



GETTING STARTED GUIDE

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# RealPresence<sup>®</sup> Platform Director<sup>™</sup>



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# About This Guide

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This *Getting Started Guide* provides the information you need to install and configure a Polycom® RealPresence® Platform Director™ system for the first time. After completing the steps described in this guide, see the *RealPresence® Platform Director™ Administrator Guide* for instructions on how to set up and manage your RealPresence Platform Director system and its environment, add RealPresence component products to it, and license and monitor those components.

## Audience, Purpose and Required Skills

This *Getting Started Guide* is written for a technical audience with knowledge of virtual machine environments, networking, security certificates, and software configuration.

This guide assumes that you are deploying and setting up an instance of the RealPresence Platform Director system in a VMware vSphere or Microsoft Hyper-V virtual data center.

## Get Help

For more information about installing, configuring, and administering Polycom products, refer to **Documents and Downloads** at [Polycom Support](#).

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

- *RealPresence® Platform Director™ Release Notes*
- *RealPresence® Platform Director™ Administrator Guide*
- *RealPresence® Platform Director™ Getting Started Guide*

VMware® vSphere® support and documentation is available at:

- <https://www.VMware.com/support/pubs/vsphere-esxi-vcenter-server-pubs.html>
- <https://my.VMware.com/web/VMware>

Microsoft® Hyper-V® support and documentation is available at:

- <https://technet.microsoft.com/en-us/library/hh831531.aspx> (Hyper-V in Windows Server 2012 R2)
- <https://technet.microsoft.com/library/hh833684.aspx> (Hyper-V Server 2012 R2)

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## Polycom and Partner Resources

To learn more about Polycom RealPresence Platform products, visit [Polycom Support](#) for links to information and downloads for the following.

- Polycom® RealPresence® DMA® 7000
- Polycom® RealPresence® Resource Manager
- Polycom® RealPresence® Access Director™
- Polycom® RealPresence® Collaboration Server
- Polycom® RealPresence® CloudAXIS™ Suite
- Polycom® RealPresence® Web Suite

To find all Polycom partner solutions, see [Strategic Global Partner Solutions](#).

## The Polycom Community

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

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## Virtual Environment Requirements

The RealPresence Platform Director system can be deployed in the following virtual environments:

- An environment equipped with a VMware vSphere infrastructure (vCenter or ESXi host). After deployment, RealPresence Platform Director can be configured to license and monitor RealPresence Platform components. In a vCenter environment, a RealPresence Platform Director system with the proper permissions can deploy and manage those components.
- An environment equipped with a Microsoft Hyper-V infrastructure (Microsoft Windows Server 2012 R2 with the Hyper-V role). After deployment, RealPresence Platform Director can be configured to license and monitor RealPresence Platform components. Components are deployed and managed using Hyper-V Manager or Microsoft Management Console.

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

# Preparation for System Installation

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The following sections describe preparing for the initial installation and setup of a Polycom® RealPresence® Platform Director™ system:

- [Prepare for Software Deployment](#)
- [Complete the Setup Worksheet](#)
- [For VMware, Confirm Desired Functionality](#)

## Prepare for Software Deployment

Complete the tasks outlined below to prepare to deploy the RealPresence Platform Director system in your virtual data center environment. Record the relevant information in the [setup worksheet](#) that follows this section.

- 1 Read the *Release Notes* for the version of RealPresence Platform Director that you are deploying and confirm that your system meets the 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 any RealPresence Virtual Editions, RealPresence One, or RealPresence CloudAXIS products.
- 3 To access the VMware or Hyper-V host and configure the Platform Director system, ensure that you have a PC with:
  - 1280x1024 (SXGA) minimum display resolution; 1680x1050 (WSXGA+) or greater recommended.
  - Current version of Mozilla Firefox or Google Chrome browser.
  - Network access to your data center.
  - The vSphere Client or Hyper-V Manager, as appropriate for your environment.
- 4 Ensure you have the correct credentials needed for the installation.
  - For a Hyper-V deployment, the server name and log-in credentials of the Microsoft Hyper-V server that will host the RealPresence Platform Director system, or if applicable, the Microsoft System Center Virtual Machine Manager (VMM) that manages the Hyper-V host(s).
  - For a VMware deployment, ensure that your VMware user login has permission to deploy OVF/OVA files.
  - If deploying in a vCenter environment and you want to use RealPresence Platform Director to deploy software and monitor your VM infrastructure, you need to obtain administrator login credentials for the vCenter environment where RealPresence Platform Director is being installed.

