



**GETTING STARTED GUIDE**

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# **Polycom RealPresence DMA System**



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# About This Guide

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This guide provides the first time setup information that you need to configure a RealPresence DMA system. Once you've completed first time setup, see the *Polycom RealPresence DMA System Operations Guide* for additional configuration and customization tasks you can perform.

## RealPresence DMA System Editions

The RealPresence DMA system is available in an Appliance Edition (for use with a Polycom Rack Server) and a Virtual Edition (packaged as software only).

Most of the functionality described in this document applies to both editions, and so the product references are general-that is, the RealPresence DMA system. However, when information applies to a specific edition, the reference will be specific - that is, RealPresence DMA, Virtual Edition or RealPresence DMA, Appliance Edition.

## Audience, Purpose and Required Skills

This document is written for a technical audience. You must know or have the following:

- Basic computer and network system administration skills
- Virtual machine (VM) concepts
- Network configuration, including IP addressing, subnets, gateways, domains, DNS, time servers, and possibly network routing
- The deployment plan for the RealPresence DMA system being installed and the video conferencing/collaboration network of which it will be a part

This guide assumes that you are starting with a RealPresence DMA system that has never been previously configured.

If necessary, obtain the assistance of the appropriate IT or network administration personnel before proceeding.

## Get Help

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

## Polycom and Partner Resources

In addition to this guide, the following documents provide details about the RealPresence DMA system. To access these documents, go to [support.polycom.com](https://support.polycom.com).

- *Polycom RealPresence DMA System Release Notes*  
Provides information you need to know about the specific release of the system you're deploying.
- *Polycom RealPresence DMA System Operations Guide*  
Provides more detailed and specialized configuration, operation, and administration information you need to know when using the RealPresence DMA system.
- **Online help** -In the management interface, select **Help > Help Contents** to access the entire help system, or click the **Help** button in any dialog to see the specific help topic for that location.
- **Partner product interoperability** - Refer to the partner deployment guides.
- **Specific certifications** - Refer to:

[www.polycom.com/solutions/solutions-by-industry/us-federal-government/certification\\_accreditation.html](https://www.polycom.com/solutions/solutions-by-industry/us-federal-government/certification_accreditation.html)

## 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.

# Prepare for System Installation

The sections that follow describe the steps required to perform the initial installation and setup of a system including:

- [Complete the First-Time Setup Worksheet](#)
- [Prepare Client Systems](#)
- [Prepare the USB Flash Drive \(Appliance Edition Only\)](#)
- [Install the Polycom RealPresence Platform Director System](#)

The following information describes the steps required to perform the initial installation and setup of a RealPresence DMA system. After following these steps, you will have successfully deployed the system and will be ready to finish configuring it.

The tasks required to complete the system configuration are described in the online help or the *Polycom RealPresence DMA System Operations Guide*, available for download from [support.polycom.com](http://support.polycom.com).

## Complete the First-Time Setup Worksheet

Before you begin system setup, fill out the applicable fields in the My System Values column of the following worksheet.

Network configuration of an appliance (hardware-based) RealPresence DMA system involves options and settings not relevant in a virtual deployment, including dual-server configuration and split management and signaling networks. Although those settings are present in the RealPresence DMA system management interface's Network Settings page, they must not be used in a virtual deployment. They are clearly identified in the following worksheet.

As part of the deployment process, the RealPresence Platform Director system will automatically configure some of the RealPresence DMA system's network and time settings. You can configure other system settings via the RealPresence DMA system web UI after deployment is complete.

### First-Time Setup Worksheet

Configuration Information	My System Values	Description
System IP type		Specify whether the system should support IPv4, IPv6, or both. If both, complete all the IP address information below. If only IPv4 or IPv6, complete only the corresponding fields below.

**First-Time Setup Worksheet (continued)**

Configuration Information	My System Values	Description
System server configuration		<p>Specify whether you're installing a single-server system or a two-server system. For a single-server system, the Server 2 section below is not used.</p> <p>If you received two servers, be sure you've read and understood the cautions regarding configuration and setup and know whether you're setting up a co-located two-server cluster or two separate single-server systems.</p> <p>Virtual Edition deployments <b>must</b> be single-server systems.</p>
System split network setting		<p>Specify whether to combine or split the system's management and signaling interfaces. If the same network will be used for both management (administrative access) and signaling, the signaling IP addresses and Shared Signaling Network Settings section below are not used.</p> <p>Virtual Edition systems <b>must</b> combine the system's management and signaling interfaces.</p> <p><b>Caution:</b> Choose split networking <b>only</b> if you need to restrict access to the management interface and SNMP to users on an isolated non-public network separate from the enterprise network. Typically, this is the case only in high-security environments.</p> <p>In most network environments, users accessing the management interface are on the same enterprise network as endpoints and other devices communicating with the system, and they use the same physical and virtual IP addresses and the same network interface.</p> <p>To split the network configuration, you must use different gateways and subnets for management and signaling, and separate physical connections for the management and signaling networks (eth0 for management, eth2 for signaling). In a split network configuration, routing rules are necessary for proper routing of network traffic.</p> <p>If management and signaling traffic are combined on the same network (subnet), both use the same physical and virtual IP addresses and the same network interface.</p> <p>If you are not sure whether split networking is appropriate, possible, or necessary for this installation, consult the appropriate IT staff or network administrator for your organization.</p>
<b>Server 1</b>		<p>Only the Server 1 settings are used for Virtual Edition deployments.</p>



## First-Time Setup Worksheet (continued)

Configuration Information	My System Values	Description
Management host name		Local host name of the server's combined interface. Host names may contain only letters, numbers, and internal dashes (hyphens), and may not include a domain. The reserved values appserv* and dmamgk-* may not be used for host names. The host name is combined with the domain name specified under <b>General System Network Settings</b> to form the fully qualified domain name (FQDN).
Management IPv4		Static, physical IP address(es) for the first (or only) server's management (or combined) interface.
Management IPv6		
Signaling IPv4		Static, physical IP address(es) for the first (or only) server's signaling interface (if networking is split). Not used for Virtual Edition deployments.
Signaling IPv6		
<b>Server 2</b>		These settings are not used for Virtual Edition deployments.
Host name		Local host name of the second server's management (or combined) interface. Host names may contain only letters, numbers, and internal dashes (hyphens), and may not include a domain. The reserved values appserv* and dmamgk-* may not be used. The host name is combined with the domain name specified under <b>General System Network Settings</b> to form the fully qualified domain name (FQDN).
IPv4		Static, physical IP address(es) for the second server's management (or combined) interface.
IPv6		
Signaling IPv4		Static, physical IP address(es) for the second server's signaling interface (if networking is split).
Signaling IPv6		
<b>Shared Management Network Settings</b>		In the combined network configuration (required for Virtual Edition deployments), users accessing the management interface are on the same network as endpoints and other devices communicating with the system, and these settings are used for both management and signaling.

