RealPresence Platform Director *.OVA template in a vCenter or supported virtual server environment:

- 1 Open the vSphere application connecting to your vCenter or vSphere server where the RealPresence Platform Director will be installed.
- 2 In the main **vCenter** menu, go to **File > Deploy OVA Template** to open the **Source** selection window.

- 3 In the **Deploy from a file or URL** dialog, enter the valid URL or browse to the file where the RealPresence Platform Director *.OVA is located. Then click **Next**.
- 4 Select the check box to accept the End User License Agreement (EULA) to continue.
The EULA displayed in this screen includes licensing terms for all RealPresence Platform Director Solution components, and it must be acknowledged for all the Polycom products that the RealPresence Platform Director deploys.
- 5 In the **Name and Location** window, type a descriptive name for the RealPresence Platform Director instance. Then select an inventory location from the list of those available in your virtual data center. Click **Next**.
- 6 In the **Host / Cluster** window, select an available host or cluster for where the image file will be stored. Then choose a **Resource Pool** within the Host Cluster.
- 7 In the **Storage** window, select an available storage destination for the RealPresence Platform Director virtual machine files. Click **Next**.
- 8 In the **Disk Format** window, select a provisioning policy among those available on the list.
This selection is left to the discretion of individual administrators and is dependent upon how disk clusters have been configured in your data center.
- 9 Verify the selections in the **Deploy OVF Template** window, and then click **Next**.
- 10 Select the **Power on after deployment** option to restart the server after the deployment is complete, and then click **Finish** to begin the deployment in your vCenter.

Configure the RealPresence Platform Director System

Next, configure the RealPresence Platform Director system using the Polycom Management Console. After completing the initial configuration, you can use the new system to deploy other RealPresence Platform products and perform the associated licensing tasks.

The initial configuration of RealPresence Platform Director involves the following tasks.

- [Open the Polycom Management Console](#)
- [Stop RealPresence Platform Director Services](#)
- [Configure the Basic Network](#)
- [Configure the DNS Server Settings](#)
- [Set a Host Name for the RealPresence Platform Director Instance](#)
- [Generate a Self-Signed Security Certificate](#)
- [Restart RealPresence Platform Director Services](#)

If you choose to configure network settings and use static IP in the configuration, Polycom recommends completing the steps in the order listed to install a new RealPresence Platform Director instance. That order is reflected in the numbering of the tasks on the Polycom Management Console. If you choose to use DHCP to assign IP and related network information to the RealPresence Platform Director instance, you can skip the network configuration steps and then generate a security certificate to make the instance available in your network environment.