See Appendix 1 of the *RealPresence Platform Director Administrator Guide* for information on specific permissions required.
- 5 Confirm that the required ports are available. For a list of ports used in a RealPresence Platform Director installation, see Appendix 2 of the *RealPresence Platform Director Administrator Guide*.

- 6 Download the RealPresence Platform Director \*.zip file (for Hyper-V) or \*.ova file (for VMware) from its [Polycom support web site](#), and note the location of the file on your network.
- 7 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.
- 8 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.
- 9 Assign a local host name 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.

## Complete the Setup Worksheet

As you prepare for deployment of the RealPresence Platform Director system, use the following worksheet to record the information needed for your system.

| <i>Field</i>            | <i>My system values</i> | <i>Description</i>  |
|-------------------------|-------------------------|---|
| <b>Network settings</b> |                         |   |
| IP Address (IPv4)       |                         | Static, physical IP address for the RealPresence Platform Director system.  |
| Network Mask            |                         | Network subnet mask to be used with the IP address assigned to the RealPresence Platform Director.  |
| Default Gateway         |                         | IP address of the gateway server/router.  |
| DNS server names        |                         | Names of the domain name servers on your network that will resolve the domain and other system names for the RealPresence Platform Director instance.   |
| DNS server IP addresses |                         | IP addresses of the domain name servers.  |
| Local host name         |                         | Host name 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. |

| <i>Field</i>                           | <i>My system values</i> | <i>Description</i>  |
|--|-------------------------|---|
| <b>Virtual environment information</b> |                         |   |
| Provider Name                          |                         | For a VMware vCenter environment, a unique name for the provider in your vCenter.<br>Not applicable to a Hyper-V or non-vCenter VMware environment. |
| URL                                    |                         | The IP address or FQDN of the server you log into in order to deploy the system in your virtual environment.  |
| User name                              |                         | The login name of the user that has permission to deploy software in your virtual environment.  |
| Password                               |                         | The password for the user.  |

## For VMware, Confirm Desired Functionality

In a VMware environment, you can deploy RealPresence Platform Director within a vCenter or any EXSi host or cluster. But if you want to use RealPresence Platform Director to deploy RealPresence Platform Virtual Editions and monitor your VM infrastructure, you must have vCenter and you must have the correct write permissions to instantiate a virtual instance within vCenter.

See Appendix 1 of the *RealPresence Platform Director Administrator Guide* for information regarding the specific permissions required for RealPresence Platform Director to deploy instances and monitor your VM infrastructure.

### RealPresence Platform Director functionality based on VM infrastructure

| <i>VMWare Environment</i>            | <i>RealPresence Platform Director Functionality</i>   |
|--------------------------------------|---|
| vCenter with appropriate permissions | Full functionality  |
| vCenter with read-only permissions   | Cannot use "Create a new instance"<br>Cannot power on, power off, or delete instances   |
| vCenter with no permissions          | Cannot use "Create a new instance" or "Add new virtual instance"<br>Cannot monitor VM infrastructure<br>Cannot power on, power off, or delete instances |
| Non-vCenter environment              | Cannot use "Create a new instance" or "Add new virtual instance"<br>Cannot monitor VM infrastructure<br>Cannot power on, power off, or delete instances |



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# System Installation

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The RealPresence Platform Director system can be installed in a virtual environment with a Microsoft Hyper-V infrastructure or VMware infrastructure. Follow the instructions for your environment.



**Note: Time required to deploy a 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.

## Install the System in a VMware Environment

The installation package for deploying an instance of the RealPresence Platform Director system in a VMWare environment is delivered as a VMware Open Virtual Appliance (OVA) Template file.

A vSphere client connected to an ESXi server or vCenter can be used to deploy the RealPresence Platform Director OVA Template in your VMware virtual environment. Use your data center's standard VMware deployment procedure. If necessary, consult the appropriate documentation at [vmware.com/support.html](http://vmware.com/support.html).

After the RealPresence Platform Director instance is deployed and running, perform the initial configuration described in [Configure the New Instance in the Polycom Management Console](#).

