



**Military Unique Deployment Guide**

Version 8.3.0.J May 2014 | DOC2714B

# Polycom® RealPresence® Collaboration Server (RMX) 1500/2000/4000 Deployment Guide for Maximum Security Environments



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This software has achieved UC APL certification.

This document provides the latest information for security-conscious users running Version 8.3.0.J software. The information in this document is not intended to imply that DoD or DISA certifies Polycom RMX systems.

## Support Information

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## Documentation Feedback

Polycom appreciates your help as we work to improve its product documentation. Send your comment to [videoinformationdesign@polycom.com](mailto:videoinformationdesign@polycom.com).

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## Document Change History

This information is required for listing on the US Department of Defence (DoD) Unified Capabilities (UC) Approved Products List (APL):

Doc Version	Release Date	Description
1.0	May 2014	Initial approved release

**CONDITION OF FIELDING.** When the system is deployed into an operational environment, the following security measures (at a minimum) must be implemented to ensure an acceptable level of risk for the sites' Designated Approving Authority:

- a. The system must be incorporated in the site's PKI. If PKI is not incorporated, the following findings will be included in the site's architecture:
  - APP3280 for RMX Rel. 8.3.0.J; DMA 7000 Rel. 6.0.1J
  - APP3290 for DMA 7000 RMX Rel. 8.3.0.J; DMA 7000 Rel. 6.0.1J
  - APP3300 for DMA 7000 RMX Rel. 8.3.0.J; DMA 7000 Rel. 6.0.1J
  - APP3305 for DMA 7000 RMX Rel. 8.3.0.J; DMA 7000 Rel. 6.0.1J
  - DSN13.17 for RMX
  - NET0445 for RMX; DMA 7000
- b. The system must be integrated into the site's AD environment for authentication and authorization requirements.
- c. The site must be a STIG-compliant, PK-enabled workstation for management of the solution.
- d. The configuration must be in compliance with the Polycom RMX Family Rel. 8.3.0.J military-unique features deployment guide.
- e. The site must register the system in the Systems Networks Approval Process Database <<https://snap.dod.mil/index.cfm>> as directed by the DSAWG and Program Management Office.



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# First Time Installation and Configuration



This software, when configured per the guidance provided in this guide, is designed to meet the latest U.S. Department of Defense (DoD) security requirements for listing on the Unified Capabilities (UC) Approved Products List (APL) as maintained by the Defense Information Systems Agency (DISA) Unified Capabilities Connection Office (UCCO). For more information about the UC APL process, please visit the UCCO website.

This document provides guidance for configuring and using software version 8.3.0.J to be consistent with the conditions for deployment as listed in the UC APL listing for the Polycom Realpresence Collaboration Server (RMX) product. For a listing of certified software versions in addition to version 8.3.0.J, refer to

<http://www.polycom.com/solutions/solutions-by-industry/us-federal-government/certification-accreditation.html>



Do **not** insert a *USB* device into the *RMX's* *USB* port unless it is your intention to disable *Secured Mode* or perform a *Comprehensive Restore to Factory Defaults*.

## Workstation Requirements

The *RMX Manager* application can be installed in an environment that meets the following requirements:

- **Minimum Hardware** – Intel® Pentium® III, 1 GHz or higher, 1024 MB RAM, 500 MB free disk space.
- **Workstation Operating System** – Microsoft® Windows® XP, Vista®, Windows® 7.
- **Network Card** – 10/100 Mbps.
- **Web Browser** – Microsoft® Internet Explorer® Version 6 or higher.
- **FIPS** – Is always enabled in *Ultra Secure Mode*, and when *ClickOnce* is used to install *RMX Manager*, the workstation must have one of the following installed:
  - *.NET Framework 3.5* or a later version of the *.NET Framework*.
  - *.NET Framework 2.0* plus *Service Pack 1* or later.



*.Net Framework 2.0* is required and installed automatically.

The *RMX* must be added to *Internet Explorers Local Intranet Zone* or added to the trusted sites list. In both cases, the *ActiveX* control will install properly.



Management of the *RMX* using the *RMX Web Client* (not recommended) requires the installation of *ActiveX*. In deployments where *ActiveX* is prohibited, administrators must use the *RMX Manger*.



For users deploying a *RMX Serial Gateway S4GW*, the **VIEW\_RVGW\_ACTIVEX** System Flag can be added and its value modified to determine if *ActiveX* controls are used to display the *RMX Serial Gateway S4GW* web site. If the flag value is set to **NO** (default) an external *Internet Explorer* browser is launched to display the *RMX Serial Gateway S4GW* web site. For more information see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide "ActiveX Bypass"*.

## Required IT Infrastructure

The following IT infrastructure components are required to secure the *RMX* conferencing (audio and video) solution.

- External *Domain Name Server (DNS)*
- *Network Time Protocol (NTP)* server
- *Certificate Authority* server.
- *Certificate Revocation List (CRL)* distribution point for each *Certificate Authority (CA)* used in the configuration
- *Online Certificate Status Protocol (OCSP)*

## DNS

All systems that are part of the secure solution, whether IT infrastructure or *Polycom* devices, must be configured with the capability to resolve all other *Polycom* and other IT infrastructure device *Host Names* on the network. This includes all workstations used to access the *RMX Management Network* using the *RMX Manager*.

The easiest way to do this is to use a *DNS* server to ensure that each device in the deployment can be identified by a *Fully Qualified Domain Name (FQDN)*.

- Devices must have *FQDNs* in order to use security certificates.
- In dual stack network configurations that support both *IPv4* and *IPv6*, both *IP* addresses must be included in the *DNS* configuration.
- When connecting to devices within the IT infrastructure from *Polycom* devices, the *FQDN* of the respective machines should be used.

## NTP Servers

In order to meet *Maximum Security* requirements, a secure audio and video conferencing environment must include at least two *NTP* servers. Security certificates are not required for *NTP* servers.



The *RealPresence Server* will not use a time source such as a *Windows-based, W32Time* service (*SNTP*) time service. Only full-featured (*Stratum 16* or below) *NTP* Servers are considered sufficiently reliable for high-accuracy timing environments.

## Certificate Authority Server

A certificate authority (*CA*) server is used to issue and manage security credentials. A *CA* server is an integral part of a (*Public Key Infrastructure*) *PKI* security system and is a required component of a *Maximum Security Environment*.

- *Polycom* products must be able to resolve the CA server using its *Fully Qualified Domain Name (FQDN)*.
- With the exception of the *NTP* servers, all networked components within the *Maximum Security Environment* must have a valid certificate or certificate chain. A *Certificate Revocation* policy and a *Certificate Revocation* method for all networked components must also be established.
- Certificates issued for *Polycom* devices within a *Maximum Security Environment* must meet the specific requirements as described in *Polycom® RMX® 1500/2000/4000 Administrator's Guide "Certificate Configuration and Management"*.
- For certificate management, networked components within the *Maximum Security Environment* can use either an *Online Certificate Status Protocol (OCSP)* responder or *Certificate Revocation Lists (CRLs)*. For more information see *Polycom® RMX® 1500/2000/4000 Administrator's Guide "Certificate Configuration and Management"*.

## RMX Hardware

Version 8.3.0.J requires that *MPMx* cards are installed in the RMX.

## First Time Installation and Configuration

First Time Installation and Configuration of the *Collaboration Server 1500/2000/4000* consists of the following procedures:

### 1 Hardware Installation and Setup

- Mount the RMX in a rack.
- Connect the necessary cables.

### 2 Gather Network Equipment and Address Information

- Get the information needed for integrating the RMX into the local (Signaling and Management) networks.

### 3 First Entry Configuration

- Register the RMX.
- Obtain *Product Activation Key* for the RMX.
- Download and install the *RMX Manager* onto a workstation.
- Connect workstation to the *Default Management Network*.
- Power up the RMX.
- Activate the RMX product.
- Modify the *Default Management Network*.
- Configure the IP (*Signaling*) *Network Service*.
- Configure the *ISDN/PSTN Network Service*.

### 4 Enable Ultra Secure Mode

### 5 Enable Network Separation (RMX 2000)

### 6 Enable Secured Communication

- Purchase and Install the SSL/TLS certificate
- Modify the *Management Network* settings
- Create/Modify the relevant *System Flags*

- 7 Configure SIP/AS-SIP for the Signaling Network
- 8 Set System Configuration Flags
- 9 Configure 802.1X Authentication (Optional)
- 10 Configure Precedence (DSCP) and QOS
- 11 Configure IVR Settings
- 12 Modify Default Login Banner Text (Optional)
- 13 Rename the default POLYCOM user
- 14 Disable Inline AutoComplete Option in Web Browser
- 15 Configure White List Access
- 16 Configure Gateway Services

## Upgrading to Version 8.3.0.J

If you are upgrading to version 8.3.0.J from a previous version, see the *Polycom® RealPresence® Collaboration Server (RMX) 1500/2000/4000 Release Notes for Maximum Security Environments, "Upgrade Procedures"*.

## Procedure 1: Hardware Installation and Setup

In a well ventilated area, mount the RMX 1500/RMX 2000/RMX4000 unit in a 19" rack. It is important to adhere to the *Site Requirements* as described in the *RMX 1500/2000/4000 Hardware Guides, "Site Requirements"*.



To maximize conferencing performance, especially in high bit rate call environments, a 1Gb connection is recommended for all RMX types.

The following procedures have to be performed to install the *RMX System* in your site:








- Installing the *RMX* in a rack or as a standalone. When installing the *RMX* unit on a rack, this process is done in two stages:
  - Installing the telescopic rail runners on the rack. This stage is identical to all *RMX* system types.
  - Mounting the *RMX* on the rack using the previously installed rail runners
- Connecting the *RMX* to the power source
- Connecting the network (*LAN* and *ISDN*) cables to the *RMX*.