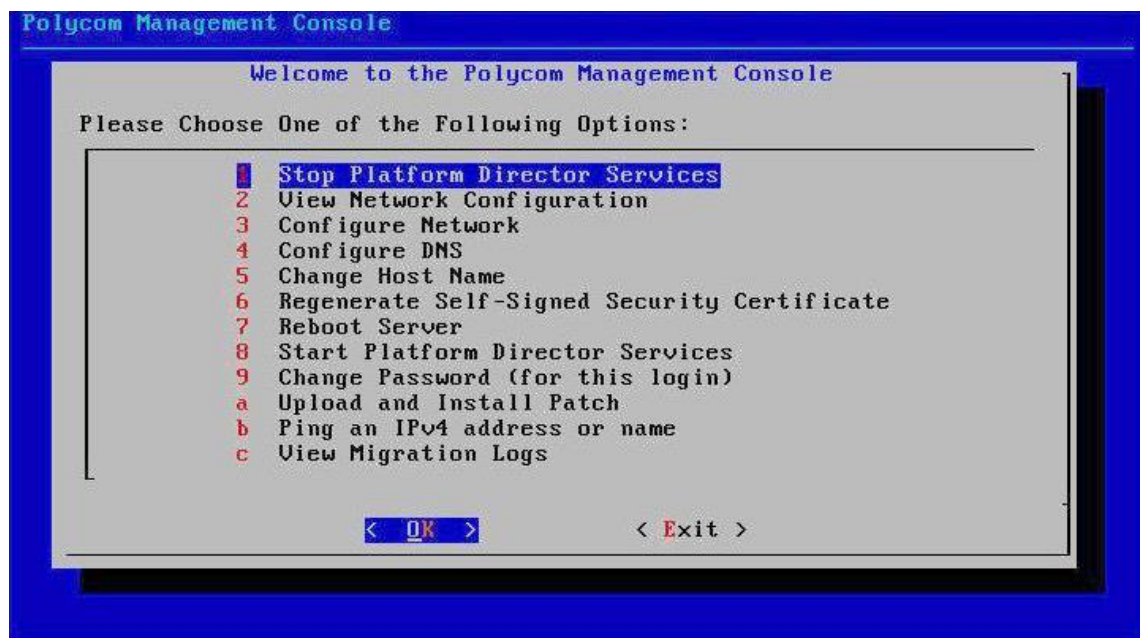
Open the Polycom Management Console

When the image deployment is complete, open the appropriate console menu tab to access the Polycom Management Console. This console helps you configure the RealPresence Platform Director instance to run in your virtual environment. Use the console in the EXSi host if you are not deploying in a vCenter. The following instructions describe the process for using vCenter to host your RealPresence Platform Director system. Use the console in the EXSi host if you are not deploying in a vCenter.

To open the Polycom Management Console:

- 1 In the main **vCenter Administrator** menu, select the **Console** tab to open the vCenter console menu.
- 2 At the localhost login prompt, type *polycom* for both the user name and password to open the Polycom Management Console, as shown next.

Polycom Management Console



From the Polycom Management Console, you can configure the RealPresence Platform Director instance that you deployed in your virtual server environment. It includes a list of the steps required to complete the configuration, along with options for changing the console password, uploading and installing a software patch, using the *ping* command to verify an IPv4 address or name on your network.

With the Polycom Management Console open, you can begin configuring the RealPresence Platform Director instance to run in your virtual environment.



Note: Change the Polycom Management Console password

Polycom recommends changing the Management Console password for the *polycom* user. To change the password, select option **9—Change Password (for this login)**. Follow the prompts to change the password.

Stop RealPresence Platform Director Services

To begin configuring the RealPresence Platform Director instance, you must first stop the RealPresence Platform Director services that are running on the server.

To stop the RealPresence Platform Director services:

- » From the **Polycom Management Console**, select option **1–Stop RealPresence Platform Director Services**. Then select **Yes** in the confirmation window.

You can move to the next step when a message confirms the services have been stopped.

Configure the Basic Network

You must associate a network card and IP address with the RealPresence Platform Director instance.

To configure the network for the RealPresence Platform Director instance:

- 1 From the **Polycom Management Console**, select option **3–Configure Network**.
- 2 In the **Choose Network Interface** window, select a network interface card to control the Ethernet connection to the server.
- 3 In the **Choose Interface Mode** window, do one of the following:
 - If you want to set a permanent IP address for the network card, select option **1–Static address setup**. Then, in the next window, enter the IP address, network mask, and default gateway.
 - If you want to assign an address dynamically, select option **2–Set DHCP On**.Select **OK** when you have completed the Interface Mode configuration. The system stops the network services and restarts them with the new IP settings.
- 4 Verify that the network settings are correct in the **Current Network Setup** window. Then select **OK**.

Configure the DNS Server Settings

The DNS server identifies the IP address of the server that RealPresence Platform Director uses to resolve hostnames. While a DNS Server may have been previously specified in the configuration, it should be overwritten with the correct DNS server address for your network.

To configure the DNS server settings:

- 5 From the **Polycom Management Console**, select option **4–Configure DNS**.
- 6 Verify the **Domain**, **Search Domain**, and **Name Server** settings in the **DNS Configuration** window. Change them as necessary, and then select **OK** when the configuration is complete.

Set a Host Name for the Instance

Next, set a domain name for the RealPresence Platform Director instance you are installing.

To set the Host Name for RealPresence Platform Director:

- 1 From the **Polycom Management Console**, select option **5–Change Host Name**.
- 2 In the **Change Host Name** window, use the **Delete** or **Backspace** key to delete the default **localhost.localdomain** name setting. Then type the new host name along with your company's domain in the form of the fully qualified domain name to be used to access the RealPresence Platform Director from a web browser.
- 3 Select **OK** to return to the Polycom Management Console.