## Install the System in a Hyper-V Environment

The installation package for deploying an instance of the RealPresence Platform Director system in a Hyper-V environment is delivered as a Hyper-V Export (.zip) file, which contains:

- A Virtual Hard Disk (VHD) file containing the Platform Director application running on the CentOS 6.6 operating system, the most recent version of Microsoft Linux Integration Services (LIS), and the Platform Director system's End User License Agreement (EULA).
- A configuration (XML) file containing information about its virtual machine environment.

Hyper-V Manager or Windows PowerShell can be used to deploy the RealPresence Platform Director VHD in your Hyper-V virtual environment. Use your data center's standard Hyper-V deployment procedures. If necessary, consult the appropriate documentation at [technet.microsoft.com](http://technet.microsoft.com).

After the RealPresence Platform Director instance is deployed and running, perform the initial configuration described in [Configure the New Instance in the Polycom Management Console](#).

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# Configure the New Instance in the Polycom Management Console

The initial configuration of a new RealPresence Platform Director instance is performed using the Polycom Management Console. After completing this initial configuration, you can log into the new system, finish setting it up, and use it to deploy (in a vCenter with permissions), license, and monitor other RealPresence Platform products.

The initial configuration 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](#)

Polycom recommends assigning a static IP to the RealPresence Platform Director instance. To do so, perform the initial configuration steps in the order listed, which is the order of the numbered options in the Polycom Management Console menu.

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

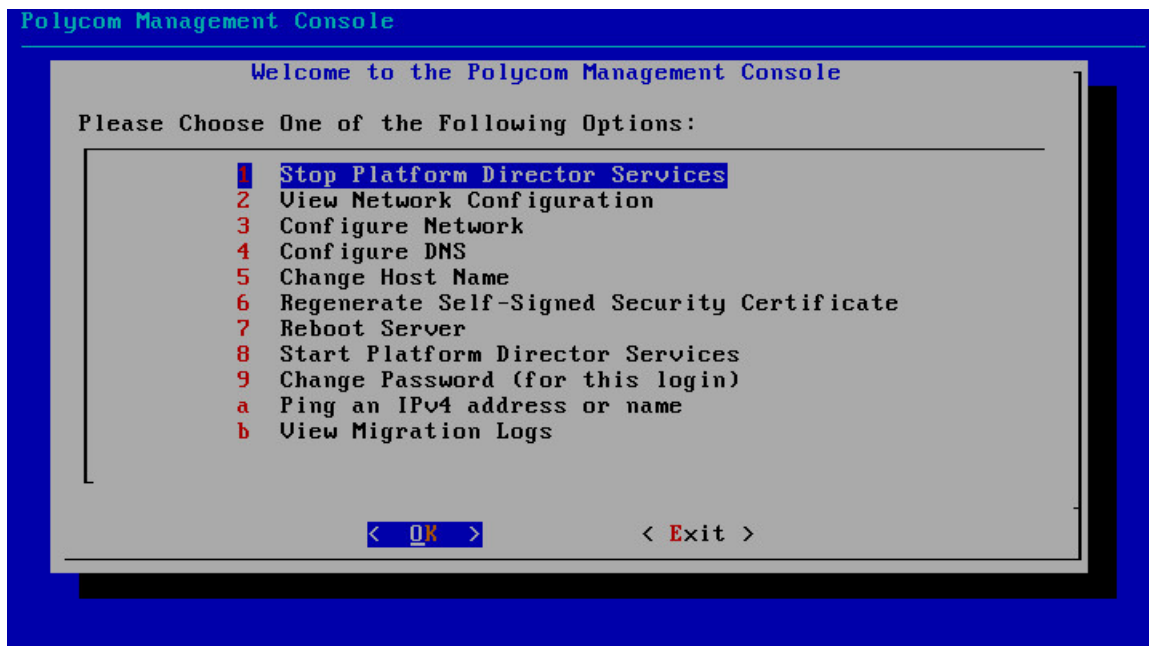
When the image deployment is complete, open the Polycom Management Console. This console helps you configure the RealPresence Platform Director instance to run in your virtual environment.

### To open the Polycom Management Console:

- 1 In the vSphere or Hyper-V client connected to the VM on which you deployed the instance, select the new instance and select **Console**.
- 2 Click in the Console and at the localhost login prompt, type *polycom* for both the user name and password.

The Polycom Management Console appears, as shown next.