## Installing the Telescopic Rail Runners on the Rack

### Telescopic Rail Runners Accessory Kit

Before installing the telescopic rail runners in the rack, make sure that the kit has the following parts:

**Table 1-1** Rail Runners Kit Contents

Part/Kit no.	Item	Item no.	Item Sample	Item Quantity
<b>ASY2716A-L0</b>				
<i>Rail runner</i>	Left rail runner (two types available: item (a) with or (b) without rail runner clip  <b>Note:</b> The rail runner clip is designed to attach and clip onto the chassis runner frame.	1	(a)  (b)   <b>Note:</b> rail runner end views	1
	Right rail runner (two types available: with or without rail runner clip)  <b>Note:</b> The rail runner clip is designed to attach and clip onto the chassis runner frame.	2	See Figure 1-1	1
<i>Rack spacer assembly kit</i>	Rack spacer	3	Front & Rear 	4
	Flat head screw - M5*10mm	4		8
<i>Rail runner assembly kit</i>	Flat head screw - M3*8mm	5		4
	Flat washer M3	6		4
	Nut spring M3	7		4

**Table 1-1** Rail Runners Kit Contents

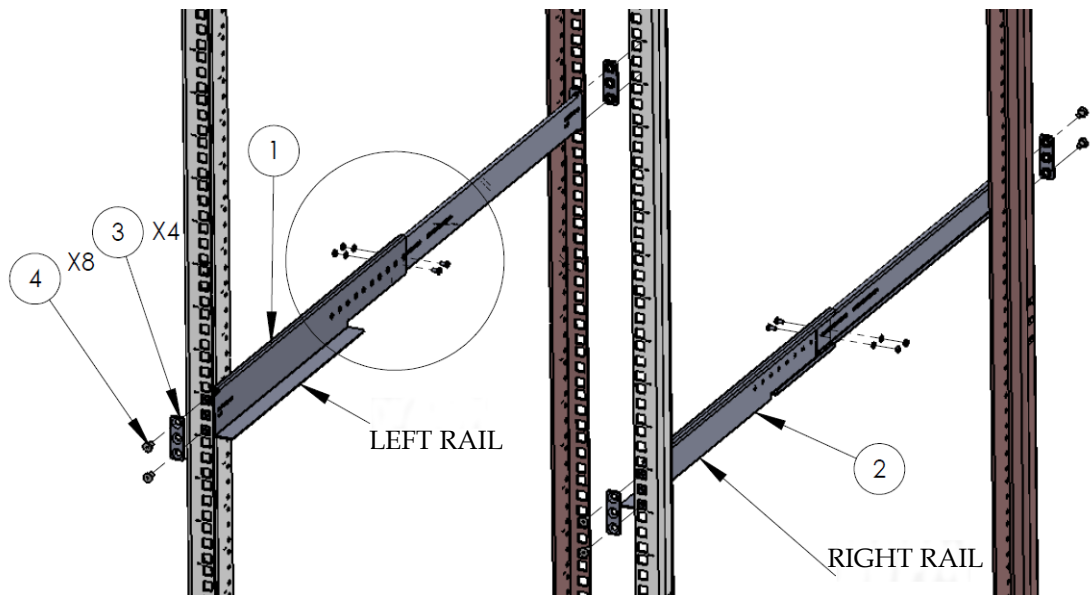
Part/Kit no.	Item	Item no.	Item Sample	Item Quantity
RMX chassis assembly kit	Pan head screw - M5*12mm	8		2
	Flat washer M5	9		2

### Telescopic Rail Runner Assembly



Rack Rail Runners require a minimum of 48cm and a maximum of 80cm within the rack for installation

- 1 Determine the location of the RMX on the rack:
  - Allow for a 1U gap above and below the system for ventilation.
  - Use the *Rack Spacer* (item no. 3) to predetermine its position on the rack post, making sure that square studs of the spacer fit into the rack post's square/rounded mounting holes. Mark the spacer's location on the rack post. Repeat this process for the 3 remaining vertical posts ensuring that the system can be horizontally seated.



**Figure 1-1** Front view of RMX Rail Runner Assembly

- 2 Position the *Rack Spacer* (item no. 3) onto the marked rack post together with left rack rail runner (item no. 1 which is labeled LEFT) and fasten the flat head screws 3\*10mm



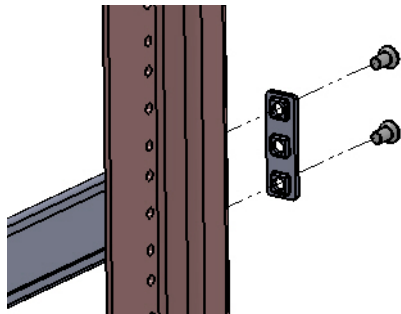
(item no. 4) as shown in the following figure:

**Figure 1-2** Detail of Front Rack Spacer Assembly (left rail runner is shown here) for all RMX types






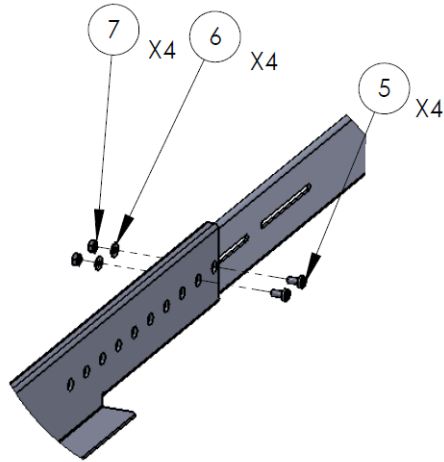
- On the RMX1500/4000 the center hole on the *Rack Spacer* must be left clear as it is required for fixing the RMX to the rack post. See Figure 1-2.
- On the RealPresence Collaboration Server (RMX) 2000 the top hole on the *Rack Spacer* must be left clear as it is required for fixing the RMX to the rack post. See Figure 1-2.

- 3 Adjust the telescopic rack rail runner to the rack opening and mount it onto the marked position of the rear post as described in step 2.



**Figure 1-3** Detail of Rear RealPresence Collaboration Server (RMX) 1500/2000/4000 Rack Spacer Assembly

- 4 Repeat steps 2 and 3 for the right rack rail runner.
- 5 Install the flat head screw  (item 5), flat washer  (item 6) and nut spring  (item 7) in the middle of the telescopic rack rail runner for added stability as shown in Figure 1-4.



**Figure 1-4** Detail of Left Rail Runner (front internal view)



The number of screws to install depends on the rack width.

- 6 Repeat step 5 for the right rack rail runner.

## Installing the RMX 1500



For detailed instructions, precautions and requirements for installing the *RMX 1500* refer to the *Polycom RMX 1500 Hardware Guide*.

The following procedures have to be performed to install the *RMX 1500* in your site:

- **Optional.** Installing the RTM ISDN card on the RMX (Optional)
- Installing the RMX in a rack or as a standalone
- Connecting the RMX to the power source
- Connecting the network (*LAN*, *IP* and *ISDN*) cables to the RMX.

### **Optional. Installing the RTM ISDN 1500 Card on the RMX 1500**

If the ISDN option was purchased with your RMX, the ISDN card is shipped separately and must be manually installed into the rear of the RMX 1500. It is recommended to install the ISDN card before the RMX 1500 is placed in a rack.

### **Removing the blank cover from the rear of the RMX 1500**

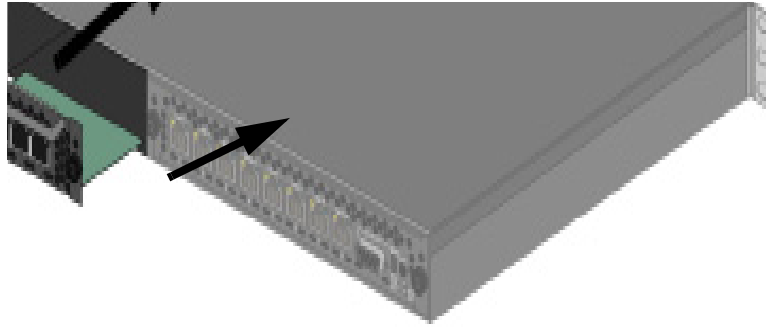
- 1 Ensure that the power switch on the Collaboration Server is turned OFF (O).



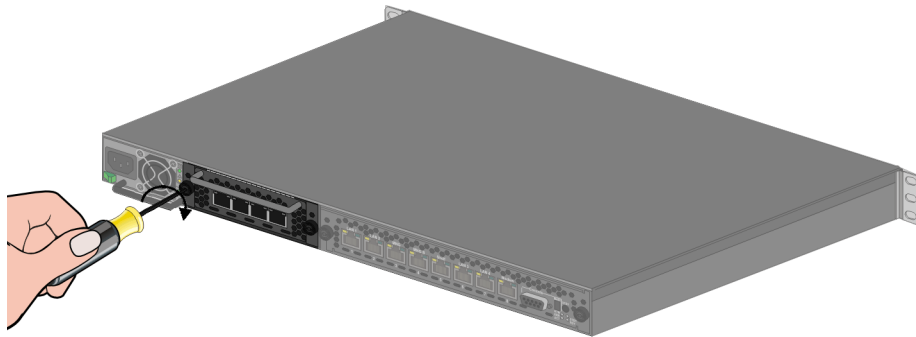
- 2 Remove the cover by unscrewing the captive screws that fasten the card to the MCU.
- 3 Slide out the cover.

### Installing the RTM ISDN 1500 Card

- 1 Slide in the RTM ISDN 1500 card.



- 2 Insert the card into the slot and tighten the captive screws on each side of the rear panel of the card, securing the RTM ISDN card to Collaboration Server.



A Software License is included with the ISDN card. This license must be registered as part of the *Product Registration* and *Product Activation* process.


### Mounting the Collaboration Server 1500 in a Rack

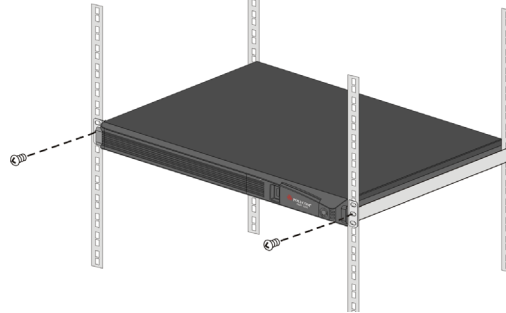
There are two methods for installing the *Collaboration Server* in a 19" rack:

- **Using the rack rail runners on the RMX 1500**
  - Install the telescopic rail runners, as described in "*Installing the Telescopic Rail Runners on the Rack*" on page **1-5**.
  - Mount the *Collaboration Server 1500* on top of the rail runners.

