



OPERATIONS GUIDE

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Polycom® RealAccess™

Cloud Edition



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Before You Begin

This document tells you how to use the Polycom® RealAccess™, Cloud Edition Service Delivery Platform to review the usage and performance of your Polycom collaboration network and administer some aspects of that network.

Overview of Polycom® RealAccess™, Cloud Edition Service Delivery Platform

The RealAccess, Cloud Edition Service Delivery Platform gives you actionable information about your Polycom collaboration solutions.

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

Audience and Purpose

This *Polycom RealAccess Cloud Edition Operations Guide* provides information primarily for two audiences:

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

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

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

Related Documentation

In addition to this guide, the available documentation that describes the RealAccess, On-Premises Service Delivery Platform includes:

- *Polycom RealAccess Cloud Edition Deployment Guide*
- *Polycom RealAccess Cloud Edition Release Notes*
- *Polycom RealAccess Offer of Source for Open Source Software*

Get Help

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

Polycom and Partner Resources

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

The Polycom Community

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

Getting Started

To get started with the Polycom® RealAccess™, Cloud Edition Service Delivery Platform, use this section to learn the following:

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

What is Polycom RealAccess, Cloud Edition Service Delivery Platform

The platform does the following:

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

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



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

Asset Management Reports

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

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

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

Details about Your Endpoints

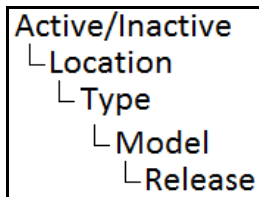
The platform provides the following details about the endpoints in your collaboration network:

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

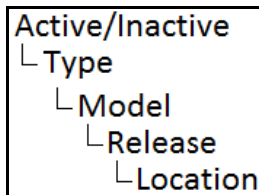
Custom Details You Want to See

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

- Starting with Location



- Starting with Type



Analytics Reports

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

Reports on Endpoint Usage and Meetings

You can find out the following types of information:

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

- Where the heaviest users are located.
- How the usage changes over time.

Reports on Call Errors

You can find out the following types of information:

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

Reports on Bridge Usage

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

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

Maintenance and customization

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

Customizing the platform

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

- MCUs.
- Locations.

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

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

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

Maintaining the Platform

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

- Add, update, and remove users.
- Add servers.
- Test and troubleshoot your connections to the DMA and Resource Manager.
- Manually load all inventory data from your Resource Manager.

Training Users on Collaboration Equipment

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

Training videos are available for the following endpoint equipment:

- Polycom® RealPresence® Group Series.
- Polycom® HDX®.
- Microsoft Lync 2010.
- Microsoft Lync 2013.
- Polycom® RealPresence® Desktop.
- Polycom® RealPresence® Mobile.
- Polycom® Touch Control.

Working in the RealAccess Service Delivery Platform

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

Log In

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

To log in:

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

Update Your Name, Time Zone and Photo

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

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

To update your name, time zone, and photo:

- 1 In the top-right corner of the RealAccess platform page, click your email address and click **User Profile**.
- 2 Select your time zone from the **Time Zone** drop-down list.
- 3 Click **Upload Photo** to locate and select a photo for your profile.
Most standard graphic formats are supported for your photo.
- 4 Confirm that your changes are correct and click **Save**.

View Tutorial Videos

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

To view tutorial videos:

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

RealAccess Analytics Reports

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



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

Calls, Meetings, and VMR Conferences

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

- **Call** — A call can be a participant call to a VMR, a point-to-point call between endpoints, or a point-to-point call needed to set up a conference, recording, or content-sharing.
- **Meeting** — A meeting is a point-to-point call between actual endpoints or a VMR conference. Meetings do not include point-to-point calls that are made to start recording or content-sharing.
- **VMR conference** — A Virtual Meeting Room (VMR) conference is a call made to set up a conference using a VMR code. VMR conferences do not include participant calls to a VMR.