## Polycom Management Console



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 virtual machine.

### To stop the RealPresence Platform Director services:

- » From the Polycom Management Console menu, select option **1–Stop 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.



### Note: If an error occurs, continue, but reboot later

If a message reports that a service failed to stop, you can continue. But later, when it's time to restart the instance, select option **7-Reboot Server**, not option **8–Start Platform Director Services**.

---

## 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 menu, select option **3–Configure Network**.
- 2 In the **Choose Network Interface** window, select the network interface card to control the Ethernet connection to the server.
- 3 In the **Choose Interface Mode** window, do one of the following:
  - To set a permanent IP address for the network card (recommended), select option **1–Static address setup**. Then, in the next window, enter the IP address, network mask, and default gateway, and select **OK**.
  - To assign an address dynamically, select option **2–Set DHCP On**.  
The system stops the network services and restarts them with the new IP settings.
- 4 From the Polycom Management Console menu, select option **2–View Network Configuration**.
- 5 In the **Current Network Setup** window, verify that the network settings are correct.
- 6 Select **OK** to return to the Polycom Management Console menu.

## Configure the DNS Server Settings

The DNS server settings identify the server(s) that RealPresence Platform Director uses to resolve host names.

**To configure the DNS server settings:**

- 1 From the Polycom Management Console menu, select option **4–Configure DNS**.
- 2 In the **DNS Configuration** window, specify the **Domain**, **Search Domain**, and **Name Server** settings for at least one and up to three DNS servers.
- 3 Select **OK** to return to the Polycom Management Console menu.

## Set the FQDN for the Instance

Next, set the fully qualified domain name (FQDN) for the RealPresence Platform Director instance you are installing.

**To set the FQDN for RealPresence Platform Director:**

- 1 From the Polycom Management Console menu, 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 organization's domain to form the fully qualified domain name to be used to access the RealPresence Platform Director system from a web browser.
- 3 Select **OK** to return to the Polycom Management Console menu.

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## Generate a Self-Signed Security Certificate

Because RealPresence Platform Director requires HTTPS to secure data transactions, you must generate a new 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:**

- 1 From the Polycom Management Console menu, select option **6–Regenerate Self-Signed Security Certificate**.
- 2 In the confirmation window, click **Yes** to regenerate the certificate.

The certificate is generated and the Polycom Management Console menu returns.

After you have completed the configuration and logged into the RealPresence Platform Director management interface, you can update your certificate configuration as required. See the *RealPresence Platform Director Administrator Guide* for information regarding certificate management.

## Restart RealPresence Platform Director Instance

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

**To restart the RealPresence Platform Director instance:**

- 1 From the Polycom Management Console menu, select option **7-Reboot Server** to reboot the VM entirely (slower, but safer) or option **8–Start Platform Director Services** to just restart the services without restarting the OS (faster).  
If a service failed to stop earlier, select option **7-Reboot Server**.
- 2 In the confirmation window, click **Yes**.

With either option, the RealPresence Platform Director application starts automatically. After the restart is complete and the application is fully functional (3-5 minutes), you can log into the system and finish configuring it for basic operation.

## Open the RealPresence Platform Director System and Finish Configuring It

After you have configured a new RealPresence Platform Director instance in the Polycom Management Console and started the application, open its management interface in a web browser and finish configuring it for basic operation. This involves the following tasks:

- [Log into the RealPresence Platform Director System](#)
- [Set Up Licensing](#)
- [Configure the RealPresence Platform Director Instance for Basic Operation](#)

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## Log into the RealPresence Platform Director System

Log into the RealPresence Platform Director system using a supported web browser. For a list of supported web browsers, see the release notes.

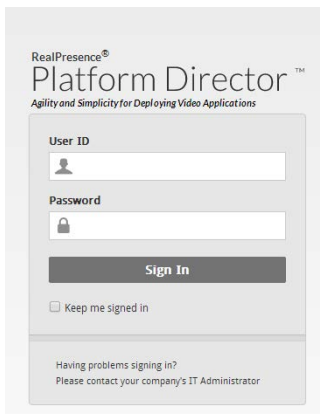
### To open the RealPresence Platform Director system:

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

*https://[IP address or FQDN 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 into this instance, enter *admin* in the **User ID** field and *Polycom12#\$* in the **Password** field. 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 into this instance, enter the correct admin password.