- Fasten the *Collaboration Server* to the rack spacers using the flat head screw



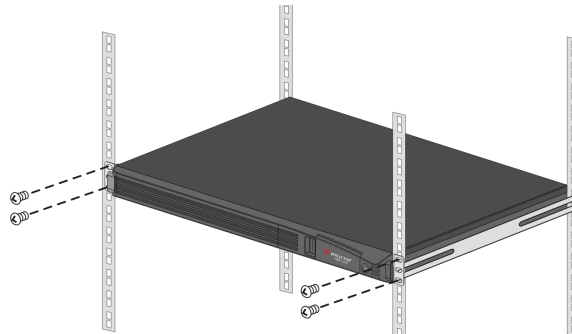
(item 8) with flat washer  (item 9) through the two holes in the *Collaboration Server's* front mounting brackets.



Refer to [Figure 1-2](#), "Detail of Front Rack Spacer Assembly (left rail runner is shown here) for all RMX types" on page [1-7](#) for installation instructions.

- **Using a shelf**

- Install the shelf, supplied by the rack manufacturer, in the rack.
- Mount the *Collaboration Server* unit on the shelf.
- Fasten the *Collaboration Server* unit to the rack with screws through the four holes in the *Collaboration Server's* front mounting brackets.





## Installing the RMX 2000



For detailed instructions, precautions and requirements for installing the RMX 2000 refer to the *Polycom RMX 2000 Hardware Guide*.

The following procedures have to be performed to install the RMX 2000 in your site:

- **Optional.** Installing the RTM ISDN card on the RMX (Optional)
- Installing the RMX in a rack or as a standalone
- Connecting the RMX to the power source
- Connecting the network (LAN and ISDN) cables to the RMX

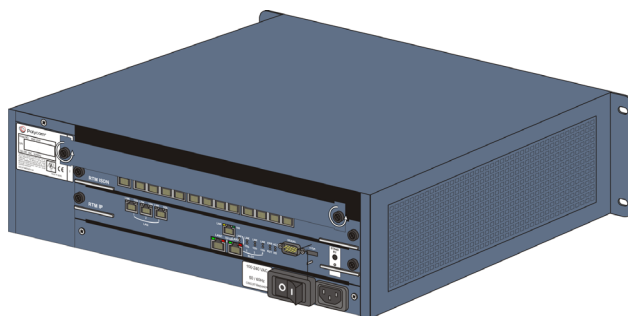
### Optional. Installing the RTM ISDN Card on the RMX 2000

If the ISDN option was purchased with your RMX, the ISDN card is shipped separately and must be manually installed into the rear of the RMX 2000. It is recommended to install the ISDN card before the RMX 2000 is placed in a rack.

### Removing the blank cover from the rear of the RMX 2000

Use the following procedure to remove the blank cover:

- 1 Ensure that the power switch/circuit switch on the Collaboration Server is turned OFF (O).
- 2 Unscrew the captive screws on the rear panel of the Collaboration Server that secure the blank panel.
- 3 Use the metal ejector levers to pull the blank panel.



### Installing the RTM ISDN 2000 Card

A Software License is included with the ISDN card. This license must be registered as part of the *Product Registration* and *Product Activation* process.


### Mounting the Collaboration Server 2000 in a Rack

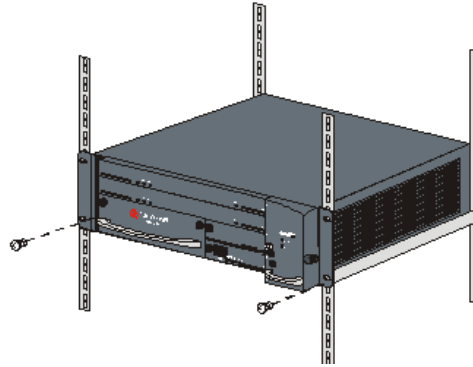
There are two methods for installing the Collaboration Server in a 19" rack:

- **Using rack rail runners on the RMX 2000:**
  - Install the telescopic rail runners, as described in "*Installing the Telescopic Rail Runners on the Rack*" on page 1-5.
  - Mount the *Collaboration Server 2000* on top of the rail runners.

- Fasten the *Collaboration Server* to the rack spacers using the flat head screw

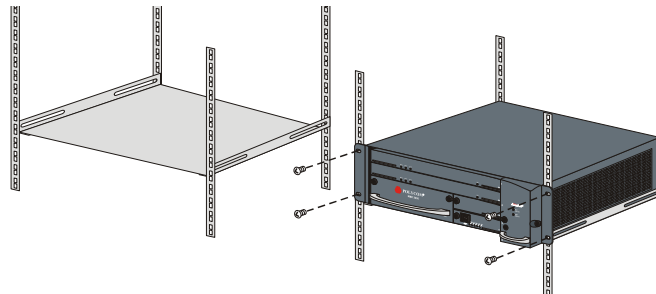


(item 8) with flat washer  (item 9) through the two holes in the *Collaboration Server's* front mounting brackets.



Refer to [Figure 1-2](#), "Detail of Front Rack Spacer Assembly (left rail runner is shown here) for all RMX types" on page [1-7](#) for installation instructions.

- **Using a shelf:**
  - Install the shelf, supplied by the rack manufacturer, in the rack.
  - Mount the Collaboration Server on the shelf.
  - Fasten the Collaboration Server to the rack with screws through the four holes in the Collaboration Server's front mounting brackets.



## Connecting Cables to the RMX 2000



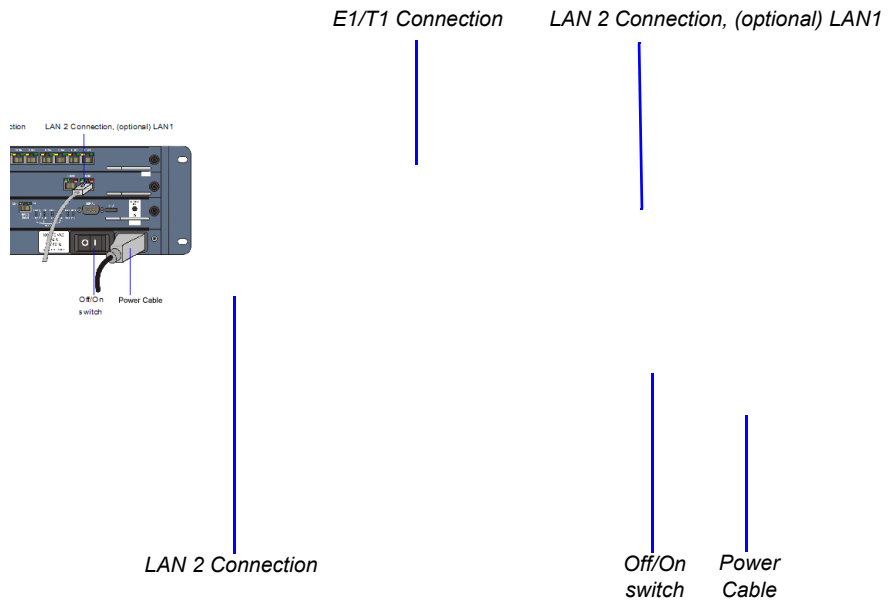
Do not remove the protective caps from LAN1, LAN3 and ShMG ports.

- Connect the following cables to the back panel:



Ensure that the network infrastructure containing all the devices (including the RMX) has two different networks: one for *Management*; the other for *Signaling & Media*. Separation can be achieved either by two physical networks or by two virtual networks (VLANs). These separated networks will be used after *Network Separation* is performed. See "[Procedure 5: Enable Network Separation \(RMX 2000\)](#)" on page [1-56](#).

- Power cable
- On the RTM IP card connect the LAN cable to **LAN 2** Port.
- On the RTM LAN card connect the LAN cable to **LAN 2**.
  - **Optional.** Connect the LAN cable to **LAN 1**.  
With *Multiple Networks* and *LAN Redundancy* configurations, **LAN 1** port is used.  
For more information, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*. "LAN Redundancy" and "Multiple Networks".
- **Optional.** On the RTM ISDN card connect the E1/T1 Cables to **PRI** Ports.



## Installing the RMX 4000

The following procedures have to be performed to install the RMX 4000 at your site:

- **Optional.** Installing the RTM ISDN card on the RMX
- Mounting the RMX in a rack
- Connecting the RMX to the power source
- Connecting the network (LAN and ISDN) cables to the RMX

### Optional. Installing the RTM ISDN Card on the RMX 4000

If the ISDN option was purchased with your RMX, the ISDN card is shipped separately and must be manually installed into the rear of the RMX 2000. It is recommended to install the ISDN card before the RMX 2000 is placed in a rack.

#### Removing the RTM LAN Card or the blank cover from the rear of the RMX 4000

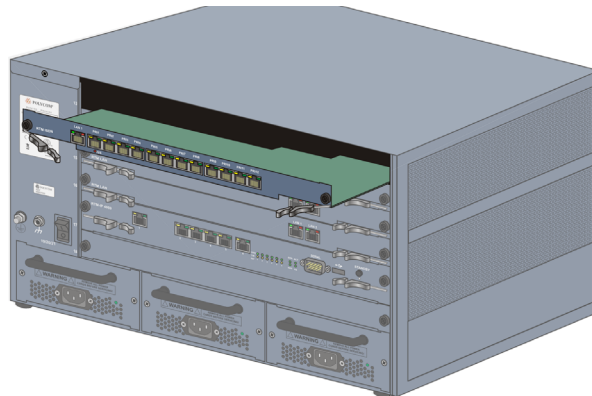
- 1 Ensure that the power switch on the RMX is turned OFF.
- 2 Remove the RTM LAN or blank cover by unscrewing the captive screws that fasten the card or the cover to the RMX. When removing a card, use the metal ejector levers to pull the RTM LAN card out of its slot from the backplane.
- 3 Slide out the RTM LAN or RTM ISDN card.

#### Installing the RTM ISDN 4000 Card

- 1 On the RTM ISDN card move the ejector levers to their fully open position.
- 2 Slide the new RTM ISDN card into its slot.



An RTM ISDN card must connect directly to an MPMx card in the opposite facing front slot.



- 3 Push the card into the slot until the ejector levers touch the front edge of the card cage. Push the ejector levers to their fully closed position.
- 4 Tighten the captive screws on each side of the rear panel of the card, securing the RTM ISDN card to the MCU.