Generate a Self-Signed Security Certificate

Because RealPresence Platform Director requires HTTPS to secure data transactions, you must generate a self-signed trust certificate before you complete the configuration and open the RealPresence Platform Director administrator interface for the first time.

To generate a self-signed security certificate for the RealPresence Platform Director instance:

- » From the Polycom Management Console, select option **6–Generate Self-Signed Security Certificate**. Click **Yes** in the confirmation window to generate the certificate.

When you have completed the configuration, you can [create signed certificate requests](#) and [upload third-party certificates](#) to the server as required.

Restart RealPresence Platform Director Services

To apply new configuration settings, you must restart the RealPresence Platform Director services.

To restart the RealPresence Platform Director services:

- » From the **Polycom Management Console**, select option **8–Start RealPresence Platform Director Services**. Select **Yes** in the confirmation window.

You can also choose option **7-Reboot Server** to reboot the server entirely.

After the services have restarted, you can start the RealPresence Platform Director instance and begin configuring licenses for it.

Configure Licenses for the RealPresence Platform Director Instance

After you have configured a new RealPresence Platform Director instance, open it using a web browser, and create a license server on which to activate licenses that your organization has purchased for the product. After activating the initial license for RealPresence Platform Director, you can allocate individual licenses to it and then begin using the system to add and manage other RealPresence component products.

**Caution: Activate licenses before using the system.**

Licenses for RealPresence Platform Director must be activated and validated before you can use RealPresence Platform Director to manage your RealPresence solution system.

Setting up licenses for RealPresence Platform Director involves the following steps:

- [Open the New RealPresence Platform Director Instance](#)
- [Log In to the Polycom Licensing Center](#)
- [Activate Licenses for the RealPresence Platform Director](#)

Open the New RealPresence Platform Director Instance

To begin setting up licenses, log in to the new RealPresence Platform Director instance using a supported web browser. For a list of supported web browsers, see [Web Browser Requirements](#).

When you first log in to the RealPresence Platform Director as an administrator, only the **LICENSE MANAGEMENT** tab is available. You must complete the license activation process before you have access to the all of the functions available on the **Administrator menu**.

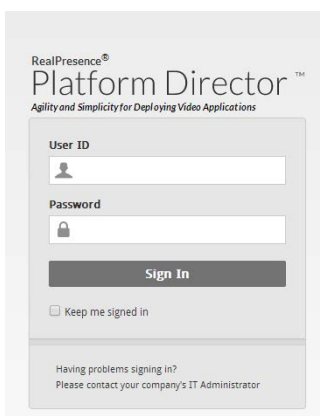
To open a RealPresence Platform Director instance:

- 1 In the address bar of a supported web browser, type the address of the main login page using the IP address of the instance, as follows:

https://[IP address for the RealPresence Platform Director instance]

The RealPresence Platform Director login screen opens, as shown.

RealPresence Platform Director login screen



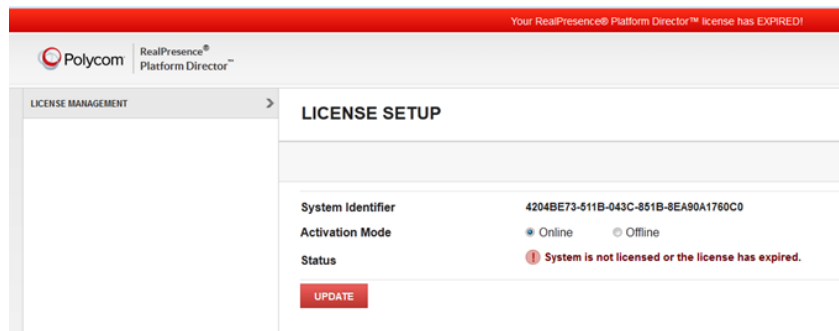
- 2 Do one of the following:
 - If this is your first time logging in to this instance, type *admin* as the **User ID** and *Polycom12#\$* as the **Password**. Accept the End User License Agreement (EULA), and then follow the prompt to change the admin password.
 - If this is not your first time logging in to this instance, enter the correct *admin* user name and password for this instance.

The initial login may take a minute or more.