## First-Time Setup Worksheet (continued)

Configuration Information	My System Values	Description
Virtual host name		For a two-server system or a single-server system in IPv6-only mode, the local host name of the virtual management host. Not used for a single-server system with IPv4 enabled. Host names may contain only letters, numbers, and internal dashes (hyphens), and may not include a domain. The reserved values appserv* and dmamgk-* may not be used for host names. The host name is combined with the domain name specified under <b>General System Network Settings</b> to form the fully qualified domain name (FQDN).
Virtual IPv4		For a single-server system in IPv6 only mode, the IP address(es) of the virtual management host. Not used for a single-server system with IPv4 enabled.
Virtual IPv6		
Subnet mask		IPv4 network mask that defines the subnetwork of the system's management interface.
IPv6 prefix length		IPv6 CIDR (Classless Inter-Domain Routing) prefix size value (the number of leading 1 bits in the routing prefix mask) that defines the subnetwork of the system's management interface.
IPv4 gateway		IP address of the gateway server used to route network traffic outside the subnet.
Management Link		
Auto-negotiation		Yes or no. If no, indicate speed and full or half duplex. <b>Note:</b> Auto-negotiation is required if your network is 1000Base-T.
LAN Security Settings		These settings are not used for Virtual Edition deployments. <b>Caution:</b> In a network that requires 802.1x authentication for servers (this is rarely the case), incorrect settings in this section and, if applicable, lack of the proper certificate(s) can make the system unreachable. Recovering from this situation requires connecting a laptop to the system using a crossover cable in order to access it.

## First-Time Setup Worksheet (continued)

Configuration Information	My System Values	Description
Enable 802.1x		Enables the system to authenticate this network interface to the LAN. Depending on the authentication method, the access credentials required may be either a user name and password (specified below) or a security certificate. If you are deploying a Virtual Edition system, do <b>not</b> select <b>Enable 802.1x</b> .
User name		The user name with which the system may authenticate this interface.
Password Confirm password		The password for the user name entered above.
EAP Method		The Extensible Authentication Protocol method used to establish trust with the authentication server (this is also known as the outer authentication protocol).
Protocol		When a TLS tunnel is established with the authentication server, the protocol used within the tunnel (this is also known as the inner authentication protocol).
<b>Shared Signaling Network Settings</b>		These settings are not used for Virtual Edition deployments. For Appliance Edition deployments: The settings in this section are enabled only if management and signaling traffic are on separate networks. If so, they apply to the entire system (both servers in two-server configuration). For a one-server configuration, the virtual host name and IP fields are disabled. (Exception: If only IPv6 is enabled, the system must have two addresses, so a single-server system must still have a virtual host name and IP address.) The settings are the same as those in <b>Shared Management Network Settings</b> , except that under Signaling Link, the signaling network interface (eth2) can be disabled. This capability exists for debugging purposes.
<b>General System Network Settings</b>		
DNS search domains		One or more fully qualified domain names, separated by commas or spaces. The system domain you enter below is added automatically, so you need not enter it.

## First-Time Setup Worksheet (continued)

Configuration Information	My System Values	Description
DNS 1		IP addresses of up to three domain name servers. At least one DNS server is required. Your system must be accessible by its host name(s), not just its IP address(es), so you (or your DNS administrator) must create A and/or AAAA records for IPv4 and IPv6, respectively, as well as the corresponding PTR records, on your DNS server(s). A/AAAA records and PTR records that map each physical host name to the corresponding physical IP address and each virtual host name to the corresponding virtual IP address are mandatory, as are the corresponding PTR records that allow reverse DNS resolution of the system's physical or virtual host name(s).
DNS 2		
DNS 3		
Domain		The domain for the system. This is combined with the host name to form the fully qualified domain name (FQDN). For instance: Host name: <code>dma1</code> Domain: <code>callservers.example.com</code> FQDN: <code>dma1.callservers.example.com</code>
Signaling DSCP		The Differentiated Services Code Point value (0 - 63) to put in the DS field of IP packet headers on outbound packets associated with signaling traffic. The DSCP value is used to classify packets for quality of service (QoS) purposes. If you're not sure what value to use, leave the default of 0.
Management DSCP		The Differentiated Services Code Point value (0 - 63) to put in the DS field of IP packet headers on outbound packets associated with management traffic. The DSCP value is used to classify packets for quality of service (QoS) purposes. If you're not sure what value to use, leave the default of 0.
Default IPv6 gateway		The IPv6 gateway's address and the interface used to access it, generally eth0, specified as: <code>&lt;IPv6_address&gt;%eth0</code>
Default IPv4 gateway		Not used for Virtual Edition deployments, which must combine the system's management and signaling interfaces and thus have only one IPv4 gateway specified.
<b>System Time</b>		In Virtual Edition deployments, some of the System Time settings are automatically configured as part of the installation process.

**First-Time Setup Worksheet (continued)**

<b>Configuration Information</b>	<b>My System Values</b>	<b>Description</b>
Time zone		Time zone in which the system is located. We strongly recommend selecting the time zone of a specific geographic location (such as America/Denver), not one of the generic GMT offsets (such as GMT+7). If you do use a generic GMT offset (for instance, to prevent automatic daylight saving time adjustments), note that they use the Linux/Posix convention of specifying how many hours ahead of or behind local time GMT is. Thus, the generic equivalent of America/Denver (UTC-07:00) is GMT+07, not GMT-07.
NTP server #1		IP address of the primary NTP time server. Use of time servers is strongly recommended. All the devices in your video conferencing deployment should use the same time servers to avoid potential problems caused by time differences among devices.
NTP server #2		IP address of a second NTP time server (optional, but strongly recommended).
NTP server #3		IP address of a third NTP time server (optional, but strongly recommended).
<b>Routing Configuration</b>		Special routing rules are generally not needed in the combined network configuration, which is required in Virtual Edition deployments. In a split network configuration, routing rules are necessary for proper routing of network traffic. If you aren't sure, consult the appropriate IT staff or network administrator for your organization.
Host/network		The IP address of the destination network host or segment.
Prefix length		The CIDR (Classless Inter-Domain Routing) value that, together with the destination host/network address, defines the subnet for this route. For IPv4, a prefix length of 24 is equivalent to specifying a subnet mask of 255.255.255.0. A prefix length of 16 is equivalent to specifying a subnet mask of 255.255.0.0.
Interface		Specify the interface for this route. In the combined network configuration required in Virtual Edition deployments, this is eth0.