A Software License is included with the ISDN card. This license must be registered as part of the *Product Registration* and *Product Activation* process.

## Mounting the Collaboration Server 4000 in a Rack

Either place the RMX 4000 on a hard, flat surface such as a desktop or mount it on a 19" rack.




For a detailed description of the safety requirements and precautions and the installation of the RMX 4000 as a standalone, or reverse mounting the RMX 4000 on a 19" rack, see the *RealPresence Collaboration Server (RMX) 4000 Hardware Guide*.

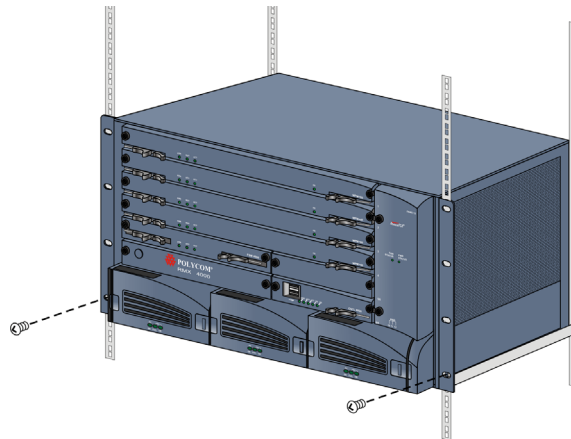
### To install the Collaboration Server 4000 in a 19" rack:

- **Using rack rail runners on the RMX 4000**
  - Install the telescopic rail runners, as described in "Installing the Telescopic Rail Runners on the Rack" on page 1-5.
  - Mount the *Collaboration Server 2000* on top of the rail runners.

- Fasten the *Collaboration Server* to the rack spacers using the flat head screw



(item 8) with flat washer  (item 9) through the two holes in the *Collaboration Server's* front mounting brackets.

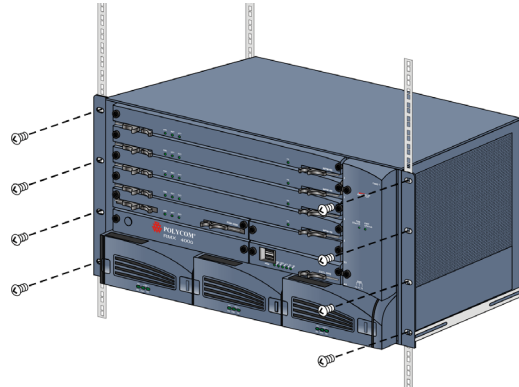


Refer to [Figure 1-2](#), "Detail of Front Rack Spacer Assembly (left rail runner is shown here) for all RMX types" on page 1-7 for installation instructions.

- **Using a shelf**
  - Install the shelf, supplied by the rack manufacturer, in the rack.
  - Mount the *Collaboration Server* on the shelf.



- Fasten the Collaboration Server to the rack with screws through the eight holes in the Collaboration Server's front mounting brackets.



## Connecting the RMX 4000 to the Power Sources

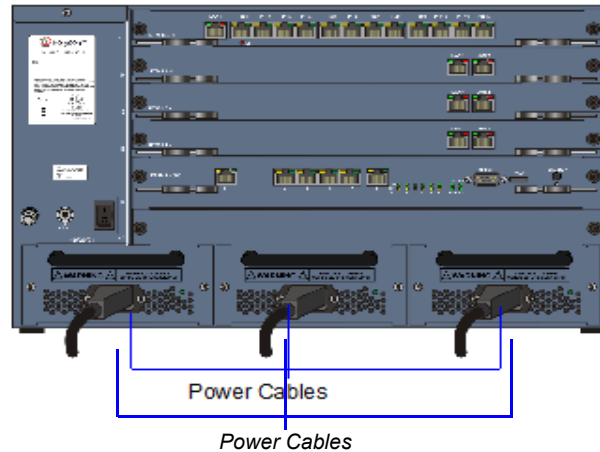


The size of the protective earthing conductor & cable should be a minimum of 10AWG.

Connect the following power cables to the RMX 4000 back panel:

### AC Power Supply connections:

- 1 Insert power cables to each of the three AC Power Entry Modules (PEMs).



### DC Power Supply connections:

- 1 On the DC Power Rail Modules set the two circuit breakers to OFF.



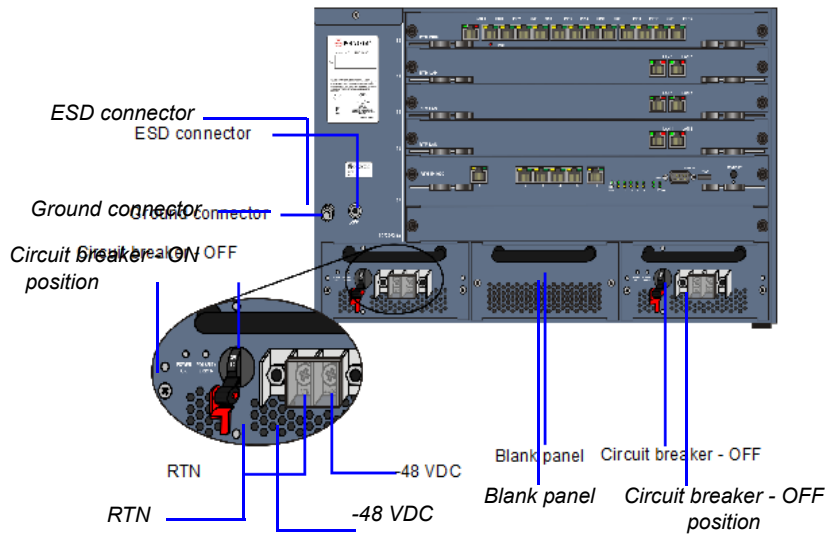
Two types of circuit breakers can be installed on the DC Power Rail Module (PRM). For more information, see the *RealPresence Collaboration Server (RMX) 4000 Hardware Guide*.

- 2 Ensure that the cables from the Main that supplies electricity to the DC power units are OFF or disconnected.
- 3 Remove the transparent plastic caps on the terminal block.

- 4 Using the two wires of a 10 AWG cable running from the DC power distribution unit, connect the black wire into the -48VDC terminal block and the red wire to the RTN terminal block.



- A 10 AWG cable must be used to connect the mains with the RMX 4000 DC Power Rail Model.
- The supply wires for DC version must be terminated using quick connectors.
- Extension cords may not be used.



The center PRM slot/module is fitted with a blank panel and the slot cannot be used on a system with DC Voltage.

- 5 Connect the green or green-yellow wire to the system single-point M6x15 “Ground” bolt.



The rating of the protective earthing conductor should be a minimum of 10AWG.

If the unit is rack mounted, the single-point ground on the MCU must be connected to the rack with a single conductor and fixed as to prevent loosening. When using bare conductors, they must be coated with an appropriate antioxidant compound before crimp connections are made. Tinned, solder-plated or silver plated connectors do not have to be prepared in this manner.

- 6 Replace the transparent plastic caps on the terminal block.
- 7 Turn ON the Main that supplies power to the RMX.
- 8 Turn ON the circuit breaker on each of the DC Power Rail Modules.

## Connecting Cables to the RMX 4000

- To connect the cables (AC and DC systems):



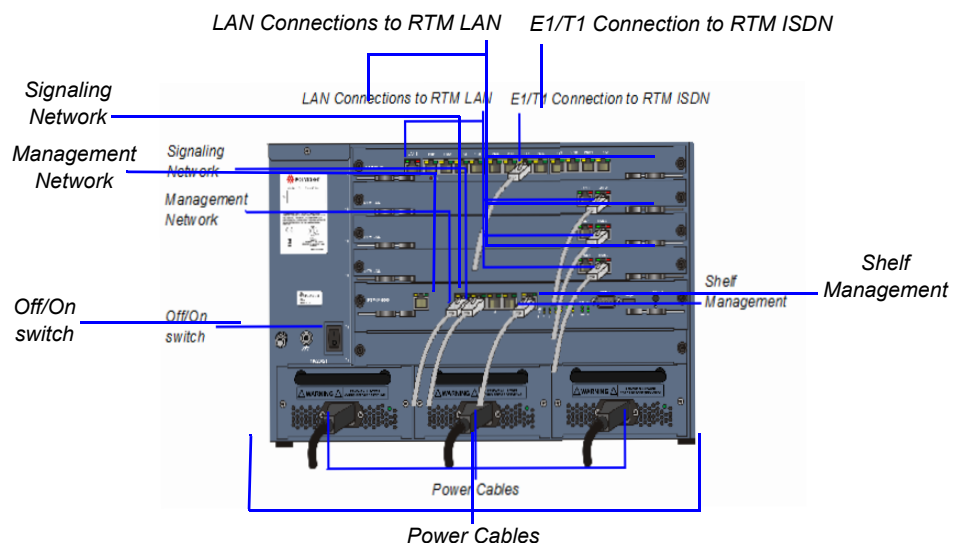
Before plugging network cables in, ensure sure that the network infrastructure containing all the devices (including the RMX) has two different networks: one for *Management*; the other for *Signaling & Media*. Separation can be achieved either by two physical networks or by two virtual networks (VLANs).

- **RTM-IP 4000:**
  - Connect the Management Network cable to **LAN 2**.
  - Connect the Signaling cable to **LAN 3**.
  - Connect the Shelf Management cable to **LAN 6**.



When an NTP Server is used for the *RMX Time*, the Shelf Management cable must be connected to the shelf port.

- For each installed **RTM LAN** - Connect the LAN cable to **LAN 2**.
  - **Optional.** Connect the LAN cable to **LAN 1**. With Multiple networks and LAN redundancy configurations, LAN 1 port is used.  
For more information see the *Administrator's Guide for Maximum Security Environments*, "LAN Redundancy" and "Multiple Networks".
  - **Optional.** When deploying a *Serial Gateway S4GW*, connect a LAN cable from the *S4GW* to either **LAN 1** or **LAN 2**.  
For more information see "Deploying a Polycom RMX™ Serial Gateway S4GW" on page 4-1.
- **Optional.** If RTM ISDN is installed, for each installed **RTM ISDN**:
  - Connect the E1/T1 cables to their **PRI** Ports.
  - Connect the LAN cable to **LAN 1**.