On the first login, the menu available includes only the **License Management** function. The full menu is made available after licensing for RealPresence Platform Director has been activated.

- 3 From the RealPresence Platform Director **Administrator menu**, go to **LICENSE MANAGEMENT**. On the **LICENSE SETUP** page, a message indicates that the system is not licensed or the license has expired, as shown next.

License Management page with System Identifier



Note the System Identifier number listed on the page, and keep the page open so that you can refer to it again in the next steps. When you begin activating RealPresence system licenses on the Polycom Licensing Center site, you will copy and paste the unique number listed on this page to begin activating system licenses.

Log In to the Polycom Licensing Center

When your organization purchased licensing for RealPresence Platform Director 1.7.0 or later, Polycom sent an email containing a URL and login to the Polycom Licensing Center. Use that information to log in to the Polycom Licensing Center to set up a license server and manage your Polycom RealPresence licenses.

If your RealPresence Platform Director instance does not have direct access to the internet, you can log in to the Polycom Licensing Center from a computer that does have internet access and then use the offline process to activate the license. With the offline process, you can download a license file from the Licensing Center and then upload it into the virtual Platform Director environment.

To log in to the Polycom Licensing Center:

- 1 Paste or type the URL for the Polycom Licensing Center into the address bar of a web browser.
- 2 On the login page, type the **Login ID** and **Password** that Polycom provided to your organization with the organization's entitlement information.

A successful login opens the **Polycom Licensing Center** page as shown next.

Polycom Licensing Center landing page

The screenshot shows the Polycom Licensing Center landing page. On the left is a navigation menu with three main sections: **Software & Services**, **Devices**, and **Administration**. Under **Devices**, the **Create Server** link is circled in red. The main content area has a header 'Polycom Licensing Center' and a welcome message. Below the welcome message are three sections: **Recent Email Notifications** (with the message 'You have no recent emails.'), **Recent Files Posted** (with the message 'You have no recent files.'), and **Browse My Software and Documentation** (with tabs for 'My Products' and 'Product Lines').

- 3 On the **Polycom Licensing Center** page, click **Create Server** to open the **Create Server** page and create a license server for your RealPresence products.

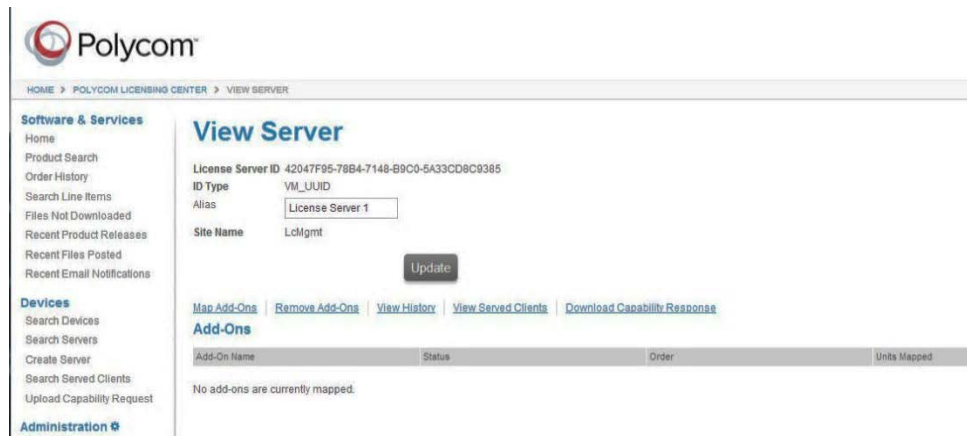
Enter information in the text and drop-down lists as outlined in the following table.

Polycom License Center—Create Server page

| <i>Field</i> | <i>Value/Description</i> |
|-------------------|--|
| License Server ID | Copy and paste the System Identifier number from the License Management page that appeared when you first logged in to the RealPresence Platform Director instance. |
| Backup Device ID | Currently not supported. Leave this field blank. |
| Alias | (Optional) A unique name for your license server, if you wish to assign one. |
| Site Name | (Optional) A descriptive name for your Polycom RealPresence license management site. |

- 4 After completing the information in the text and drop-down boxes, click **Create**.
When the license server has been created successfully, a **View Server** page displays your valid License Server ID, ID Type, and Site Name, as shown next.