Reviewing Conference Calls

Review Conference Utilization Trends Report

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

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

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

To review the Conference Utilization Report:

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

- 2 Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame.
- 3 In the **Select** drop-down list, select one of the following types of information you want the graph to display:
 - **Number of VMRs.**
 - **Minutes in VMRs.**
 - **Participants in VMRs.**
- 4 Click **Select All** or any one or combination of the following from the **Conference Type** drop-down list:
 - **VMR.**
 - **Scheduled.**
 - **RealConnect.**
 - **LYNC_CAA.**
- 5 In the **List View** at the bottom of the page, review data for individual conferences included in the selected time frame and filters.

Access More Details about a Room's Conferences

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

To access a Room ID's Conference Dashboard:

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

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.

For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your DMA.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Review Conference Dashboard

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

To review the Conference Dashboard:

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

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

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

View the Participants in a Conference

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

To view the participants in a conference:

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

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

Review Meeting Summary Report

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

- Count of meetings (based on incidences where a bridge is used).
- Hours of meetings.
- Averages for number of participants, meeting duration, and type of meeting or call type (audio or video).
- Call success rates.

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

To review the Meeting Summary Report:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Conference > Meeting Summary**.
- 2 Click the time frame you want in the **Period of Analysis** drop-down list.
- 3 Click one of the following options in the Calls drop-down list in the **Filters** section:
 - **All Calls**.
 - **Calls over 5 minutes**.
 - **Calls under 5 minutes**.

The counts in the graphs change based on your selections.

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

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

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

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

Customize the List View

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

To customize the List View:

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

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

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Reviewing Call and VMR Activity

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

Review Utilization Summary Report

You can review a summary dashboard with comprehensive call data of your network's usage. You can review the following information:

- See the total, duration, and maximum number of calls.
- Compare different aspects of your network (locations, endpoint system types, and more). For example, you can see which of the following are making the most calls:
 - Collaboration rooms.
 - Locations.
 - System types.
 - Models.
 - Combination of location and system type (Champions).
- View the trend of changes over time for the following:
 - Number of Calls.
 - Duration of calls.
 - Percentage of time rooms are used.
 - Number of VMR meetings.

To review the Utilization Summary Report:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Summary**.
- 2 Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame,
- 3 Click one of the following options in the Calls drop-down list in the **Filters** section:
 - **All Calls**.
 - **Calls over 5 minutes**.
 - **Calls under 5 minutes**.The counts in the graphs change based on your selections.
- 4 Click the appropriate option in the **Hours of Meetings/Duration of Meetings** drop-down list in the **Filters** section.
The **Highlights** graphs change based on your selection,
- 5 Check the **Trends | Last 30 Days** graphs at the bottom of the page to see a comparison of call traffic and meetings occurring in each of the last 30 days.

Print the report

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

To print the report:

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

Review Utilization Trends Report

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

To review the Utilization Trends Report:

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

- 5 In the **Model** drop-down list, click **Select All** or any single or combination of desired options.
The graph and **List View** change to reflect the filter selections you made.
- 6 In the **List View** at the bottom of the page, review data for individual calls included in the selected time frame and filters.

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.
For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your DMA.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Review Utilization Monthly Report

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

To review the Utilization Monthly Report:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Monthly**.
- 2 Next to the **System Type** graph, click **All Sites** or a desired location from the first drop-down list in the **Filters** section.
- 3 Next to the **System Type** graph, click the desired year from the second drop-down list in the **Filters** section. The default is the current year.
- 4 Next to the **Call Type** graph, click **All Sites** or a desired location from the first drop-down list in the **Filters** section.

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

Save the Data to a File

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

To save the data to a file:

Click **Export**.

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

Review Utilization List View Report

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

To review the Utilization List View Report:

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

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



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

Customize the List View

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

To customize the List View:

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

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Review Endpoint Dashboard

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

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



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

To review the Utilization Endpoint Dashboard:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Utilization > Endpoint Dashboard**.
- 2 From the **Type** drop-down list, select the system type for the endpoints you want to view.
- 3 From the **Site** drop-down list, select the location of the endpoints you want to view.
- 4 From the **Endpoints** drop-down list, select the model of endpoint you want to view.
- 5 Click a time frame in the **Period of Analysis** drop-down list to view calls that occurred in that particular time frame.
- 6 Click one of the following options in the Calls drop-down list in the **Filters** section:
 - **All Calls.**
 - **Calls over 5 minutes.**
 - **Calls under 5 minutes.**
- 7 In the **List View** at the bottom of the page, review information for individual calls included in the selected time frame and filters.