**First-Time Setup Worksheet (continued)**

Configuration Information	My System Values	Description
Via		IP address of router for this route. Optional and only needed for non-default routers.

## Prepare Client Systems

You will need a client system running Microsoft® Windows® to install the RealPresence DMA, Appliance Edition, system software. You will also need the client system to log in to the RealPresence DMA web user interface after you install the software on your server or create a virtual instance.

The Windows client system needs the following hardware and software:

- Hardware
  - 1280x1024 (SXGA) minimum display resolution; 1680x1050 (WSXGA+) or greater recommended
  - Ethernet port (Appliance Edition only) or wireless network access
  - DVD-RW drive or an external DVD burner
- Software
  - Microsoft Windows® Operating System (required for the USB Configuration Utility)
  - Web Browser: Microsoft Internet Explorer® 7 or newer, Mozilla Firefox® 3 or newer, or Google Chrome™ 11 or newer
  - Adobe® Flash® 9.0.124 or newer

## Prepare the USB Flash Drive (Appliance Edition Only)

You must configure the RealPresence DMA system, Appliance Edition server(s) using the RealPresence DMA system USB Configuration Utility (available in the /usb-gui directory of the system recovery disc and at [support.polycom.com](http://support.polycom.com)) and the USB flash drive included in the server package.

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### **Caution: Use the latest version of the RealPresence DMA system USB Configuration Utility**

For compatibility reasons, ensure that you use the latest version of the RealPresence DMA system USB Configuration Utility.

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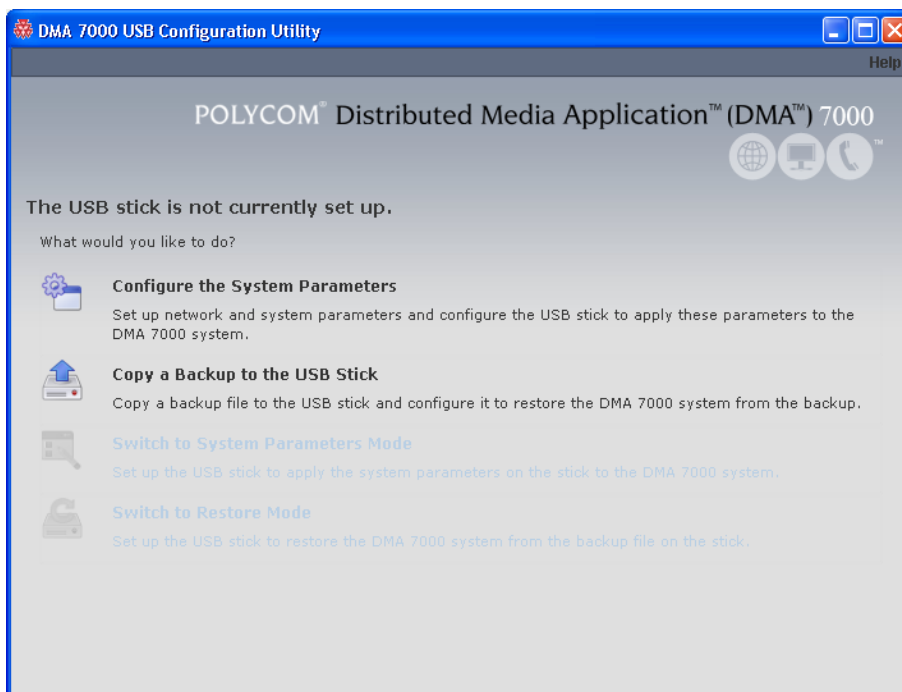
Note that if for some reason you are not able to use the USB Configuration Utility, you can configure your system servers without using it. See [Install the System Software](#) for more information.

## TASK

- 1 Connect the blank USB flash drive to the Windows PC on which you put the ZIP file containing the RealPresence DMA system USB Configuration Utility.

Note that the USB Configuration Utility files must be at the root of the drive, not in a folder. One of the files is autorun.inf, which enables the USB Configuration Utility to start automatically when the USB flash drive is inserted into a PC that supports autorun. In a highly secure environment, this file may not be allowed.

- 2 Unzip the RealPresence DMA> system USB Configuration Utility files to the USB flash drive.
- 3 Start the USB Configuration Utility by double-clicking **dma7000-usb-gui.exe**.
- 4 In the **USB Configuration Utility** window, click **Configure the System Parameters**.



- 5 On the **Network** page, select the **System IP type**, **System server configuration**, and **System split network setting** that you specified on the [First-Time SetupWorksheet](#).

Note that the settings you choose for these items determine which of the remaining network value fields are enabled. For instance, if you specify a single-server configuration, the Server 2 fields are disabled.

Be sure you have read and understand the cautions regarding supercluster configurations and two-server configurations at the beginning of this document.

- 6 Enter the network values from the [First-Time SetupWorksheet](#).

If you need to set up a special network routing rule or rules, click **Routing Configuration**, create the rule(s), and click **OK**. In the usual combined network configuration, routing rules are generally not necessary. In a split network configuration, routing rules are necessary for proper routing of network traffic. If you are not sure what rule or rules you need, consult the appropriate IT staff or network administrator for your organization.

- 7 Click **Next**.

- 8 On the **System Time** page, select the correct **System time zone** for your location.  
Polycom recommends that you select the best location-specific setting, not one of the generic GMT offset settings. The location-specific settings automatically include the correct daylight saving time adjustments (if any) for that location and will be updated as locales change their time policies in the future.
- 9 Under **NTP servers**, enter the IP addresses (or domain names) for the time servers from the [First-Time SetupWorksheet](#).  
Polycom recommends specifying at least one and preferably three time servers. Use NTP stratum 3 quality time servers if possible. At least one time server must be specified before creating or joining a supercluster.
- 10 Click **Done**.  
The utility confirms that the configuration file was created and returns you to the initial menu.
- 11 Verify that **The USB stick is set to apply system parameters** is displayed in the initial menu, as shown next.