View Server page showing a successful license activation



Next, you map and generate available licenses to your RealPresence system. See [Activate Licenses for the RealPresence Platform Director](#).

Activate Licenses for a RealPresence Platform Director Instance

After setting up your license server, you must activate available licenses for the RealPresence Platform Director. You can manage licenses for individual components of your RealPresence system after those instances have been added to the system.



NOTE: License activation may require 5-10 minutes to take effect in the system.

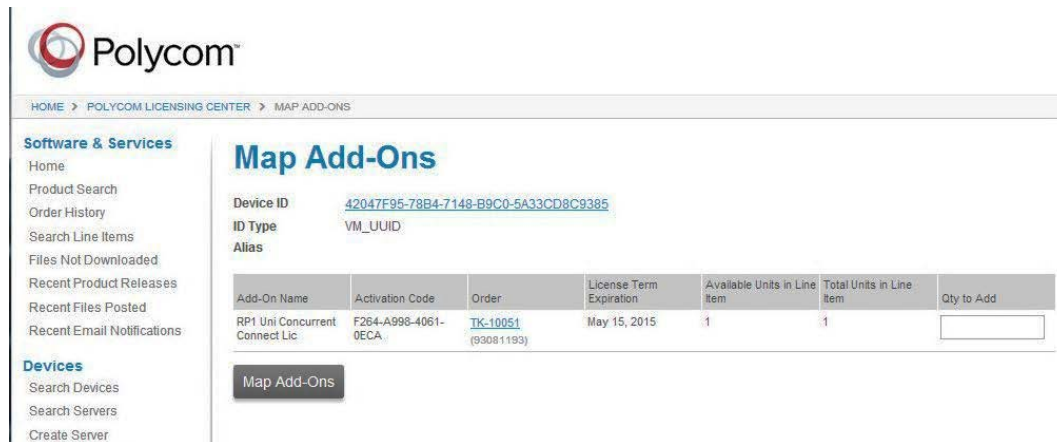
Activating licenses for Polycom RealPresence components requires communications between Polycom RealPresence instances in your system and may require 5-10 minutes to take effect across the network. If you do not see the licensing information you expect to see on the License Management page after activating RealPresence licenses, refresh the browser or the page, or navigate away from the License Management page and then return to it to refresh the data.

For more information on how to manage licenses in your RealPresence environment, see [Manage Licenses](#).

To activate licenses for the RealPresence Platform Director:

- 1 On the Polycom Licensing Center **View Server** page, click the **Map Add-Ons** link to show a list of available units for features your organization has purchased, as shown next.

Partial sample list of available add-on features for licensing



The screenshot shows the Polycom licensing center interface. The main heading is 'Map Add-Ons'. Below the heading, there are fields for 'Device ID' (42047F95-78B4-7148-B9C0-5A33CD8C9385), 'ID Type' (VM_UUID), and 'Alias'. A table lists available licenses with columns for Add-On Name, Activation Code, Order, License Term Expiration, Available Units in Line Item, Total Units in Line Item, and Qty to Add. The table contains one row for 'RP1 Uni Concurrent Connect Lic' with an activation code of 'F264-A998-4061-0ECA', an order of 'TK-10051 (93081193)', a license term expiration of 'May 15, 2015', 1 available unit, and 1 total unit. A 'Map Add-Ons' button is located below the table.

| Add-On Name | Activation Code | Order | License Term Expiration | Available Units in Line Item | Total Units in Line Item | Qty to Add |
|--------------------------------|---------------------|------------------------|-------------------------|------------------------------|--------------------------|----------------------|
| RP1 Uni Concurrent Connect Lic | F264-A998-4061-0ECA | TK-10051 (93081193) | May 15, 2015 | 1 | 1 | <input type="text"/> |

- 2 In the **Qty to Add** column for the listed **RP1 Uni-Concurrent Connect Lic**, enter the number of licenses of those available to allocate to the RealPresence Platform Director instance.

If your organization is installing a single RealPresence Platform Director instance, allocate all of the available licenses to it. If your organization is using two or more RealPresence Platform Director instances, allocate only a portion of the available licenses to the current instance so that the licenses will be available for subsequent instances when they are installed.