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.
For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your DMA.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Remotely Connect to the Endpoint Directly from the Endpoint Dashboard

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

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

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

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

Capacity Usage Reports

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

Review RMX Utilization Report

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

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

To review the RMX Utilization Report:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Capacity > RMX Utilization**.
The page displays two graphs on capacity usage, one for daily usage and the other for hourly usage.
- 2 For either graph, click a time frame in the **Period of Analysis** drop-down list to view usage that occurred in that particular time frame.
- 3 For either graph, change the selection in the **Resources** drop-down list to view capacity usage for video or audio ports only. The default **Capacity** includes all resources.
- 4 For either graph, select **Ports** in the **Utilization** drop-down list to view capacity usage based on the number of ports used.
You can compare the totals in the graphs with the total HD ports available as listed in the **RMX Capacity | Summary** table at the bottom of the page.
- 5 To review the maximum number of ports available on your MCUs, look at the **RMX Capacity | Summary** table at the bottom of the page.

Save the RMX Capacity Usage Data to a File

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

To save RMX capacity usage data to a file:

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

Review Concurrent Connections Report

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

To review the Concurrent Connections Report:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Capacity > Concurrent Connections**.
- 2 Click a time frame in the **Period of Analysis** drop-down list to view concurrent connections in a particular time frame.
- 3 In the **System Type** drop-down list, click **Select All** or any single or combination of desired options. The **Content** system type refers to endpoints that shared content on calls.
The graph and **List View** change to reflect the filter selections you made.
- 4 In the **List View** at the bottom of the page, review data for individual connections that occurred in the selected time frame and filters.

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.
For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your DMA.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Troubleshooting Endpoint Connections

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

Review Performance Summary

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

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

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

To review the Performance Summary Report:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Performance > Summary**.
- 2 Click a time frame in the **Period of Analysis** drop-down list to view errors that occurred in that particular time frame,
- 3 Click either **Source** or **Destination** in the **Filter** drop-down list to sort error counts based on whether the destination or the source had the error, For example, if you select **Destination**, then the **Site** graph shows the number of errors for each location when the endpoints at that location were destinations of attempted calls.

The data in the graphs change according to your selection.

Print the report

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

To print the report:

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

Review Performance Error Dashboard

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

- Locations.
- System types.
- User IDs.
- Endpoints.



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

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

To review the Performance Error Dashboard:

- 1 Display the **Performance | Summary** page and select options to display the data your want. See [Review Performance Summary](#).
- 2 From the **Disconnection Cause** list, click on an error type.
The **Performance Error Dashboard** appears.

- 3 Click a time frame in the **Period of Analysis** drop-down list to view errors that occurred in that particular time frame.
- 4 Click either **Source** or **Destination** in the **Filter** drop-down list to sort error counts based on whether the destination or the source had the error. For example, if you select **Destination**, then the **Site** graph shows the number of errors for each location when the endpoints at that location were destinations of attempted calls.
The data in the graphs change according to your selection.
- 5 In the **List View** at the bottom of the page, review data for individual errors included in the selected time frame and filters.

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.
For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your DMA.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Review Performance Trends Report

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

To review the Performance Trends Report:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Performance > Trends**.
- 2 Click a time frame in the **Period of Analysis** drop-down list to view errors that occurred in that particular time frame.
- 3 In the **Call Type** drop-down list, click **Select All** or any single or combination of desired options.
The graph and **List View** change to reflect the filter selections you made.

- 4 In the **System Type** drop-down list, click **Select All** or any single or combination of desired options. The graph and **List View** change to reflect the filter selections you made.
- 5 In the **Model** drop-down list, click **Select All** or any single or combination of desired options. The graph and **List View** change to reflect the filter selections you made.
- 6 In the **List View** at the bottom of the page, review data for individual calls included in the selected time frame and filters.

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.
For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your DMA.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Review Performance Network Report

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

To review the Performance Network Report:

- 1 Click **Analytics** in the lower navigation bar to launch the **Analytics** dashboard and go to **Performance > Network**.
- 2 Click a time frame in the **Period of Analysis** drop-down list to view issues that occurred in that particular time frame.
- 3 In the **Site** list, select one or more locations you want to see.
The graph and **List View** change to reflect the filter selections you made.