**Figure 1-5** RMX 4000 Rear Panel View with AC Power and Communication Cables

## Procedure 2: Gather Network Equipment and Address Information

### IP Services

The IP addresses and network parameters which enable communication between the Collaboration Server, its management application and the conferencing devices are contained in two IP services:

- **Management Network (Control Unit)**
- **IP (Signaling) Network (Conferencing Service)**

During the *First Entry Configuration*, the parameters of these two network services are modified to comply with your local network settings.

#### Management Network

The *Management Network* enables communication between the Collaboration Server *Control Unit* and the *RMX Manager* and is used to manage the Collaboration Server.

The RMX is shipped with default IP addresses as listed in Table 2-1.

#### Signaling Network

The *Signaling Network* is used to configure and manage communications between the Collaboration Server and conferencing devices.

#### ISDN/PSTN Services

The ISDN/PSTN Network Service is used to define the properties of the ISDN/PSTN switch and the ISDN lines running from the ISDN/PSTN switch to the ISDN card installed in the Collaboration Server.



- The RMX does not support ISDN connections using restricted line rates (56k B channels).
- If the RMX is connected to the public ISDN Network, an external CSU or similar equipment is needed.

### First Time Setup Worksheet

When installing an RMX system, these default system parameters, must be modified to your local network settings and site requirements. It is therefore important to obtain the information needed to complete the **Time Setup Worksheet** from your network administrator before powering up the RMX for the first time.

**Table 1-2** *First Time Setup Worksheet*

Parameter	Factory Default	Local Network Settings	Description
<i>Activation Key</i>	–		Before the Collaboration Server can be used, it is necessary to register the product and obtain an Activation Key, available from <a href="http://portal.polycom.com">http://portal.polycom.com</a>

**Table 1-2** First Time Setup Worksheet (Continued)

Parameter	Factory Default	Local Network Settings	Description
<i>Network Service Name</i>	IP Network Service / Default PSTNService		Network Service Name(s) are required for H.323 and ISDN/PSTNNetwork Services. The default name can be changed and can contain character sets that use Unicode encoding.
<i>Control Unit IP Address</i>	192.168.1.254		Default IP addresses with which the system is shipped to enable direct connection.
<i>Control Unit Subnet Mask</i>	255.255.255.0		
<i>Default Router IP Address</i>	192.168.1.1		
<i>Shelf Management IP Address</i>	192.168.1.252		
<i>Shelf Management Subnet Mask</i>	255.255.255.0		
<i>Shelf Management Default Gateway</i>	192.168.1.1		
<i>Signaling Host IP address</i>	0.0.0.0		The address to be used by IP endpoints when dialing into the RMX.
<i>Media Board IP address (MPM 1)</i>	0.0.0.0		The network administrator should allocate: <ul style="list-style-type: none"> <li>• 4 IP addresses in the local network for an MCU with one MPMx card,</li> <li>• Up to 7even IP addresses for an MCU with up to 4 MPMx cards.</li> </ul>
<i>Media Board IP address (MPM 2)</i> <b>RMX 2000/4000 only</b>	0.0.0.0		
<i>Media Board IP address (MPM 3)</i> <b>RMX 4000 only</b>	0.0.0.0		
<i>Media Board IP address (MPM 4)</i> <b>RMX 4000 only</b>	0.0.0.0		
<i>Default Router IP Address</i>	0.0.0.0		The default router is used whenever the defined static routers are not able to route packets to their destination.
<i>Service Host Name</i>	PolycomMCU.		DNS: The Service Host Name is the FQDN (Fully Qualified Domain Name) of the RMX in the network. The IP address fields are enabled only if Specify is selected. Local Domain Name is the FQDN where the MCU is installed.
<i>DNS</i>	Specify		
<i>Register Host Names Automatically to DNS Server</i>	Off		
<i>Local Domain Name</i>	–		
<i>DNS Server Address</i>	0.0.0.0		
<i>Network Type</i>	H.323		H.323, SIP, H.323 & SIP may be selected. If AS-SIP is to be used, H.323 & SIP must be selected.

**Table 1-2** First Time Setup Worksheet (Continued)

Parameter	Factory Default	Local Network Settings	Description
<i>Gatekeeper</i>	Off		<p>Gatekeeper:</p> <p>When Off is selected, all gatekeeper options are disabled.</p> <p>The gatekeeper's host name as registered in the DNS or IP address can be entered.</p> <p>The Prefix is the number with which this Network Service registers with the gatekeeper, used by H.323 endpoints as the first part of their dial-in string. Up to five aliases can be defined for each RMX.</p>
<i>IP Address or Name</i>	–		
<i>MCU Prefix in Gatekeeper</i>	–		
<i>Alias</i>	–		
<i>Alias Type</i>	None		
<i>H.323 Authentication</i>	Off		H.323 Authentication and User Name are specified in the Security dialog box.
<i>User Name</i>	–		
<i>SIP Server</i>	Off		<p>SIP Server:</p> <p>The IP address of the preferred SIP server or its host name (if a DNS server is used).</p> <p>The domain name is that is the SIP domain. (The SIP domain may be different to the DNS domain.)</p> <p>Select the transport type and protocol that is used for signaling between the MCU and the SIP Server or the endpoints according to the protocol supported by the SIP Server:</p> <p>TLS should be selected for Maximum Security Environment deployments.</p> <p>SIP Authentication and User Name are specified in the Security dialog box.</p>
<i>SIP Server IP address (optional)</i>	–		
<i>SIP Server IP Address or Name</i>	0.0.0.0		
<i>Server Domain Name</i>	DomainName		
<i>Transport Type</i>	TCP		
<i>SIP Authentication</i>	Off		
<i>User Name</i>	–		

**Table 1-2** First Time Setup Worksheet (Continued)

Parameter	Factory Default	Local Network Settings	Description
<i>Do you want to create an ISDN/PSTN service</i>	Yes		ISDN/PSTN: During the initial Collaboration Server setup, if the system detects the presence of the RTM ISDN card, the ISDN / PSTN Network Service definition screens of the Fast Configuration Wizard are enabled. A new ISDN/PSTN Network Service can be defined even if no RTM ISDN card is installed in the system but only using the ISDN/PSTN Network Service ->Add New Service dialog box.
<i>Span Type</i>	E1		
<i>Service Type</i>	PRI		
<i>Default Num Type</i>	Unknown		
<i>Num Plan</i>	ISDN/PSTN		
<i>Net Specific</i>	None		
<i>Dial-out Prefix</i>	–		
<i>Framing</i>	ESF		
<i>Side</i>	User side		
<i>Line Coding</i>	B8ZS		
<i>Switch Type</i>	EURO-ISDN		
<i>First Number</i>	–		
<i>Last Number</i>	–		
<i>MCU CLI</i>	–		
<i>Use NTP Server</i>	–	1:	The IP addresses of up to 3 NTP Servers can be specified.
	–	2:	
	–	3:	
<i>Conference ID Length (MCU)</i>	5		The initial System Flag values can be configured.
<i>Minimum Conference ID Length (User)</i>	4		
<i>Maximum Conference ID Length (User)</i>	8		
<i>MCU Display Name</i>	Polycom RMX 1500/2000/4000		
<i>Terminate Conference when Chairperson Exits</i>	No		
<i>Auto Extend Conferences</i>	Yes		
<i>Administrator User</i>	POLYCOM		In Maximum Security Environments the Administrator User Name and Password are configured after Secured Communication has been enabled.

**Table 1-2** *First Time Setup Worksheet (Continued)*

Parameter	Factory Default	Local Network Settings	Description
<b>Workstation for Direct Connection</b>			
<i>IP address</i>			The workstation's IP address should be in the same network neighborhood as the RMX's Control Unit IP address, but should not use any of the default IP addresses with which the RMX system is shipped to enable direct connection. See " <i>Default IP addresses with which the system is shipped to enable direct connection.</i> " on page <a href="#">1-21</a> .
<i>Subnet Mask</i>			
<i>Default Gateway</i>			



## Procedure 3: First Entry Configuration

The following procedures are necessary for setup of the new *Collaboration Server*. It is important that they are performed in the following sequence:

- 1 Register the RMX.
- 2 Obtain *Product Activation Key* for the RMX.
- 3 Download and install the *RMX Manager* onto a workstation.
- 4 Connect workstation to the *Default Management Network*.
- 5 Power up the RMX.
- 6 Login to the RMX
- 7 Activate the RMX product.
- 8 Modify the *Default Management Network*.
- 9 Configure the IP (*Signaling*) *Network Service*.
- 10 Configure the *ISDN/PSTN Network Service*.

### Register the RMX

Before the *Collaboration Server* can be used, it is necessary to register the product and obtain an *Activation Key*.

During first-time power-up, the *Product Activation* dialog box is displayed, requesting you to enter an *Activation Key*.

### Obtain Product Activation Key for the RMX

- 1 Access the *Service & Support* page of the Polycom website at: <http://portal.polycom.com>
- 2 Login with your *Email Address* and *Password* or register as a new user.
- 3 Select **Product Registration**.
- 4 Follow the on-screen instructions for *Product Registration* and *Product Activation*. (The RMX's serial number is on a sticker on the back of the unit, if needed.)
- 5 When the *Product Activation Key* is displayed, write it down or **copy** it for later pasting into the *Activation Key* field of the *Product Activation* dialog box.