- 3 Click **Map Add-Ons** to allocate the licenses.

- If your RealPresence Platform Director instance does not have access to the internet, click **Download Capability Response** to download a local copy of the license file. This download allows you to manage RealPresence system licenses offline. Note the location of the license file when you download it to your local computer. You will upload this file to the RealPresence Platform Director instance to activate the licensing.
- If your RealPresence Platform Director system has access to the internet, you must use the online method to license the system and its components. The offline method for managing licenses is not an option when internet access is available.

The **View Server** page displays a list of available licenses, along with their status, expiration date, and other information. The status indicates whether the license has been generated. A license must be generated to allow the corresponding system component to operate within your RealPresence system.

Allocated license Add-Ons showing “License not generated” status

The screenshot shows the Polycom licensing center interface. The main content area displays a message: "The add-ons were successfully mapped." Below this, there is a section for "License Server ID" with the value "42047F95-78B4-7148-B9C0-5A33CD9C9385". There are input fields for "ID Type" (set to "VM_UUID"), "Alias", and "Site Name", along with an "Update" button. Below this, there are links for "Map Add-Ons", "Remove Add-Ons", "View History", "View Served Clients", and "Download Capability Response".

| Add-On Name | Status | Order | Units Mapped | License Term Expiration | Downloadable Items |
|--------------------------------|-----------------------|------------------------|--------------|-------------------------|--------------------|
| RP1 Uni Concurrent Connect Lic | License not generated | TK-10851 (30481198) | 1 | May 15, 2015 | None |

- 4 Return to the **License Setup** page, and do one of the following:
 - Click **Online** if your virtual environment has access to the Internet and can use the online method for managing licenses.
 - Click **Offline** if your virtual environment does not have access to the Internet and therefore requires use of the offline, file-based method for managing licenses. The screen prompts will guide you through the offline update process using the license file previously downloaded from the Polycom Licensing Center.
- 5 Click **Update** to complete the license activation process, as shown next.

License Setup dialog prior to updating the RealPresence Platform Director license

LICENSE SETUP

System Identifier: 4204BE73-511B-043C-851B-8EA90A1760C0

Activation Mode: Online Offline

Status: ❗ System is not licensed or the license has expired.

UPDATE

A successful activation produces an active license notation, as shown next. After clicking **UPDATE**, you may need to refresh the browser screen to show the activated license.

License setup showing valid, active license

LICENSE SETUP

System Identifier: 4204680E-2E8B-29B2-4499-2DF3C831987D

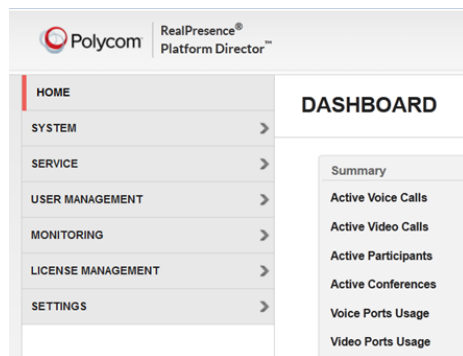
Activation Mode: Online Offline

Status: ✔ License Active

UPDATE

After a successful license update for RealPresence Platform Director licensing, the full menu and dashboard become available for managing the system and its components. After the RealPresence Platform Director instance has been activated, you can begin adding other RealPresence components to the RealPresence Platform Director system.

Full RealPresence Platform Director Administrator menu



After properly activating the RealPresence Platform Director license, you must configure the instance so that it can begin managing and monitoring instances of supported RealPresence component products. For a listing of supported product, see [Supported RealPresence Virtual Editions](#) in this document.

Configure the RealPresence Platform Director Instance for Basic Operation

To begin operating a new instance of RealPresence Platform Director, you must set up a basic configuration, which includes adding a provider, a zone, and – if you are using vCenter – a resource group.

To configure a new RealPresence Platform Director for basic operation and prepare it to begin monitoring and managing component product instances, perform the following tasks:

- [Set Up a Provider for the RealPresence Platform Director Instance](#)
- [Set Up a Zone to the RealPresence Platform Director Instance](#)
- [Add a Resource Group to a Zone](#)

Set Up a Provider for the RealPresence Platform Director Instance

The Provider includes a URL for the VMware Data Center and user account credentials required to create new instances and manage existing ones. At least one provider must be defined for each RealPresence Platform Director instance.