- 12 Close the program.
- 13 On your PC, eject the USB flash drive.  
When a message tells you it's safe to do so, disconnect the USB flash drive from the PC.



# Install the Polycom RealPresence Platform Director System

Polycom® RealPresence Clariti™ customers and Virtual Edition customers must use the Polycom® RealPresence® Platform Director™ system to license the products. The RealPresence Platform Director system is available for download from **Documents and Downloads** at [Polycom\\_Support](#).

For complete instructions on how to use the RealPresence Platform Director system, see the *RealPresence Platform Director System Getting Started Guide*.

# System Installation

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The RealPresence DMA system is available in either a Virtual Edition or an Appliance Edition. This section includes the following topics:

- [Virtual Edition Installation](#)
- [Appliance Edition Installation](#)

## Virtual Edition Installation

Polycom recommends that a virtual environment administrator install Virtual Edition software. After the installation of a Virtual Edition, additional configuration should be done by someone who understands video conferencing.

You will need to do the following to install the RealPresence DMA system, Virtual Edition in your virtual environment. After following these steps, you will have successfully logged in to the RealPresence DMA system and will be ready to finish configuring the system.

- Review the *Polycom RealPresence DMA System Release Notes* to ensure that your host machine has the capacity for your planned Virtual Edition system deployment
- Review the [Host Installation Guidelines for Virtual Editions](#)
- [Install the Polycom RealPresence Platform Director System](#)
- [Install the Virtual Edition Software](#)

## Host Installation Guidelines for Virtual Editions

Before deploying your Polycom RealPresence virtual edition software, review the following planning guidelines for your deployment.

Polycom recommends that a virtual environment administrator install Virtual Edition software. After the installation of a Virtual Edition, additional configuration should be done by someone who understands video conferencing.

Polycom recommends the following guidelines:

- [CPU Allocation](#)
- [Memory Allocation](#)
- [Disk](#)

### CPU Allocation

- Leave 2 cores unallocated, regardless of the number of cores present, how many licenses are purchased, and what other virtual machines will be present.

- For VMware, do not allocate CPU core 0. Host operating system performance may be affected if this core is assigned to the virtual machine.
- When possible, allocate cores on one CPU. This will enhance performance by reducing CPU-to-CPU communication times.
- Do not use processor oversubscription; maintain a 2:1 ratio of virtual CPU to physical CPU. For example, a system with 8 physical cores can support up to 16 virtual processors divided up into any combination among the virtual machines running on that host.
- When you are using Hyper-V, Polycom recommends disabling the Virtual Machine Queue of the Network Interface Card (NIC). For more information, see <https://support.microsoft.com/en-us/kb/2902166>

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**Note:** CPU reservations can only be done after shutting down the virtual machine.

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## Memory Allocation

In a Microsoft Hyper-V environment, you must not overprovision memory at the hypervisor layer. Dynamic memory for virtual machines is not supported.

## Disk

Hypervisors add overhead to disk operations. For best performance, ensure that the virtual machine is able to achieve the recommended IOPS listed in the following table.

	Lab Environment	Production Environment
<b>Disk Performance</b>	170 Random IOPS (write) 170 Random IOPS (read)	230 Random IOPS (write) 450 Random IOPS (read)
<b>Network</b>	1GB Shared	1GB Dedicated 10GB Shared

Capacity information such as storage space and memory varies according to virtual edition. Please see release notes for your RealPresence virtual edition software for the minimum capacity requirements for your product.

## Install the Virtual Edition Software

You can install your Virtual Edition software either with your native tools or with the RealPresence Platform Director system, depending on your environment.

If your RealPresence Platform Director system was installed in a VMware vCenter environment with the required credentials, you can use the RealPresence Platform Director system to deploy Polycom software. For complete instructions on how to use the RealPresence Platform Director system see the *Polycom RealPresence Platform Director Administrator Guide*.

You cannot use the RealPresence Platform Director system to deploy a Hyper-V Virtual Edition. For a Hyper-V Virtual Edition, you must deploy the software using Hyper-V tools and then add the instance to the RealPresence Platform Director system.

Choose from the following installation methods:

- [Install RealPresence DMA, Virtual Edition Software with Your Virtual Environment Tools](#)
- [Install the RealPresence DMA System Software Using the RealPresence Platform Director System](#)

## Install the RealPresence DMA System Software Using Your Virtual Environment Tools

If you install the RealPresence DMA, Virtual Edition, using your virtual environment tools, you will still need to use the RealPresence Platform Director system to manage licensing of your Polycom software.

If installing a Hyper-V version, you must use the **Copy** option.

### TASK

- 1 Refer to the documentation for your virtual environment tools for instructions on installing a virtual instance.
- 2 Install an instance of the RealPresence DMA, Virtual Edition.
- 3 Assign a static IP address to the instance using the console if your VM environment does not use DHCP.
- 4 Add the instance to the RealPresence Platform Director system. See the *RealPresence Platform Director Administrator Guide* for details.

## Assign a Static IP Address

The RealPresence DMA system requires a static IP address for your system's instance. If your VM environment is not using DHCP, you must assign a static IP with the console before continuing to configure your system. If your VM environment has a DHCP server, it will assign an IP address to the instance. You can then assign a static IP using the console or assign the static IP from the RealPresence DMA system's web interface during initial configuration.

### TASK

- 1 In the VM client, select the instance you installed.
- 2 Select the **Console** tab.
- 3 Click in the console window, press **Enter** if necessary to see the login prompt, and log in with user ID **polycom** and password **polycom**.

#### **Password characteristics**

The first time you log in to the restricted console, you are required to change the password for the **polycom** account. Use a password with the following characteristics:

- At least 6 characters in length
  - Not a dictionary word
  - Not a palindrome (spelled the same forward and backward)
  - Not simply a case change of the previous password
  - Not a letter rotation of the previous password (**plycom** -> **mpolyco**)
- 4 Change the password for the **polycom** account, following the above password guidelines.  
A shell interface appears that enables you to assign an IP address.

- 5 Follow the prompts and assign the IP address you specified in the First-Time Setup Worksheet. The system restarts some services and ends your console session.
- 6 Press **CTRL + ALT** to release the cursor from the console.
- 7 Close the console window.