The initial login may take a minute or more.

On the first login, the menu includes only **License Management**, and the License Setup page is displayed. The full menu becomes available after you set up licensing.

## Set Up Licensing

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

Setting up licensing for the RealPresence Platform system involves the following steps:

- [Create a License Server in the Polycom Licensing Center](#)
- [Activate the Available Licenses](#)

## Create a License Server in the Polycom Licensing Center

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



### Note: You can use the offline process if necessary

If your RealPresence Platform Director instance does not have direct access to the internet, you can log into 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 create a license server:

- 1 In the RealPresence Platform Director management interface, go to **License Management > License Setup**.

A message indicates that the system is not licensed or the license has expired, as shown next.

#### License Setup page with System Identifier

Your RealPresence® Platform Director™ license has EXPIRED!

Polycom RealPresence® Platform Director™

LICENSE MANAGEMENT > LICENSE SETUP

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

Activation Mode  Online  Offline

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

UPDATE

- 2 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.  
To activate RealPresence system licenses on the Polycom Licensing Center site, you need this System Identifier number.
- 3 In a different browser window, log into the Polycom Licensing Center using the URL and credentials sent to you.

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

## Polycom Licensing Center page

HOME > POLYCOM LICENSING CENTER

**Software & Services**

- Home
- Product Search
- Order History
- Search Line Items
- Files Not Downloaded
- Recent Product Releases
- Recent Files Posted
- Recent Email Notifications

**Devices**

- Search Devices
- Search Servers
- Create Server**
- Search Served Clients
- Upload Capability Request

**Administration**

- Account Administrators
- Account Members

### Polycom Licensing Center

Welcome to the Download Central Homepage! Check out "My Recent Email Notifications" to view the latest update notifications. "My Recent Files Posted" displays any files posted in the past 30 days. "My Products" shows your list of products.

**Recent Email Notifications**

You have no recent emails.

**Recent Files Posted**

You have no recent files.

**Browse My Software and Documentation**

| My Products             | Product Lines |
|-------------------------|---------------|
| <a href="#">POLYCOM</a> |               |

- On the **Polycom Licensing Center** page, click **Create Server** to open the **Create Server** page.

## Polycom Licensing Center Create Server page

HOME > REALPRESENCE LICENSING CENTER > CREATE SERVER

**Software & Services**

- Home
- Product Search
- Order History
- Search Line Items
- Files Not Downloaded
- Recent Product Releases
- Recent Files Posted
- Recent Email Notifications

**Devices**

- Search Devices
- Search Servers
- Create Server**
- Search Served Clients
- Upload Capability Request

**Administration**

- Account Administrators
- Allocation Accounts
- Account Members
- Change Password
- Email Preferences
- Product Preferences
- Download Preferences
- Your Profile

### Create Server

Register a License Server to your Account

**Required Fields**

- \* **License Server ID**
- \* **ID Type** (Select from drop down list):
  - PUBLISHER\_DEFINED for RealPresence Platform Director version 2.0 and above
  - VM\_UUID for RealPresence Platform Director versions lower than 2.0

**Optional Fields:** Backup License Server ID, Alias and Site Name.

License Server ID\*

Backup License Server ID

ID Type

Alias

Site Name

- Enter information as outlined in the following table to create a license server for your RealPresence products.

### Create Server page fields

| Field             | Value/Description   |
|-------------------|---|
| License Server ID | Copy and paste the <b>System Identifier</b> number from the RealPresence Platform Director <a href="#">License Management</a> page. |
| Backup Device ID  | Currently not supported. Leave this field blank.  |