To set up a Provider in the RealPresence Platform Director configuration:

- 1 Log in to the RealPresence Platform Director interface as an administrator or equivalent super-user with administrator privileges.

- 2 From the RealPresence Platform Director **Administrator** menu, go to **SYSTEM > Providers** to display the **PROVIDERS** page.
- 3 Click **+ PROVIDER** to open the **Add a Provider** page.
- 4 Enter the Provider details as outlined in the following table.

Provider Details descriptions

| <i>Field</i> | <i>Value/Description</i> |
|--------------------|--|
| Name | A unique name (80 characters maximum) for the Provider. |
| Provider Type | Select VMware. Only VMware is supported. |
| URL | The URL for the vCenter server. The syntax for a VMware provider URL is as follows: <code>https://<IP address of data center>/sdk</code> In place of the IP address, you can use the fully qualified domain name (FQDN) for the vCenter. |
| Username | The username, with full access rights, for accessing the VMware vCenter. See the appendix to this Administrator Guide for a detailed description of required vCenter access rights. |
| Password | The password for the user. |
| Ignore Certificate | Select Yes to ignore certificate validation when accessing the vCenter. Adding certificate trust chains to RealPresence Platform Director for your vCenter certificate is highly recommended; however, you may choose to ignore certificate validation to establish communications with the vCenter. |

- 5 Click **ADD** to add the Provider.

After the default provider has been added for the RealPresence Platform Director instance, you must set up a Zone in which to manage the RealPresence component products that will operate in your environment. If you are using vCenter, you must also add at least one resource group.

See the *RealPresence Platform Director Administrator Guide* more information on how to manage Providers in your RealPresence Platform Director environment.

Set Up a Zone within the RealPresence Platform Director Instance

A *zone* is a RealPresence Platform Director concept that encompasses a time zone, one or more Network Time Protocol (NTP) servers, and a collection of resource groups that help you configure and manage your Polycom video collaboration environment. RealPresence Platform Director associates each virtual machine instance that it manages with a zone. New instances in the zone are configured to use the NTP servers that have been defined for that zone.

See [Manage Resource Groups](#) for more information on how to configure and work with resource groups in a RealPresence collaboration environment.



Note: Configuring NTP servers in your RealPresence environment

While RealPresence Platform Director allows for the use of many NTP servers in a Polycom RealPresence environment, most of the subcomponents at this time support only two NTP servers. Because of this limitation, we recommend referencing no more than two separate NTP servers within your Polycom RealPresence system.

Each RealPresence Platform Director system must contain at least one zone in which RealPresence component appliances and virtual instances operate.

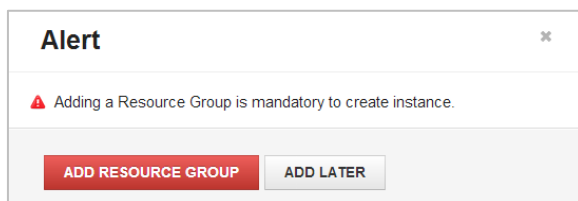
To set up a zone within a RealPresence Platform Director instance:

- 1 From the RealPresence Platform Director **Administrator menu**, click **SYSTEM > Zones** to open a list of current zones.
- 2 Click **+ ZONE** to display the **Add a New Zone** dialog.
- 3 Enter the zone details, as outlined in the following table.

Zone Details Configuration

| <i>Field</i> | <i>Value/Description</i> |
|--------------|--|
| Name | Enter a name (80 or fewer characters) for the zone. |
| Description | Enter a brief description (100 or fewer characters) for this zone. |
| Time Zone | Choose a default time zone for this RealPresence Platform Director zone. |
| NTP Server | Enter one or more NTP servers to synchronize time between RealPresence instances in this zone. |

- 4 Click **ADD** to add the new zone to the RealPresence Platform Director system.
- 5 Follow the prompt in the alert that directs you to add a resource group to the zone, as shown next.



- 6 Click **ADD LATER**. Then follow the instructions to add a resource group to the zone.