### Download and Install the RMX Manager Onto a Workstation

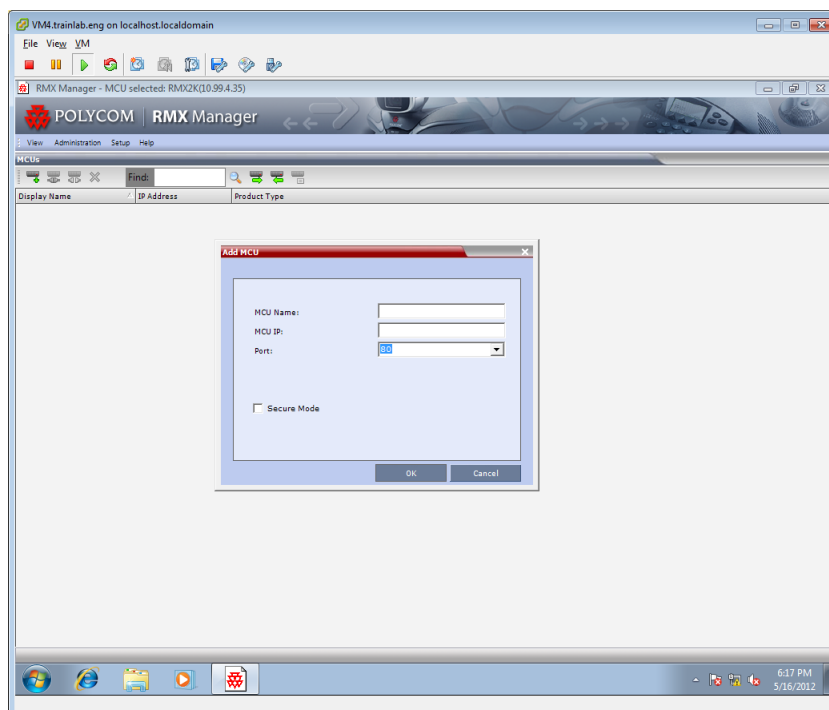
The RMX Manager is the recommended option for accessing the RMX's management console.

The *RMX Manager* specific to version 8.3.0.J can be downloaded from the *Support* section of the *Polycom* website at <http://www.polycom.com/forms/rmx-sw-fed-thankyou.html>

#### To install the RMX Manager:

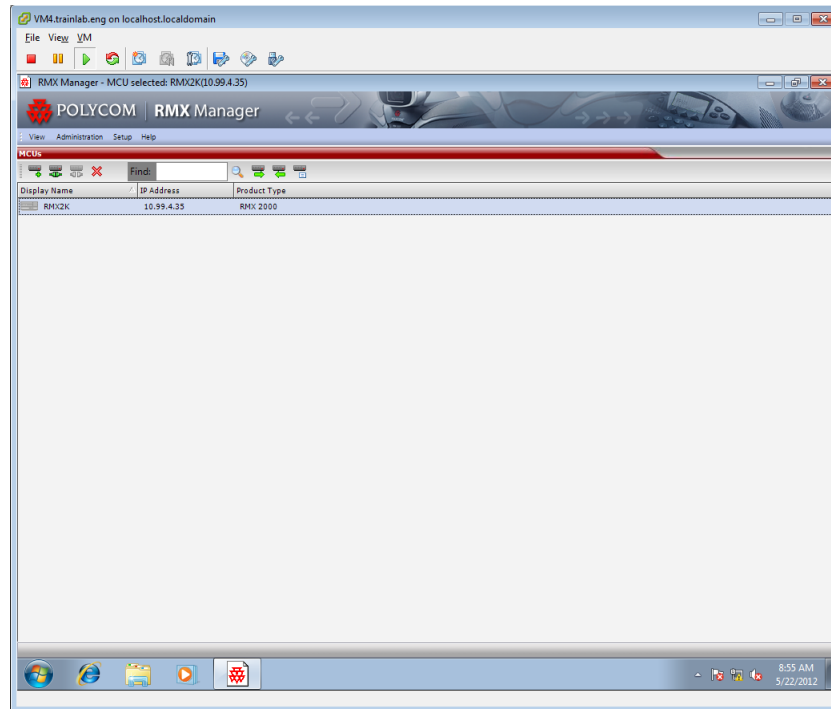
- 1 Obtain the *RMX Manager* specific to *Version 8.3.0.J* from the *Polycom Software Distribution* website.
- 2 Install the *RMX Manager* on the workstation:

- a Using *Windows*, navigate to the folder where the downloaded *RMX Manager* has been saved.
  - b Double-click on the downloaded install file and follow the on-screen instructions to complete the installation.
- 3 When the install of the *RMX Manager* is completed, launch the *RMX Manager* using the *Windows Start* menu.)

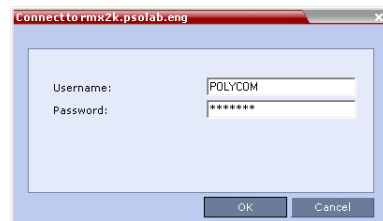


- 4 If needed, add the *MCU* to the *RMX Manager's* *MCUs* list if it was not pre-populated during installation.
- a Right-click in the *RMX Manager* window.
  - b Select **Add MCU**.
  - c Enter the *MCU Name*.
  - d Enter the *IP Address* of the *MCU*.
  - e Leave the port as *Port 80* until such time that the *RMX* is placed into *Secure Mode*.

f Click OK.



The *Username and Password* dialog box is displayed.



- 5 Enter the default *Username* - POLYCOM and default *Password* - POLYCOM.
- 6 Click OK.

## Connect the Workstation to the Default Management Network

Before powering up the *RMX* for the first time, it is necessary to establish a connection between the *RMX* and the control workstation.

A private network is set up between the *Collaboration Server* and the workstation and the *Default Management Network* parameters are modified using the *Fast Configuration Wizard* in the *RMX Manager*.

### Configuring the workstation for direct connection

The following procedures show how to modify the workstation's networking parameters using the *Windows New Connection Wizard*.

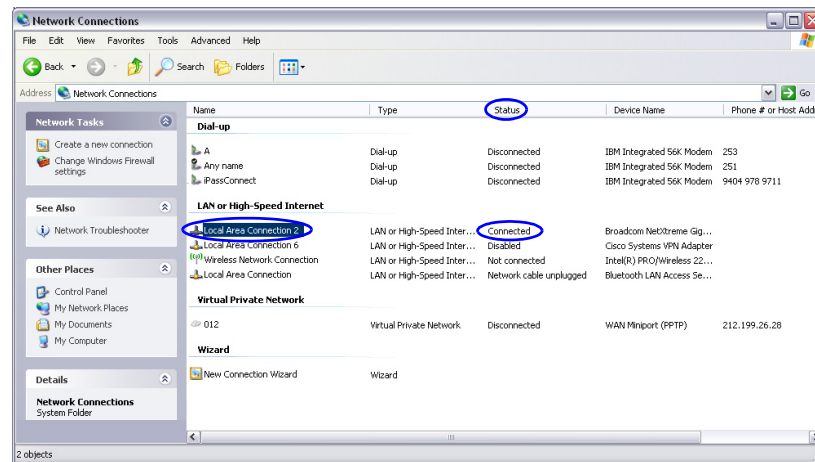
For non-Windows operating systems an equivalent procedure must be performed by the system administrator.

Before connecting directly, you must modify the *IP Address, Subnet Mask* and *Default Gateway* settings of the workstation to be compatible with either the *Collaboration Server's Default Management Network*.

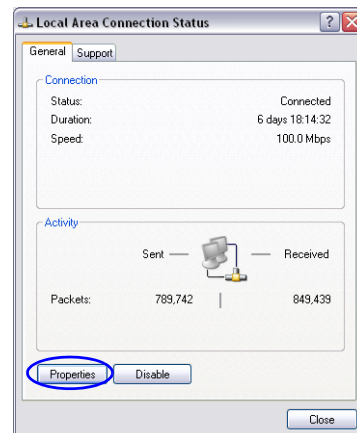
### To modify the workstation's IP addresses:

(It is recommended that workstation's settings be documented in order to reset it back to its original settings after it has been used for direct connection to the RMX.)

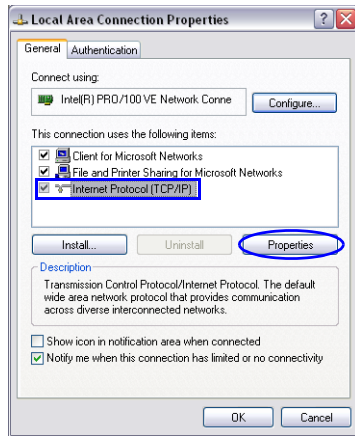
- 1 On the Windows *Start* menu, select **Settings > Network Connections**.
- 2 In the *Network Connections* window, double-click the **Local Area Connection** that has *Connected* status.



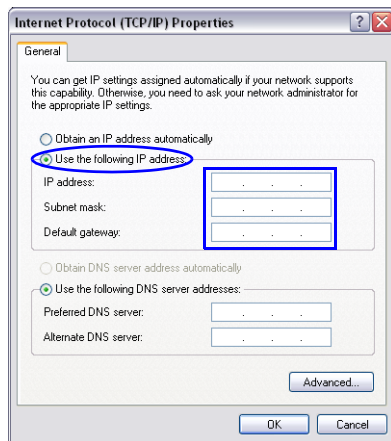
- 3 In the *Local Area Connection Status* dialog box, click the **Properties** button.



- 4 In the *Local Area Connection Properties* dialog box, select **Internet Protocol [TCP/IP] > Properties**.



- 5 In the *Internet Protocol (TCP/IP) Properties* dialog box, select **Use the following IP address**.
- 6 Enter the *IP address*, *Subnet mask* and *Default gateway* for the workstation.



The workstation’s IP address should be in the same network neighborhood as the *RMX’s Control Unit* IP address.

**Example:** *IP address* – near **192.168.1.nn**



None of the reserved IP addresses listed in *Table 1-3* should be used for the IP Address.

The *Subnet mask* and *Default gateway* addresses should be the same as those for the *RMX’s Default Management Network*.

The addresses needed for connection to the *Collaboration Server’s Default Management Network* are listed in *Table 1-3*.

**Table 1-3** Reserved IP Addresses

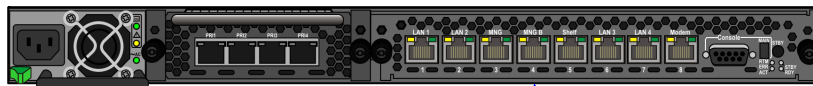
Network Entity	Default Management Network IP Addresses (Factory Default)
Control Unit IP Address	192.168.1.254
Control Unit Subnet Mask	255.255.255.0
Default Router IP Address	192.168.1.1
Shelf Management IP Address	192.168.1.252
Shelf Management Subnet Mask	255.255.255.0
Shelf Management Default Gateway	192.168.1.1

- 7 Click the **OK** button.

### Connect the Workstation to the RMX

- 8 Using a LAN cable, connect the workstation to the *LAN 2* port on the *RMX 2000/4000*'s back panel or the *MNGB Port* on the *RMX 1500*.