- 4 In the **System Type** drop-down list, click **Select All** or any single or combination of desired options. The **Content** system type refers to endpoints that shared content on calls.
The graph and **List View** change to reflect the filter selections you made.
- 5 From the **Network Flags** drop-down list, select either **Warning** or **Critical** to filter issues based on severity, **Critical** issues are issues that needs immediate attention. **Warning** issues are issues you need to know but you don't need to fix.
The counts related to the issues change based on your selections.
- 6 In the **List View** at the bottom of the page, review data for individual errors included in the selected time frame and filters. The errors are listed as packet loss (PL) and whether the loss occurred in transmission (**TX**) or receipt (**RX**).

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.
For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your Resource Manager.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Customizing Analytics Reports

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

Eliminate Duplicate Endpoints in Reports

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



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

To eliminate two listings of the same endpoint:

- 1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.
- 2 In the **Endpoint Grid** list, find the system name of the endpoint, normally the new endpoint, you want to appear in future reports. This endpoint is considered the *master*.
- 3 Note the number in **Id** column for the master endpoint. This number is the globally unique identifier (GUID) for that endpoint.
- 4 In the **Enter Endpoint Master Guid** field, enter the GUID of the master endpoint.



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

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

Hide Individual Endpoints from Reports

You can prevent, or allow, specific endpoint assets from being included in the various RealAccess reporting pages. You might choose to hide some endpoints in order to make your asset metrics and reports more

useful for you. For example, if the assets don't work at all or were very recently added, the assets' call data might skew data you are preparing for a management report.

To hide individual endpoints in report data:

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



The column with the **Edit** option may be hidden on your screen due to browser limitations. To display the **Edit** button, scroll to the right with your keyboard's arrow keys or with the scroll bar at the bottom of the page. You can also use **Edit Columns** to hide some columns of data and bring the Edit button into view.

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

Change the System Type for Individual Endpoints

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

To change the system type for individual endpoints:

- 1 Click **Admin** in the lower navigation bar to launch the Administrator dashboard and go to **Setup > Asset Management**.
- 2 In the **Endpoint Grid** list, locate the endpoint you want to update, and click **Edit**.
- 3 Select an option from the drop-down menu in the **L2 System Type** column to override the administered System Type shown in the **Type** column.
- 4 Click **Update**.

Specify the MCU Type for Correct Port Reporting

The RealAccess platform calculates the ports available on your MCUs based on how the MCU is administered. However, by default, these calculations are also based on the maximum ports available on legacy RMX products such as an RMX2000. If an MCU uses an MPMRX card or is a RealPresence Collaboration Server Virtual Edition, you must tell the RealAccess platform that the MCU is one of these two types. If you do not, the RealAccess platform assumes the MCU to be a legacy MCU and does not accurately report the number of ports available.

To specify the MCU type for correct port reporting:

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

Remove an MCU from Analytics

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

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

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

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

- 1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Dictionaries > MCU Friendly Name**.
- 2 In the **Setup | MCU Friendly Name** page, find the old or removed MCU name, and click **Edit**.
- 3 In the **Hide by default** column, click the check box.
- 4 Click **Update**.

User-Friendly Aliases

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

Assign an MCU Alias

Give your MCUs more recognizable names in the RealAccess reports.

To configure an MCU alias:

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

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

Assign a Site Alias

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

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

To configure a site alias:

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

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

- 4 Click **Update**.

Asset Management Reports

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



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

Review Assets List View Report

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

To review the Assets List View Report:

- 1 Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Assets > List**.
- 2 Scroll the list to find the endpoints you want to review.

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.
For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your DMA.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Review Assets Site Report

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

- Type.
- Model.
- Software version.