Add a Resource Group to a Zone

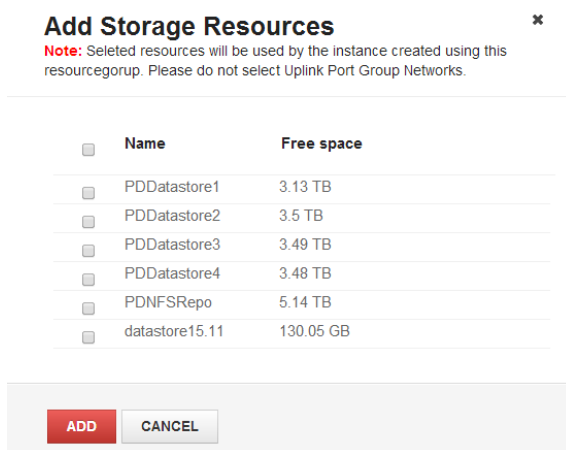
A resource group operates within a zone in a RealPresence Platform Director system. You can add a resource group to any defined zone. It provides another way to logically group and effectively manage virtual resources in your RealPresence Platform Director environment. As an example, you may want to allocate all of your compute- and memory-intensive instances to be deployed to particular clusters or hosts in your virtual environment because those hosts have ample capacity to support those needs. You

can create one or more resource groups to encompass those resources and then monitor them separately to ensure appropriate capacity and performance.

Resource Groups are required only in vCenter environments.

To add a resource group to a zone:

- 1 From the RealPresence Platform Director **Administrator menu**, go to **SYSTEM > Zones**.
- 2 Click  next to the appropriate zone, and then select the **Resource Groups** tab.
- 3 Click **+ RESOURCE GROUP** to open the **Add a new resource group** page.
- 4 Enter a unique **Name** and select a **Provider** for the resource group.
- 5 In the **Computer Resource** section, select a **Data Center**, **Host/Cluster**, and optional **Resource Pool** from the lists of those available.
After you have made a selection in the Host/Cluster drop-down list, the **+ STORAGE** and **+ NETWORK** buttons appear.
- 6 Click **+ STORAGE** to open the **Add Storage Resources** dialog showing a list of available storage resources and the amount of space available on each. A sample dialog is shown next.



- 7 Select a checkbox to use one or more storage resources, and then click **ADD**. To select all resource options in the list, click the checkbox at the top of the column.
- 8 Click **+ NETWORK** to open the **Add Network Resources** dialog showing a list of available virtual networks.
- 9 Select one or more of the available network resources, and then click **ADD**. To add all resource options in the list, select the checkbox at the top of the column.
- 10 From the **Default Network** drop-down list, select a default network. You can select a default network only after you have chosen at least one network resource.
- 11 Enter a value in the **Inventory Path** text field. The system adds a value based on the criteria you have selected. You can keep this value or enter a new value.

The path you enter in this field must exist in the vCenter and contain the name of the data center, followed by `/vm`. If the data center has folders, a folder path can be appended to the end of the inventory path value. New virtual instances will be deployed to the last folder in the path.

For example, in the inventory path named *NewYorkDataCenter/vm/[folder1]/[subfolder]*, new virtual machines will be deployed to *[subfolder]* within the data center called *NewYorkDataCenter*.

12 Click **CREATE** to add the new resource group to the system.

With a working zone and resource group in place, you can begin adding virtual instances of other RealPresence virtual products to your RealPresence Platform Director environment.

Next Steps

After you have set up the RealPresence Platform Director instance, activated licenses, and added at least one zone and resource group, you can begin setting up RealPresence component products for licensing and monitoring within the RealPresence Platform Director system.

See the section entitled *Deploy RealPresence System Components* in the *RealPresence Platform Director Administrator Guide* for detailed instructions on how to add RealPresence component products to your RealPresence Platform Director system.

To continue setting up RealPresence component images to run in your RealPresence Platform Director environment, follow the instructions for completing one or more of the following tasks:

- 1 Add Virtual Edition images to RealPresence Platform Director.
- 2 Create new instances of Virtual Edition images.
- 3 Alternatively, add existing instances to RealPresence Platform Director.
- 4 Configure SNMP Monitoring for Virtual Edition instances.