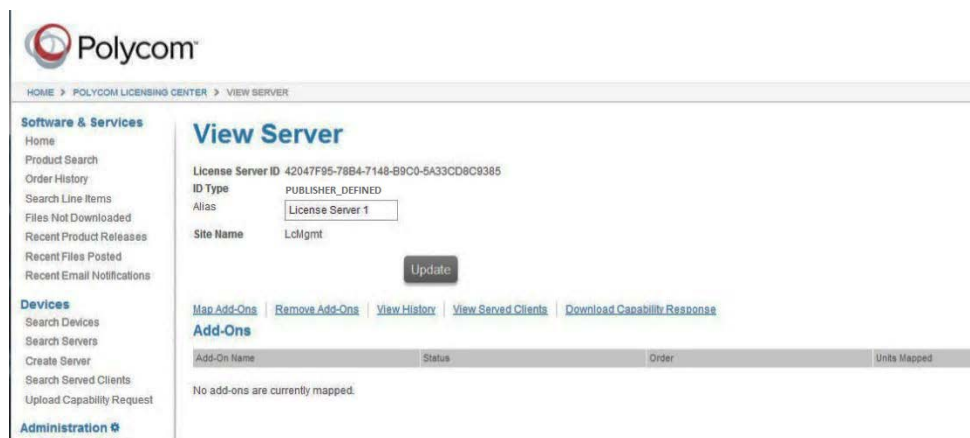


| Field     | Value/Description  |
|-----------|--|
| ID Type   | Select PUBLISHER_DEFINED.<br>Note: This is a change from previous versions, which required an ID Type of VM_UUID.  |
| Alias     | (Optional) A unique name for your license server. If your organization deploys more than one, aliases make it easier to identify each specific instance. |
| Site Name | (Optional) A descriptive name for your Polycom RealPresence license management site.   |

## 6 Click **Create**.

After the license server is successfully created, the **View Server** page displays your valid License Server ID, ID Type, and Site Name, as shown next.

### View Server page showing successfully created license server



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

## Activate the Available Licenses

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

### To activate the available licenses for the RealPresence Platform Director:

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

## Map Add-Ons page showing a RealPresence One license is available

HOME > POLYCOM LICENSING CENTER > MAP ADD-ONS

**Software & Services**

- Home
- Product Search
- Order History
- Search Line Items
- Files Not Downloaded
- Recent Product Releases
- Recent Files Posted
- Recent Email Notifications

**Devices**

- Search Devices
- Search Servers
- Create Server

### Map Add-Ons

Device ID: [42042A28-C9AC-AC9D-F3E1-D34F8E19F947](#)  
ID Type: PUBLISHER\_DEFINED  
Alias: pd-rcombs

| 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 | <a href="#">TK-10051</a><br>(93081193) | May 15, 2015            | 1                            | 1                        | <input type="text"/> |

- 2 In the **Qty to Add** column for the available licenses, enter the number 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.

The **View Server** page returns, displaying a list of the server's licenses. The status for newly-allocated licenses is *License not generated*. A license must be generated (activated on the component) to allow the corresponding system component to operate within your RealPresence Platform system.

- 4 If you allocated too many license add-on units to this RealPresence Platform Director instance and want to remove some, click **Remove Add-Ons**.

The **Remove Add-Ons** page lists the license add-ons available on this instance.

- 5 In the **Quantity to Remove** field of the add-ons you want to change, enter the number of units to remove and click **Remove Add-Ons**.

The **View Server** page returns, displaying a list of the server's licenses. The status for licenses with newly-removed units is *Copies decreasing*. The removed licenses must be deactivated within your RealPresence Platform Director system.

- 6 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.

## View Server page showing an allocated, but not generated, license

The screenshot shows the Polycom View Server interface. The main heading is "View Server". Below it, a message states "The add-ons were successfully mapped." The license details are as follows:

- License Server ID: 42047F95-78B4-7148-B9C0-5A33CD8C9385
- ID Type: PUBLISHER\_DEFINED
- Alias: [Empty text box]
- Site Name: [Empty text box]

An "Update" button is visible below the license details. Below the button are several links: "Map Add-Ons", "Remove Add-Ons", "View History", "View Served Clients", and "Download Capability Response".

Below the links is a table with the following data:

| AS-ON Name                     | Status                | Order                  | Units Mapped | License Term Expiration | Downloadable Items |
|--------------------------------|-----------------------|------------------------|--------------|-------------------------|--------------------|
| RP1 Uni Concurrent Connect Lic | License not generated | 75C12851<br>(99997199) | 1            | May 15, 2015            | None               |

- Return to the RealPresence Platform Director **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. Prompts guide you through the offline update process using the license file you previously downloaded from the Polycom Licensing Center.
- Click **Update** to complete the license activation process.