## Install the RealPresence DMA System Software Using the RealPresence Platform Director System

If your RealPresence Platform Director system was installed in a VMware vCenter environment with the required credentials, you can use the RealPresence Platform Director system to deploy Polycom software. For complete instructions on how to use the RealPresence Platform Director system see the *Polycom RealPresence Platform Director Administrator Guide*.

You cannot use the RealPresence Platform Director system to deploy a Hyper-V Virtual Edition. For a Hyper-V Virtual Edition, you must deploy the software using Hyper-V tools and then add the instance to the RealPresence Platform Director system.

- » Install an instance of the RealPresence DMA, Virtual Edition, according to the instructions in the Polycom RealPresence Platform Director Administrator Guide.

## Log in to the RealPresence DMA system, Virtual Edition

You need to log in to your RealPresence DMA system, Virtual Edition to continue system configuration.

### TASK

- 1 Be sure the RealPresence DMA system is powered on and running.
- 2 Open a web browser and enter the URL of the system in the address bar:  
>**https://<IP address>:8443/dma7000/**
- 3 Enter the administrator **Username** and **Password**.  
The factory default is **admin/Polycom12#\$**.
- 4 Continue to [Initial Configuration](#).

## Appliance Edition Installation

If you have ordered an Appliance Edition, you need to set up the appliance. If the RealPresence DMA system software is not pre-installed on your server, you need to download the software from the Polycom support site and create a DVD to install the software on your server.

- Review the *Polycom RealPresence DMA System Release Notes*.
- [Verify Shipment Contents](#)
- [Unpack and Install the Hardware](#)
- [Create a DVD for the System Software](#)
- [Install the RealPresence DMA System Software](#)

## Verify Shipment Contents

Polycom Rack Server shipments include the server and other contents. You should verify the type of server and other contents of your shipment when you unpack the system.

The following table describes shipment contents based on the type of server you purchased. Note that some items may arrive in a separate shipment from the server.

Item	R620	R630	R220
1 Polycom Rack Server	X	X	X
1 system DVD	X (May be shipped separately)		
1 blank USB flash drive	X (RealPresence Resource Manager appliances do not include a blank USB flash drive)	X	X
1 USB flash drive labeled <i>Diagnostics</i> that contains server diagnostics utilities. Use these utilities only under the direction of Polycom Global Services.	X	X	X
Power cord(s)	May be shipped separately	May be shipped separately	May be shipped separately
Rail kit	Slide rails with cable management arm	Slide rails with cable management arm	Static rails
Bezel with Polycom badge	X	X	X
RealPresence DMA, Appliance Edition, license and activation key	X (May be shipped separately)	X (May be shipped separately)	X (May be shipped separately)
Polycom warranty letter	X	X	X
<i>Product Information Guide</i>	X	X	X

## Unpack and Install the Hardware

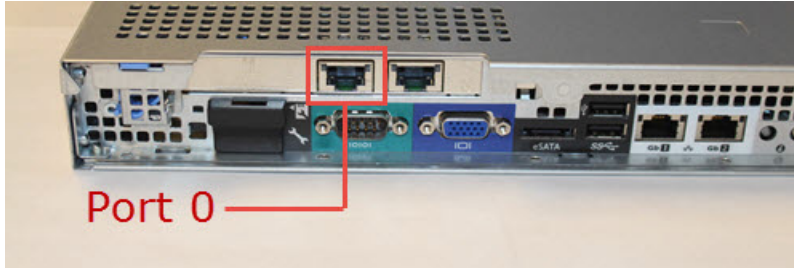
The RealPresence DMA system, Appliance Edition can be installed on the following servers:

- Polycom Rack Server 630 (R630)
- Polycom Rack Server 220 (R220)
- Polycom Rack Server 620 (R620)

You should verify the type of server and other contents of your shipment when you unpack the system.

## TASK

- 1 Examine the shipping container for damage.  
If you find damage, file a claim with the delivery carrier. is not responsible for damage sustained during shipment of this product.
- 2 Open and review the container packing slips.
- 3 Open the container and examine the contents for damage.  
If you find damage, file a claim with the delivery carrier. Keep all shipping materials in case you need them later.
- 4 Unpack your system and identify each item.  
A single-server RealPresence DMA system shipment includes the items listed in [Verify Shipment Contents](#).
- 5 Assemble the rails and install the server in the rack.  
To rack-mount a server, see the following instructions:
  - Polycom Rack Server 630 (R630) server:  
<http://www.dell.com/support/home/us/en/04/product-support/product/poweredge-r630/manuals>
  - Polycom Rack Server 620 (R620) server:  
<http://www.dell.com/support/home/us/en/04/product-support/product/poweredge-r620/manuals>
  - Polycom Rack Server 220 (R220) server:  
<http://www.dell.com/support/home/us/en/04/product-support/product/poweredge-r220/manuals>
- 6 Connect the server's power cable(s) to the server and connect a VGA cable from the server to the monitor.
- 7 Connect all power cables into a grounded electrical outlet or separate power source, such as an uninterruptible power supply (UPS) or power distribution unit (PDU).
- 8 Connect a monitor and keyboard to the server.
- 9 Press the power button on the server and on the monitor.  
The power indicators should light.
- 10 Create one access password for the system BIOS.
- 11 Set the correct system time in the system BIOS.
- 12 Install the bezel (optional).
- 13 **For Polycom Rack Server 630 (R630) or 620 (R620) servers only:** Connect the **GB 1** Ethernet port to the enterprise network.  
The GB 1 Ethernet port is the eth0 network interface, which must be used for this purpose.
- 14 **For Polycom Rack Server 220 (R220) servers only:** Connect the **Port 0** Ethernet port to the enterprise network.  
The Port 0 Ethernet port is the eth0 network interface, which must be used for this purpose. It is the port that is furthest left on the back of the server.



**Figure 1:** Port 0 Location for Polycom Rack Server 220

## Create a DVD for the System Software

If your RealPresence DMA, Appliance Edition does not have the system software pre-installed, you need to download the software ISO image from the Polycom Support site, burn it onto a blank DVD, then use the DVD to install the software onto the RealPresence DMA server.

### TASK

- 1 Download the RealPresence DMA software ISO image from [Polycom Support](#) to your Windows client system.
- 2 Insert a blank, recordable DVD into your DVD-RW drive.
- 3 Using your DVD recording software, burn the ISO image onto the DVD.
- 4 Verify that the ISO image burned successfully to the DVD, then remove it from your client system.