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

To review the Assets Site Report:

- 1 Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Assets > Site**.
- 2 In the **Count of Active systems** list, click **Active** (default) or **Inactive**.
The locations with systems that match your choice appear in the **Systems by site** list, with the location with the highest number of systems listed first by default, and the remaining lists showing progressively more precise endpoint details for that location.
- 3 From the **Systems by site** list, click the location whose endpoint metrics you want to see.
- 4 From the **<Active Status> in <Location> by type** list, click the endpoint type you want to see.
- 5 From the **<Active Status> <Type> in <Location>** list, click the endpoint model you want to see.
The latest software version available for that endpoint model appears in the **Latest Polycom Software Release** field.
- 6 Click the specific software version you want to see.
The endpoint list at the bottom of the page displays specific endpoints based on your selections in the previous steps.

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.

For descriptions of the call characteristics in **List View**, see the inventory report descriptions in the Operations Guide for your Resource Manager.

- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Review Assets Models Report

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

- Model.
- Software version.
- Location.

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

To review Assets Models Report:

- 1 Click **Analytics** in the lower navigation bar to launch the Analytics dashboard and go to **Assets > Models**.
- 2 In the **Count of Active systems** list, click **Active** (default).
The endpoint types appear in the **Active systems by type** list.
- 3 In the **Count of Active systems** list, click **Active** (default) or **Inactive**.
The endpoint types that match your choice appear in the **Active systems by type** list, with the type with the highest number of systems listed first by default, and the remaining lists showing progressively more precise endpoint details for that type.
- 4 From the **<Active Status> systems by type** list, click the endpoint type you want to see.

- 5 From the **<Active Status> <Type>** list, click the endpoint model you want to see.
The latest software version available for that endpoint model appears in the **Latest Polycom Software Release** field.
- 6 From the **Software Release** list, click the software release you want to see.
The locations that have the selected endpoint model and software release are listed in the **Site** list.
- 7 From the **Site** list, click the location you want to see.
The endpoint list at the bottom of the page displays specific endpoints based on your selections in the previous steps.

Customize the List View

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

To customize the List View:

- 1 Click **Edit Columns**.
- 2 Click the checkbox to select each option you want to include.
For descriptions of the call characteristics in **List View**, see the call detail records (CDR) descriptions in the Operations Guide for your DMA.
- 3 Click the checkbox on any previously-selected option you want to hide.
- 4 Click a column header to sort the calls listed based the data values in that column.

Save the List View Data to a File

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

To save the List View data to a file:

Click **Export**.

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

Review Assets Map





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



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

To review your endpoint assets on a map:

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

- 2 Click **Select All** or any single or combination of desired options in the **System Type** list.
- 3 In the State drop-down list, click **All** or one or more of the following:
 - **Off-line** — Include inactive endpoints.
 - **On-line** — Include active endpoints.
 - **On-Call** — Include endpoints that were on a call at the last 5-minute update.
- 4 Select one of the following page refresh options:
 - **Refresh off**
 - **30 secs**
 - **1 min**
 - **5 min**
- 5 Review the map for the concentrations of the endpoint types you have identified. The number in each circle indicates the number of endpoints that match your criteria at that location. The circles on the map indicate the following for a particular location on the map:
 - Large circle  — a high number of endpoints.
 - Small circle  — a low number of endpoints.
 - Red circle  — at least one endpoint is offline (inactive).
 - Green circle  — all endpoints are online (active).
- 6 Click on a circle to see the percentage of endpoints that are online and a list of endpoints by name.
- 7 In the list of endpoints, roll your cursor over an endpoint to get the following details about that endpoint:
 - Type
 - Model
 - Release
 - Site
- 8 In the list of endpoints for a location, click on an endpoint name to display that endpoint's dashboard, which displays call activity for that endpoint.

Display a List of All Locations

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

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

Reset the Assets Map

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

Click **Reset Zoom**.

Tracking Endpoints by Departments

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



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

Create a Department

Create departments to organize your endpoints.

To create a Department:

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

Assign an Endpoint to a Department

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

To assign an endpoint to a department:

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



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

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

Account Management

You can manage accounts in the RealAccess Service Delivery Platform as follows:

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

Managing Customer Information

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

Edit a Customer Account

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

To edit a customer account:

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

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

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

4 Click **Update**.

Managing User Accounts

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

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

You can assign the following roles to users.

RealAccess User Roles

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

Add a User Account

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



If your platform uses SSO, you cannot add users.