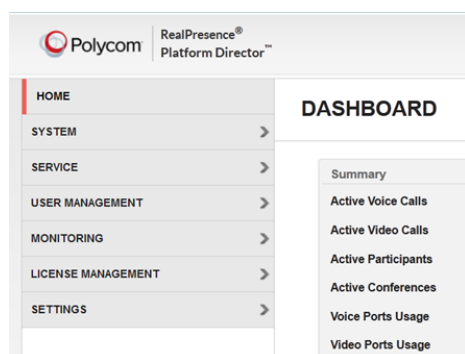
A successful activation produces an active license notation, as shown next. After you click **Update**, it may take up to 30 minutes to activate the license, and you may need to refresh the browser window.

### License Setup page after successful license activation

The screenshot shows the "LICENSE SETUP" page. The system identifier is 4204680E-2E8B-29B2-4499-2DF3C831987D. The activation mode is set to "Online" (selected with a radio button). The status is "License Active", indicated by a green checkmark. Below the status is a red "UPDATE" button.

After successful license activation, the full RealPresence Platform Director menu and dashboard become available for managing the system and its components.

### Full RealPresence Platform Director 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 products, see [Supported RealPresence Virtual Editions](#) in this document.

## Configure the RealPresence Platform Director Instance for Basic Operation

To begin operating a new instance of the RealPresence Platform Director system, you must set up a basic configuration. If you are using vCenter, this includes adding a provider and resource group. In all cases, you must set up a zone.

### vCenter Only: Set Up a Provider for the RealPresence Platform Director Instance

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

#### To set up a provider:

- 1 Log into the RealPresence Platform Director system as a user with Super Admin privileges.
- 2 Go to **System > Providers** and click **+ Provider**.
- 3 In the **Add a Provider** page, enter the provider details as outlined in the following table.

#### Provider Details

| Field         | Value/Description                                       |
|---------------|---|
| Name          | A unique name (80 characters maximum) for the Provider. |
| Provider Type | VMware is the only selection available.                 |

| <i>Field</i> | <i>Value/Description</i>  |
|--------------|---|
| URL          | The URL for the VMware vCenter Server. The syntax for a VMware provider URL is:<br>https://<vCenter IP address>/sdk<br>In place of the IP address, you can use the fully qualified domain name (FQDN) for the vCenter.                        |
| Username     | The user ID for accessing the VMware vCenter. See the <i>RealPresence Platform Director Administrator Guide</i> for a detailed description of the vCenter permissions required to enable various RealPresence Platform Director capabilities. |
| Password     | The password for the user.  |

4 Click **Add** to add the provider.

Next, 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 to the zone.

See the *RealPresence Platform Director Administrator Guide* for 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 helps you configure and manage your Polycom video collaboration environment. It encompasses a time zone, one or more Network Time Protocol (NTP) servers, and in a vCenter environment, one or more resource groups.

The RealPresence Platform Director system associates each virtual machine instance that it manages with a zone.




### Note: Specify only two NTP servers per zone

At this time, most RealPresence Platform components support only two NTP servers. Because of this limitation, we recommend referencing only two NTP servers for each zone.

Each RealPresence Platform Director system must contain at least one zone in which RealPresence component appliances and virtual instances operate. By default, a new system contains a zone named Default Zone. You can add new ones.

### To set up a zone:

- 1 Go to **System > Zones** to open a list of current zones.
- 2 To add a new zone, click **+ Zone**.  
Alternatively, click  next to **Default Zone** and edit it.

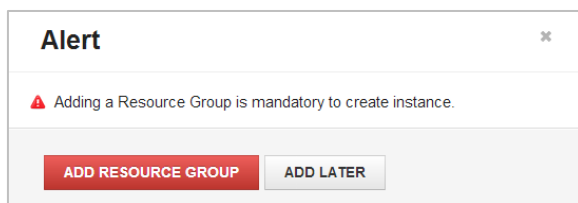
- 3 In the **Add a New Zone** page, enter the zone details, as outlined in the following table.

#### Zone Details Configuration

| Field       | Value/Description  |
|-------------|--|
| 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   | Select the time zone for this zone.                                |
| NTP Server  | Enter one or two NTP servers for this zone.                        |

- 4 Click **Add** to add the new zone to the RealPresence Platform Director system.

An alert directs you to add a resource group to the zone, as shown next. A resource group is necessary only if you are using vCenter. Instances running on an EXSi or Hyper-V host do not require a resource group.



- 5 In a vCenter environment, click **Add Resource Group** to open the **Add a new resource group** page for this zone. Then, follow the instructions in [Add a Resource Group to a Zone](#).