## Install the RealPresence DMA System Software

If the RealPresence DMA system software is not pre-installed on your server(s), you can install the system software using the RealPresence DMA DVD you created.

Before you install the system software, you should complete the First-time Setup Worksheet to note your general system settings. See [Complete the First-Time Setup Worksheet](#).

### TASK

- 1 Turn on the RealPresence DMA system server and insert the DVD.
- 2 Restart the system server.

The server boots from the DVD, and the installation starts. Installation takes approximately 20-30 minutes, after which the DVD ejects and the server restarts twice. For Polycom Rack Server 630 (R630)-based or 620 (R620)-based systems, **DMA Installed** is displayed on the front panel LCD when installation is complete. This indicates that the system software is installed but its network and time settings are not configured.

- 3 Remove the DVD from the server's DVD drive.
- 4 If you are installing a two-server cluster, repeat these steps for the second system server.



# Initial Configuration

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The sections that follow describe the RealPresence DMA system software initial log in and configuration.

## Virtual Edition Initial Configuration

After installation of the Virtual Edition software, you need to configure the Virtual Edition system using the system's web interface.

### TASK

- 1 From a PC with network access to the Virtual Edition system, point your browser to the URL for the system instance (ignore any security certificate warning that may appear) and log in with user ID **admin** and password **Polycom12#\$**.

The End User License Agreement (EULA) is presented, along with a check box to accept or decline the Agreement. In this dialog, you can also agree or disagree to send usage data to Polycom to help improve the product. See the *Polycom RealPresence DMA System Operations Guide* for more information about automatic data collection.

- 2 Ensure that the check box labeled **I accept the terms of this license agreement** is checked, and click **Accept**.

On the RealPresence DMA system's management interface, the Dashboard is displayed. Using its menus, you can complete your system setup.

- 3 Go to **Admin > Local Cluster > Network Settings** and select the **System IP type** that you specified in the [First-Time Setup Worksheet](#).
- 4 If you need to change the network configuration, enter the network values from the [First-Time Setup Worksheet](#).
- 5 Click **Update**.

When asked to confirm restarting the system, click **Yes**.

The system begins to restart.

- 6 Point your browser to the system's virtual host name or IP address, and log in with user ID **admin** and password **Polycom12#\$**.

- 7 Go to **Admin > Local Cluster > Time Settings** and do the following:

- a Select the correct **System time zone** for your location.

We strongly recommend selecting the best location-specific setting, not one of the generic GMT offset settings. If you really want to use a generic GMT offset, note that they use the Linux/Posix convention of specifying how many hours ahead of or behind local time GMT is. Thus, the generic equivalent of America/Denver (UTC-07:00) is GMT+07, not GMT-07.

- 8 Under **NTP servers**, enter the IP addresses or domain names for the time servers from the [First-Time Setup Worksheet](#).

We strongly recommend specifying at least one and preferably three time servers. Use NTP stratum 3 quality time servers if possible. At least one time server must be specified before creating or joining a supercluster.

- 9 Click **Update**.

When asked to confirm restarting the system, click **Yes**.

The system restarts, which takes several minutes.

- 10 Log back in to the system and complete your system setup.

The tasks required to complete the system configuration are described in the online help or the *Polycom RealPresence DMA System Operations Guide*.

## Appliance Edition Initial Configuration

You can configure the RealPresence DMA system, Appliance Edition server(s) using the supplied RealPresence DMA system USB flash drive. If you have not prepared the USB flash drive with the required settings, see [Prepare the USB Flash Drive \(Appliance Edition Only\)](#).

Note that if for some reason you are not able to use the USB Configuration Utility, you can configure your system servers without using it. See [Initial Configuration Without Using the USB Flash Drive](#) for more information.

### TASK

- 1 If you are *not* replacing the system software, go to step 2. If you *are* replacing the system software on the server(s) with a newer version, do the following:

- a Turn on the first (or only) server and insert the system recovery disc for the newer version.
- b Insert the USB flash drive into one of the server's USB ports.
- c Restart the first (or only) server.

Leave the second server off.

The server boots from the DVD, and the installation commences. About 15-20 minutes later, the DVD ejects and the server restarts twice. The server then reads its network and system parameters from the USB flash drive and applies them.

- d Go to step 3.

- 2 If you are not replacing the system software, do the following:

- a On the first (or only) server, insert the USB flash drive into a USB port.
- b Turn on the first (or only) server.

Leave the second server turned off.

After it boots, the server reads its network and system parameters from the USB flash drive and applies them.

- c Go to step 3.

- 3 If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system, wait for the front panel LCD to display **DMA Ready**.

If not, wait 10 minutes for the system to finish applying settings.

- 4 Disconnect the USB flash drive and if applicable, remove the disc.

If you're installing a single-server system, skip to step 7.

**LCD messages**

If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system and **DMA Installed** is displayed on the LCD, the system software is installed, but not configured. Make sure the USB flash drive is set to apply system parameters and inserted into a functioning USB port, and then restart the server.

If anything else or nothing is displayed, stop. Contact Polycom Global Services for assistance.

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- 5 If you are installing a two-server cluster and *not* replacing the system software, go to step 7.

If you are installing a two-server cluster and replacing the system software with a newer version, follow the next few steps.

Remember that both servers in the cluster must be running the same version of the software, so if you installed a newer version on the first server, you must install the same version on the second server.

- a Turn on the second server and insert the system recovery disc for the newer version.
- b If you are using Polycom Rack Server 630 (R630) or 620 (R620) systems, connect an Ethernet cable between the GB 2 ports of the two servers.

If you are using Polycom Rack Server 220 (R220) systems, connect an Ethernet cable between the Port 1 ports of the two servers.

- c Restart the second server.

Leave the first server turned on.

The second server boots from the DVD and the installation commences. About 15-20 minutes later, the DVD ejects and the server restarts twice. After the second restart, the second server detects the first server, gets its configuration settings from it, and joins the cluster. If you are using Polycom Rack Server 620 (R620) systems, after the servers start, **DMA Clustered** is displayed on both servers' LCDs.

**What are the LCDs displaying?**

If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system and **DMA Clustered** is not displayed on the LCD, stop. Contact Polycom Global Services for assistance.

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- d Go to step 7.