To add a user account:

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

- 2 In the **Setup | Users Setup** page, click **Create New User**.
- 3 Add the information required for the following fields:

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

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

Edit a User Account

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

To edit a user account:

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

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

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

Reset a Password

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

To reset a password:

- 1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Users**.
- 2 In the **Setup | Users Setup** page, choose a user and click **Reset Password**.
A message indicates that a reset password email has been sent to the user.

Delete a User Account

You can delete a user account from your RealAccess platform.

To delete a user account:

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

System Configuration

You can configure the Polycom® RealAccess™, Cloud Service Delivery Platform to do any or all of the following:

- Account for changes or additions to the DMA or Resource Manager.
- Configure messages you and your users receive when performance thresholds are exceeded or errors occur.

Managing Your Resource Manager and DMA

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. Connecting with more than one DMA or Resource Manager can add reliability to RealAccess monitoring because if the connection to one DMA is dropped, the RealAccess platform still can collect data from the other DMA.

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

Add a DMA or Resource Manager

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

To add a DMA or Resource Manager:

- 1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Agent**.
- 2 In the **Setup | Agent** page, choose one of the following:
 - **Add a new DMA.**
 - **Add a new RPRM.**
- 3 Add the information required for the following fields:

Field	Description
IP Address	The IP address of the server, either the DMA or Resource Manager. Use the virtual IP address if you are connecting to a redundant configuration.

Field	Description
User Name	The user name administered on the server for the RealAccess platform to use to connect. The user account must have a minimum of auditor and provisioning roles.
Password	The password the RealAccess platform should use to connect to the server.

- 4 Click **Update**.

Edit a DMA or Resource Manager

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

To edit an infrastructure product:

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

Delete a DMA or Resource Manager

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

To delete a DMA or Resource Manager

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

Managing Notifications

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

Configure Notification Email

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



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

To configure notification email:

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

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

- 3 Click **Update**.

Configure a Connection Notification

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

To configure a connection notification:

- 1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Notifications**.
- 2 In the **Setup | Connections to RealAccess** section, click **Add Notification**.
- 3 In the **Email** field, add an email address that should receive connection notifications.
- 4 Click **Update**.

Configure an MCU Capacity Notification

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

To configure an MCU capacity notification:

- 1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Notifications**.
- 2 In the **Setup | MCU Capacity** section, click **Add Notification**.
- 3 In the **Email** field, add an email address to receive the notification.

- 4 In the **Audio Percent** field, use the up and down arrows to adjust the percentage of the audio-ports-in-use threshold.
- 5 In the **Video Percent** field, use the up and down arrows to adjust the percentage of the video-ports-in-use threshold.
- 6 In the **MCUs** drop-down list, select the MCU to which the threshold should apply.
- 7 Click **Update**.

Configure an Error Notification

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

To configure an error notification:

- 1 Click **Admin** in the lower navigation bar to launch the **Admin** page and go to **Client Config > Notifications**.
- 2 In the **Setup | Errors** section, click **Add Notification**.
- 3 In the **Email** field, add an email address to receive the notification.
- 4 In the **Wildcard** field., add a string of character(s) that, when included in an error message, will generate a notification.

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

- 5 Click **Update**.

System Maintenance

The RealAccess, Cloud Edition Service Delivery Platform helps you maintain your platform with the following capability:

- Manual retrieval of your complete endpoint inventory

Manually Retrieve Your Complete Endpoint Inventory

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

To manually retrieve a complete inventory:

- 1 Click **Support** in the lower navigation bar to launch the Support page and go to **Status**.
- 2 Click **Request RM Inventory**.
The RealAccess platform begins pulling the asset inventory from RealPresence Resource Manager.
- 3 Check your **Asset Management List View Report** to see if the endpoints you expect to see have been retrieved.

Troubleshooting RealAccess Connections

The Polycom® RealAccess™, Cloud Service Delivery Platform provides troubleshooting tools to help you do the following:

- Check connections between the RealAccess platform itself and the collaboration network.

Check Connections to the DMA and Resource Manager

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

To check connections to the DMA and Resource Manager:

- 1 Click **Support** in the lower navigation bar to launch the **Support** page and go to **Status**.
- 2 Click **Test All Connections**.

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

- 3 Wait until the processing bar stops running.

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

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