With a zone in place, you can begin adding other RealPresence Virtual Edition products to your non-vCenter environment. See [Next Steps](#).

## vCenter Only: Add a Resource Group to a Zone

Resource groups are required only in vCenter environments. You can add a resource group to any defined zone. It provides a way to logically group and effectively manage the available resources.

For example, you may want to deploy compute- and memory-intensive instances on specific clusters or hosts in your vCenter that have ample capacity. You can create one or more resource groups to encompass those resources and then monitor them separately to ensure appropriate capacity and performance.

#### To add a resource group to a zone:

- 1 Go to **System > Zones**.
- 2 Click  next to the appropriate zone, and then select the **Resource Groups** tab.
- 3 Click **+ Resource Group**.

- 4 On the **Add a new resource group** page, enter a unique **Name** and select a **Provider** for the resource group.

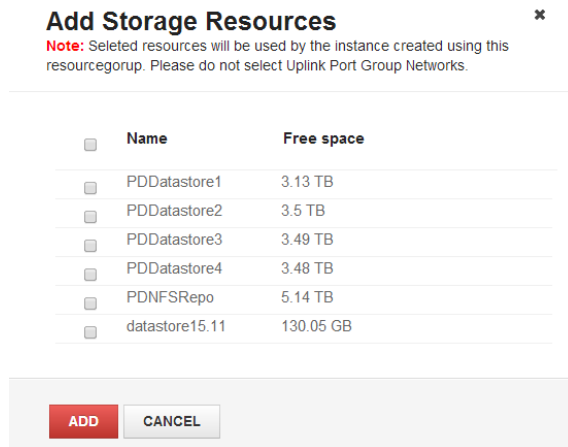
The system retrieves the resource information from the vCenter for the selected provider.

- 5 In the **Computer Resource** section, select a **Data Center**, **Host/Cluster**, and optional **Resource Pool** from the lists of those available.

After you select a **Host/Cluster**, the **+ Storage** and **+ Network** buttons appear.

- 6 Click **+ Storage**.

The **Add Storage Resources** page lists the available storage resources and the space available on each, as shown next.



| <input type="checkbox"/> | Name           | Free space |
|--------------------------|----------------|------------|
| <input type="checkbox"/> | PDDatastore1   | 3.13 TB    |
| <input type="checkbox"/> | PDDatastore2   | 3.5 TB     |
| <input type="checkbox"/> | PDDatastore3   | 3.49 TB    |
| <input type="checkbox"/> | PDDatastore4   | 3.48 TB    |
| <input type="checkbox"/> | PDNFSRepo      | 5.14 TB    |
| <input type="checkbox"/> | datastore15.11 | 130.05 GB  |

- 7 Select one or more storage resources and click **Add**. To select all, click the check box at the top of the column.

- 8 Click **+ Network**.

The **Add Network Resources** page lists the available virtual networks.

- 9 Select one or more network resources and click **Add**. To select all, click the check box at the top of the column.

- 10 From the **Default Network** list, select a default network. You can select a default network only after choosing at least one network resource.

- 11 If the data center has folders, and you want to deploy new virtual instances to a folder, enter the folder path in the **Inventory Sub Path** field.

The system appends what you enter to the end of the **Inventory Full Path** entry, which initially contains the name of the data center, followed by `/vm`. New virtual instances are deployed to the last folder in the full path.

- 12 Click **Create** to add the new resource group to the system.

With a provider, zone, and resource group in place, you can begin adding other RealPresence Virtual Edition products to your vCenter environment. See [Next Steps](#).

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## Next Steps

After you have installed and configured the RealPresence Platform Director instance, activated licenses, and configured it for basic operation, you can begin setting up RealPresence component products for licensing and monitoring within the RealPresence Platform Director system.

In the *RealPresence Platform Director Administrator Guide*, see the following sections:

- *Manage and Configure the RealPresence® Platform Director™ Environment* for instructions on how to add RealPresence component products to your RealPresence Platform Director system.
- *Manage RealPresence Product Licenses* for instructions on how to allocate licenses to RealPresence component products and create license usage reports.
- *Monitor the RealPresence Platform Director Environment* for instructions on how to configure and use SNMP monitoring to monitor the health of RealPresence component products and the status of system resources and license usage.