- 6 If you are installing a two-server cluster and not replacing the system software, follow the next few steps.
- a If you are using Polycom Rack Server 630 (R630) or 620 (R620) systems, connect an Ethernet cable between the GB 2 ports of the two servers.
- If you are using Polycom Rack Server 220 (R220) systems, connect an Ethernet cable between the Port 1 ports of the two servers.

- b Turn on the second server.
- Leave the first server on.

After it boots, the second server detects the first server, gets its configuration settings from it, and joins the cluster. If you are using Polycom Rack Server 630 (R630) or 620 (R620) systems, when done, both servers' LCDs display **DMA Clustered**.

***What are the LCDs displaying?***

If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system and **DMA Clustered** is not displayed on the LCD, stop. Contact Polycom Global Services for assistance.

- 7 Depending on which server you have, do one of the following:
- For Polycom Rack Server 630 (R630) or 620 (R620) systems, connect an Ethernet cable from the GB 1 Ethernet port of the server(s) to the enterprise network to be used for management or combined traffic.
  - For Polycom Rack Server 220 (R220) systems, connect an Ethernet cable between the Port 0 Ethernet port of the server to the enterprise network.

- 8 On a PC with network access to the RealPresence DMA system, point your browser to the system's virtual host name or IP address and log in with user ID **admin** and password **Polycom12#\$**.

The End User License Agreement (EULA) is presented, along with a check box to accept or decline the Agreement. In this dialog, you can also agree or disagree to send usage data to Polycom to help improve the product. See the *Polycom RealPresence DMA System Operations Guide* for more information about automatic data collection.

- 9 Ensure that the check box labeled **I accept the terms of this license agreement** is checked, and click **Accept**.

On the RealPresence DMA system's management interface, the Dashboard is displayed. Using its menus, you can complete your system setup.

The tasks required to complete the system configuration are described in the online help (*Polycom RealPresence DMA System Operations Guide*), which refers you to the relevant online help or operations guide topics for detailed descriptions and procedures as appropriate.

***Do not unplug a Polycom Rack Server 630 (R630) or 620 (R620) system without proper shut-down***

Do not turn off a Polycom Rack Server 630 (R630) or 620 (R620) system server by unplugging it or otherwise removing power, especially if the system will remain turned off for some time. If a server loses power without being properly shut down, the RAID controller fails to shut down, eventually depleting its battery. If that happens, the server cannot be restarted without user input, requiring a keyboard and monitor.

## Initial Configuration Without Using the USB Flash Drive

If for some reason you cannot use the USB Configuration Utility on the USB flash drive, you can use the following procedure to complete the initial setup using only a laptop PC and an Ethernet cable.

This is possible because RealPresence DMA system servers are shipped with the following default network settings that you can use to connect to the system:

IP address: 192.168.200.10

Subnet mask: 255.255.255.0

Default gateway: 192.168.200.1

### TASK

- 1 Follow the instructions in [Unpack and Install the Hardware](#), but do not connect the server(s) to the enterprise network.
- 2 Configure the network settings on your laptop to put it on the same network segment as the RealPresence DMA system server(s).

You can use the following settings, for example:

- IP address: 192.168.200.20
- Subnet mask: 255.255.255.0
- Default gateway: 192.168.200.1

- 3 If you are using Polycom Rack Server 630 (R630) or 620 (R620) systems, connect an Ethernet cable between your laptop and the GB 1 interface of the first (or only) server.

If you are using Polycom Rack Server 220 (R220) systems, connect an Ethernet cable between your laptop and the Port 0 interface of the first server.

- 4 If you are *not* replacing the system software on the server(s) with a newer version, go to step 5.

If you *are* replacing the system software on the server(s) with a newer version, do the following:

- a Turn on the first (or only) server and insert the system recovery disc for the newer version.
- b Restart the first (or only) server.

Leave the second server turned off.

The server boots from the DVD and the installation commences. About 15-20 minutes later, the DVD ejects and the server restarts. If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system, after the server starts, **DMA Installed** is displayed on the front panel LCD. This indicates that the system software is installed but its network and time settings are not configured.

#### ***What are the LCDs displaying?***

If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system and **DMA Installed** is not displayed on the LCD, stop. Contact Polycom Global Services for assistance.

- 
- c Go to step 6.

- 5 If you're not replacing the system software, start the first (or only) server.

The server restarts, which takes several minutes. If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system, after the server starts, **DMA Installed** is displayed on the front panel LCD. This indicates that the system software is installed but its network and time settings are not configured.

#### ***What are the LCDs displaying?***

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If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system and **DMA Installed** is not displayed on the LCD, stop. Contact Polycom Global Services for assistance.

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- 6** On the laptop, point your browser to <http://192.168.200.10> (ignore any security certificate warning that may appear) and log in with user ID **admin** and password **Polycom12#\$**.

The End User License Agreement (EULA) is presented, along with a check box to accept or decline the Agreement. In this dialog, you can also agree or disagree to send usage data to Polycom to help improve the product. See the *Polycom RealPresence DMA System Operations Guide* for more information about automatic data collection.
- 7** Ensure that the check box labeled **I accept the terms of this license agreement** is checked, and click **Accept**.

On the RealPresence DMA system's management interface, the Dashboard is displayed. Using its menus, you can complete your system setup.
- 8** Go to **Admin > Local Cluster > Network Settings** and select the **System IP type**, **System server configuration**, and **System split network setting** that you specified in [Complete the First-Time Setup Worksheet](#).

The settings you choose for these items determine which of the remaining network value fields are enabled. For instance, if you specify a single-server configuration, the Server 2 fields are disabled. Be sure you have read and understand the cautions regarding supercluster configurations and two-server configurations at the beginning of this document.
- 9** Enter the network values from the [Complete the First-Time Setup Worksheet](#).

***Make certain LAN Security Settings are correct***

If the network into which you're installing the system requires 802.1x authentication for servers (this is rarely the case), incorrect settings in the LAN Security Settings section can make the system unreachable. Recovering from this situation requires that you disconnect the system from the network and connect a laptop directly to the system to access it. Make certain these settings are correct if needed.

---
- 10** If you need to set up a special network routing rule or rules, click **Routing Configuration**, create the rule(s), and click **OK**.

In the usual combined network configuration, routing rules are generally not necessary. In a split network configuration, routing rules are necessary for proper routing of network traffic. If you are not sure what rule or rules you need, consult the appropriate IT staff or network administrator for your organization.
- 11** Click **Update**.

When asked to confirm restarting the system, click **Yes**.

The system begins to restart.