#### RMX 1500



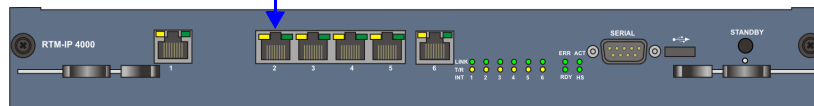
MNGB Port

#### RMX 2000



LAN 2 Port

#### RMX 4000

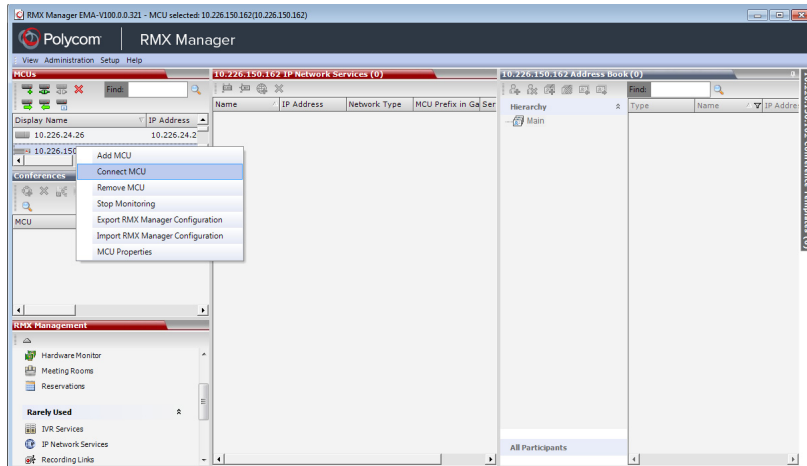



## Power up the RMX

>> Connect the power cable and power the **RMX ON**.

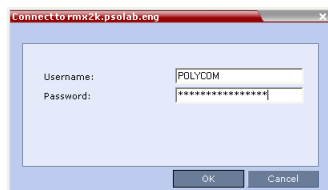
## Login to the RMX

In the *RMX Manager's* main screen:



- 1 Connect to the RMX using the *RMX Manager's* MCUs list, by one of the following methods:
  - a Double-click the *MCU* icon.
  - b Select the *RMX* to connect and click the **Connect MCU**  button.
  - c Right-click the *MCU* icon and then click **Connect MCU**.

The *Username / Password* dialog box is displayed.

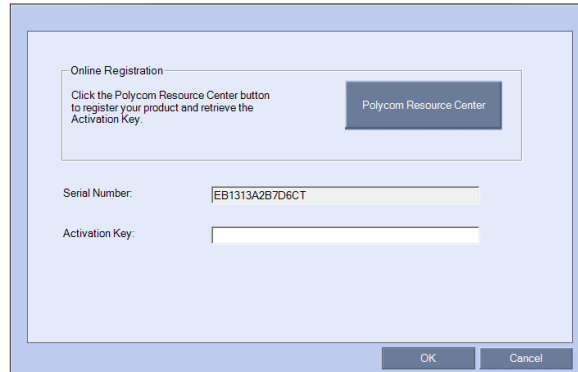


- 2 Enter the default *Username* (**POLYCOM**) and *Password* (**POLYCOM**) and click **OK**.



## Activate the RMX Product

The *RMX Manager* and the *Product Activation* dialog box is displayed with the serial number filled in:

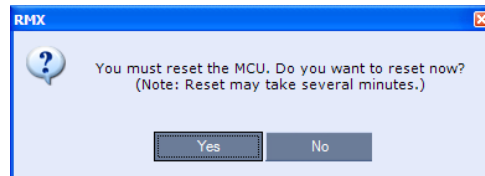


- 1 In the *Activation Key* field, enter or **paste** the *Product Activation Key* obtained earlier.
- 2 Click **OK**.

If you do not have an *Activation Key*, click **Polycom Resource Center** to access the *Service & Support* page of the Polycom website.

For more information, see "*Obtain Product Activation Key for the RMX*" on page **1-25**.

The system prompts with a restart dialog box:



- 3 In the dialog box, click **Yes**.

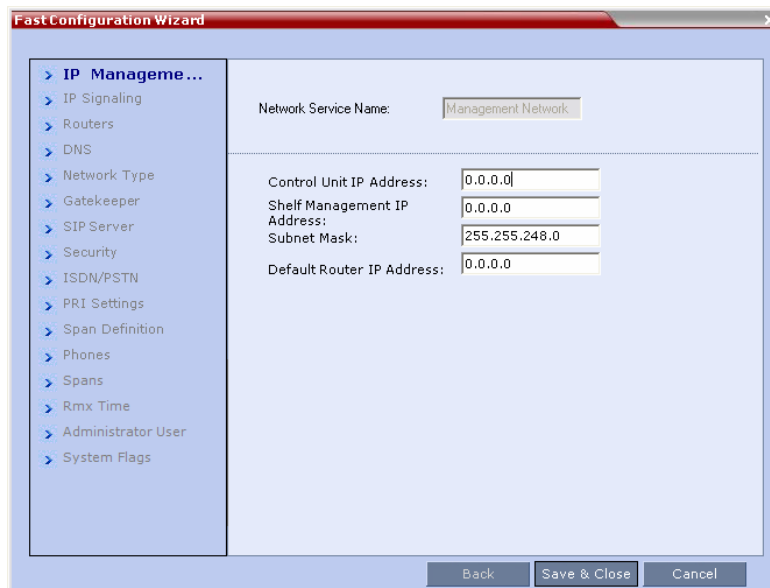
## Modify the Default Management Network

After the RMX resets, the *Fast Configuration Wizard* starts.



Both *IPv4* and *IPv6* are supported. For *IPv6* addressing information see the *RealPresence Collaboration Server (RMX) System Administrator's Guide, "IP Network Services"*.

If this is the *First Time Power-up* or the *Default IP Service* has been deleted and the RMX has been reset, the following dialog box is displayed:

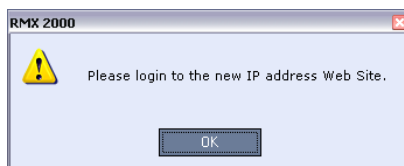


- 4 Enter the following parameters using the information supplied by your network administrator:

- *Control Unit IP Address*
- *Shelf Management IP Address*
- *Control Unit Subnet Mask*
- *Default Router IP Address*

- 5 Click the **Save & Close** button.

The system prompts you to sign in with the new *Control Unit IP Address*.




- 6 Disconnect the LAN cable between the workstation and the *LAN 2* port on the RMX's back panel.

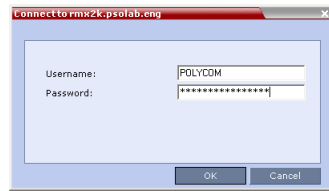
(The workstation can be configured back to its original network settings.)

- 7 Connect *LAN 2* port on the RMX's back panel to the local network using a LAN cable.

- 8 Connect to the RMX using the *RMX Manager's MCUs* list, by one of the following methods:

- a Double-click the *MCU* icon.
- b Select the RMX to connect and click the **Connect MCU**  button.
- c Right-click the *MCU* icon and then click **Connect MCU**.

The *Username / Password* dialog box is displayed.



- 9 Enter the default *Username* (**POLYCOM**) and *Password* (**POLYCOM**) and click **OK**.

## Modifying the Signaling Network Service

The *Fast Configuration Wizard* assists in configuring the *Signaling Network Service*. It starts automatically if no *Signaling Network Service* is defined. This happens during *First Time Power-up*, before the service has been defined or if the *Signaling Service* has been deleted, followed by an *RMX* restart.

The *IP Management Service* tab in the *Fast Configuration Wizard* is enabled only if the factory default *Management IP* addresses were not modified.



Both *IPv4* and *IPv6* are supported. For *IPv6* addressing information see the *RMX 1500/2000/4000 System Administrator's Guide*, "*IP Network Services*".

## Fast Configuration Wizard

- 1 Enter the required **IP Signaling** information in the dialog box.

### RMX 1500

### RMX 2000

### RMX 4000

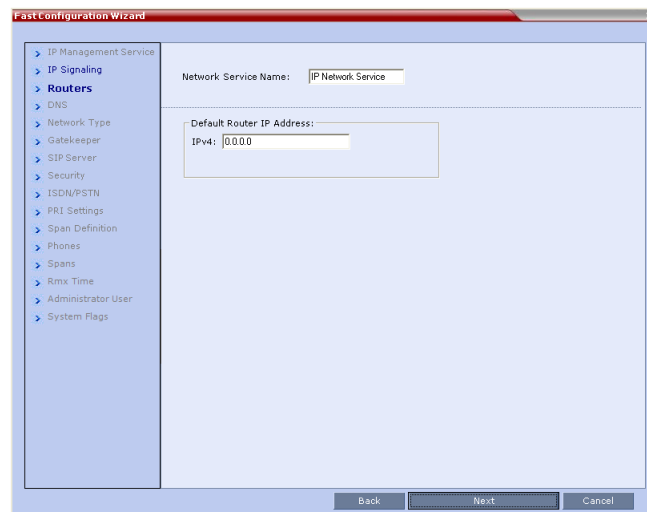
**Table 1-4** Signaling Network Service – IP Signaling

Field	Description
<i>Network Service Name</i>	The name <i>Default IP Service</i> is assigned to the Signaling Network Service by the Fast Configuration Wizard. This name can be changed. <b>Note:</b> This field is displayed in all IP Signaling dialog boxes and can contain character sets that use Unicode encoding.
<i>Signaling Host IP Address</i>	Enter the address to be used by IP endpoints when dialing into the MCU. Dial out calls from the Collaboration Server are initiated from this address. This address is used to register the Collaboration Server with a Gatekeeper or a SIP Proxy server.

**Table 1-4** Signaling Network Service – IP Signaling (Continued)

Field	Description
<i>Media Card 1-4 IP Addresses</i>	Enter the IP address(es) of the media card (s) (MPMx 1 and MPMx 2-4 (if installed)) as provided by the network administrator. Endpoints connect to conferences and transmit call media (video, voice and content) via these addresses.
<i>Subnet Mask</i>	Enter the subnet mask of the MCU. Default value: 255.255.255.0.

- 2 Click the **Next** button.
- 3 Enter the required **Routers** information in the dialog box.