**12** While the server is restarting, do the following:

- a Disconnect the Ethernet cable from the laptop.
- b If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system, connect the server's GB 1 Ethernet port to the enterprise network to be used for management or combined traffic.  
If you are using a Polycom Rack Server 220 (R220) system, connect the server's Port 0 Ethernet port to the enterprise network.

This is the eth0 network interface, which must be used for this purpose.

- c For a split network configuration using a Polycom Rack Server 620 (R620) system, connect the GB 3 Ethernet port to the network to be used for signaling traffic.

For a split network configuration using a Polycom Rack Server 220 (R220) system, connect the GB 1 Ethernet port to the network to be used for signaling traffic.

This is the eth2 network interface, which must be used for this purpose.

The restart process takes several minutes. If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system, after the server starts, **DMA Ready** is displayed on the front panel LCD.

***What is the LCD displaying?***

If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system and anything else or nothing is displayed on the LCD, stop. Contact Polycom Global Services for assistance.

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**13** From a PC with network access to the RealPresence DMA system, point your browser to the system's virtual host name or IP address (if installing a two-server system) or physical host name or IP address (if installing a single-server system).

Then log in with user ID **admin** and password **Polycom12#\$**.

**14** Go to **Admin > Local Cluster > Time Settings** and do the following:

- a Select the correct **System time zone** for your location.

We strongly recommend selecting the best location-specific setting, not one of the generic GMT offset settings. If you really want to use a generic GMT offset, note that they use the Linux/Posix convention of specifying how many hours ahead of or behind local time GMT is. Thus, the generic equivalent of America/Denver (UTC-07:00) is GMT+07, not GMT-07.

**15** Under **NTP servers**, enter the IP addresses or domain names for the time servers from the [First-Time Setup Worksheet](#).

We strongly recommend specifying at least one and preferably three time servers. Use NTP stratum 3 quality time servers if possible. At least one time server must be specified before creating or joining a supercluster.

**16** Click **Update**.

When asked to confirm restarting the system, click **Yes**.

The system restarts, which takes several minutes. If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system, after the server starts, **DMA Ready** is displayed on the front panel LCD.

**17** If you are installing a single-server system, skip to step **18**.

If you are installing a two-server cluster, follow the next few steps.

Remember that both servers in the cluster must be running the same version of the software, so if you installed a newer version on the first server, you must do so on the second server.

- a If you replaced the system software on the first server with a newer version, turn on the second server, insert the system recovery disc for the newer version, and restart it.

The server boots from the DVD, and the installation commences. About 15-20 minutes later, the DVD ejects and the server restarts. If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system, after the server starts, **DMA Installed** is displayed on the front panel LCD. This indicates that the system software is installed, but its network and time settings aren't configured.

***What is the LCD displaying?***

If you are using a Polycom Rack Server 630 (R630) or 620 (R620) system and anything else or nothing is displayed on the LCD, stop. Contact Polycom Global Services for assistance.

- b Depending on which servers you have, do one of the following:
  - ◆ If you are using Polycom Rack Server 630 (R630) or 620 (R620) systems, connect the GB 1 Ethernet port of the second server to the enterprise network to be used for management (or combined) traffic. For a split network configuration, connect the GB 3 port to the network to be used for signaling traffic.
  - ◆ If you are using Polycom Rack Server 220 (R220) systems, connect the Port 0 Ethernet port of the second server to the enterprise network to be used for management (or combined) traffic. For a split network configuration, connect the GB 1 port to the network to be used for signaling traffic.
- c If you are using Polycom Rack Server 630 (R630) or 620 (R620) systems, connect an Ethernet cable between the GB 2 ports of the two servers.  
If you are using Polycom Rack Server 220 (R220) systems, connect an Ethernet cable between the Port 1 ports of the two servers.
- d Verify that the first server is running and (for Polycom Rack Server 620 only) **DMA Ready** is displayed on its front panel LCD.  
If it is a Polycom Rack Server 220 (R220) system, wait 10 minutes for the system to finish booting.
- e Turn on (or restart) the second server.  
After the second server boots, it detects the first server, gets its configuration settings from it, and joins the cluster. If the servers are Polycom Rack Server 630 (R630) or 620 (R620) systems, when done, **DMA Clustered** is displayed on both servers' LCDs.

***What are the LCDs displaying?***

If you are using Polycom Rack Server 630 (R630) or 620 (R620) systems and **DMA Clustered** is not displayed on the LCDs, stop. Contact Polycom Global Services for assistance.

**18** Log back into the system and complete your system setup.

The tasks required to complete the system configuration are described in the “Polycom DMA System Initial Configuration Summary” section of the online help or the *Polycom RealPresence DMA System Operations Guide* for detailed descriptions and procedures as appropriate.

***Do not unplug a Polycom Rack Server 630 (R630) or 620 (R620) system without proper shut-down***



Do not turn off a Polycom Rack Server 630 (R630) or 620 (R620) system server by unplugging it or otherwise removing power, especially if the system will remain turned off for some time. If a server loses power without being properly shut down, the RAID controller fails to shut down, eventually depleting its battery. If that happens, the server cannot be restarted without user input, requiring a keyboard and monitor.

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## System Licenses

Once you've finished first time setup, you will need to license your system. This process depends on the type of license you have for your product. Polycom RealPresence Clariti™ customers and Virtual Edition customers must license their system using the RealPresence Platform Director system. If you are not a RealPresence Clariti customer and have an Appliance Edition, you must upload a license file.

- [License Your System with RealPresence Platform Director](#)
- [License Your System with a License File](#)

### License Your System with RealPresence Platform Director

You will need to ensure the RealPresence Platform Director system can communicate with your Virtual Edition so it can be licensed and monitored.

- If you used the RealPresence Platform Director system to deploy your RealPresence DMA system, this is done automatically.
- If you used your virtual environment tools to install the system, you need to add your system instance to the RealPresence Platform Director if you have not done so already.

For complete instructions on how to use the RealPresence Platform Director system, see the *RealPresence Platform Director System Administrator Guide*.

### License Your System with a License File

If you deployed an Appliance Edition system and are not a RealPresence Clariti customer, you need to license the system using an activation key code or license file.

For complete instructions on how to license your Appliance Edition system, see the *Polycom RealPresence DMA System Operations Guide* or online help.

## Additional Configuration

Additional configuration tasks are discussed in Chapter 2 of the Polycom RealPresence DMA System Operations Guide.