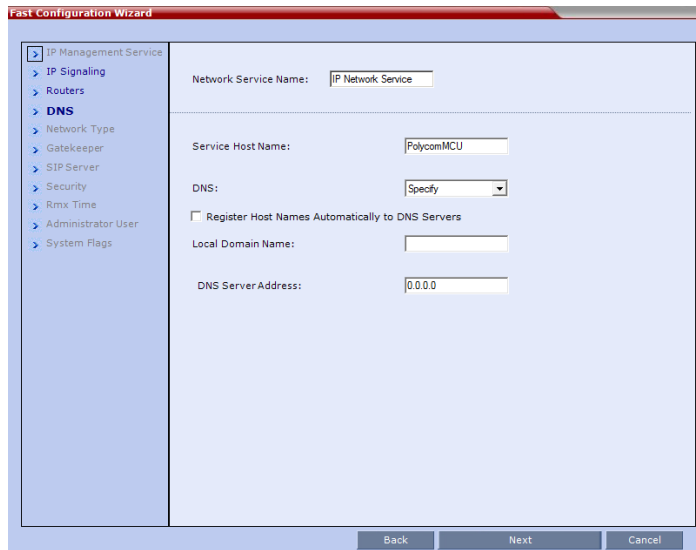
**Table 1-5** Signaling Network Service – Routers

Field	Description
<i>Default Router IP Address</i>	Enter the IP address of the default router. The default router is used whenever the defined static routers are not able to route packets to their destination. The default router is also used when host access is restricted to one default router.

- 4 Click the **Next** button.
- 5 Enter the required **DNS** information in the dialog box.



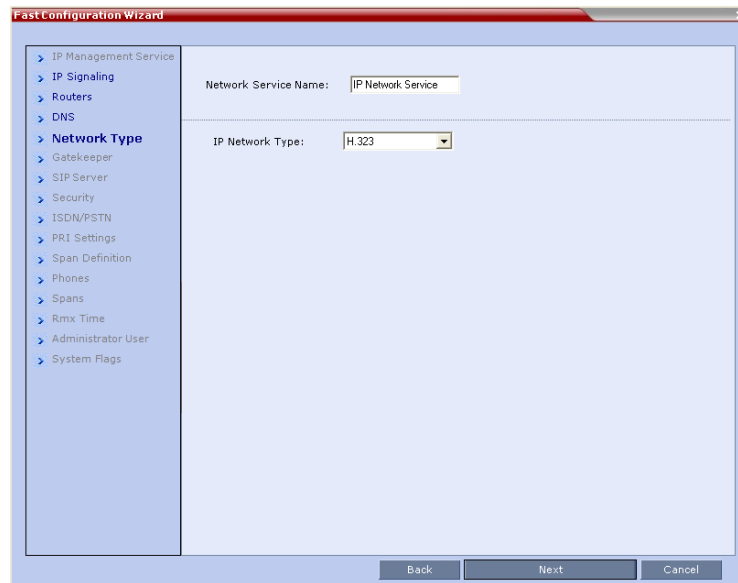
Settings in this dialog box pertain to the *Signaling Network*.



**Table 1-6** Fast Configuration Wizard – DNS

Field	Description
<i>Service Host Name</i>	Enter the FQDN of the MCU on the network. Default: <b>PolycomMCU</b> .
<i>DNS</i>	Select: <ul style="list-style-type: none"> <li>• <b>Off</b> – if DNS servers are not used in the network.</li> <li>• <b>Specify</b> – to enter the IP addresses of the DNS servers.</li> </ul> <b>Note:</b> The IP address fields are enabled only if <b>Specify</b> is selected.
<i>Register Host Names Automatically to DNS Server</i>	Select this option to automatically register the MCU Signaling Host and Shelf Management with the DNS server.
<i>Local Domain Name</i>	Enter the FQDN where the MCU is installed.
<i>DNS Server IP Address</i>	The static IP address of the primary DNS server.

- 6 Click the **Next** button.
- 7 Enter the required **Network Type** information in the dialog box.

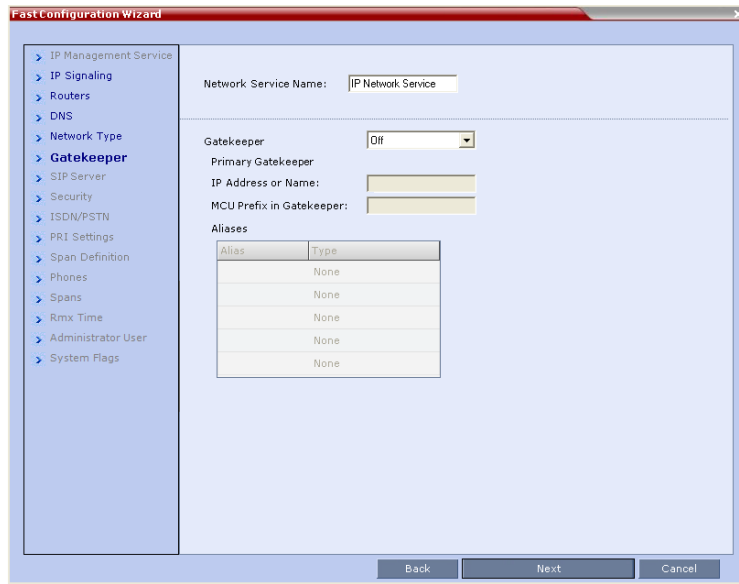


**Table 1-7** Signaling Network Service – IP

Field	Description
<i>IP Network Type</i>	Select a <i>Network Type</i> : <ul style="list-style-type: none"> <li>• H.323</li> <li>• SIP</li> <li>• H.323 &amp; SIP</li> </ul> <b>Note:</b> If <i>AS-SIP</i> is to be used, select <b>H.323 &amp; SIP</b>

- 8 Click the **Next** button.
- 9 If you selected **SIP** only, go to **Step 13**.

**10** Enter the required **Gatekeeper** information in the dialog box.



**Table 1-8** Signaling Network Service – Gatekeeper Parameters

Field	Description
<i>Gatekeeper</i>	Select <b>Specify</b> to enable configuration of the gatekeeper IP address. When <b>Off</b> is selected, all gatekeeper options are disabled.
<i>Primary Gatekeeper IP Address or Name</i>	Enter either the gatekeeper’s host name as registered in the DNS or IP address.
<i>MCU Prefix in Gatekeeper</i>	Enter the number with which this Network Service registers with the gatekeeper. This number is used by H.323 endpoints as the first part of their dial-in string when dialing the MCU. When PathNavigator or SE200 is used, this prefix automatically registers with the gatekeeper. When another gatekeeper is used, this prefix must also be defined in the gatekeeper.
<b>Aliases:</b>	
<i>Alias</i>	The alias that identifies the RMX’s Signaling Host within the network. Up to five aliases can be defined for each RMX. <b>Note:</b> When a gatekeeper is specified, at least one alias must be entered in the table. Additional aliases or prefixes may also be entered.



**Table 1-8** Signaling Network Service – Gatekeeper Parameters (Continued)

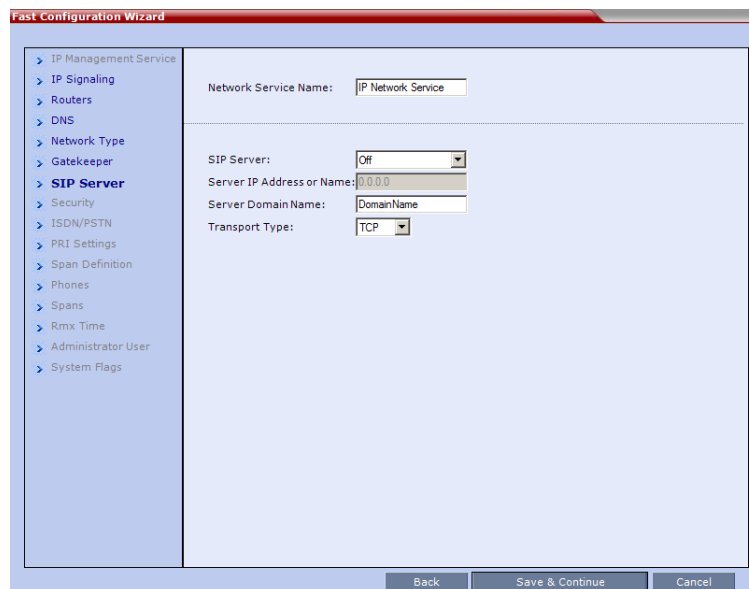
Field	Description
Type	<p>The type defines the format in which the card's alias is sent to the gatekeeper. Each alias can be of a different type:</p> <ul style="list-style-type: none"> <li>• H.323 ID (alphanumeric ID)</li> <li>• E.164 (digits 0-9, * and #)</li> <li>• Email ID (email address format, e.g. abc@example.com)</li> <li>• Participant Number (digits 0-9, * and #)</li> </ul> <p><b>Note:</b> Although all types are supported, the type of alias to be used depends on the gatekeeper's capabilities.</p>

- 11 Click the **Next** button.
- 12 If you selected **H.323**, click **Save & Continue**; otherwise click **Next** and go to **Step 13**.  
If you have selected **Save and Continue**, the IP Network Service is created and confirmed.



— Go to **Step 17**.

- 13 Leave the *SIP Server* field configured to **Off** - this will be changed later once the *Fast Configuration Wizard* has completed.



- 14 Click **Next**.

**15** Enter the required **Security** information in the dialog box.

The screenshot shows the 'Fast Configuration Wizard' window. On the left is a tree view with the following items: IP Management Service, IP Signaling, Routers, DNS, Network Type, Gatekeeper, SIP Server, **Security**, ISDN/PSTN, PRI Settings, Span Definition, Phones, Spans, Rmx Time, Administrator User, and System Flags. The 'Security' item is selected. The main area contains the following fields and options:

- Network Service Name:
- SIP Authentication
  - User Name:
  - Password:
- H.323 Authentication
  - User Name:
  - Password:

At the bottom of the window are three buttons: 'Back', 'Save & Continue', and 'Cancel'.

**Table 1-9** Default IP Network Service – Security (SIP Digest)

Field		Description	
<i>SIP Authentication</i>		Click this check box to enable SIP proxy authentication. Select this check box only if the authentication is enabled on the SIP proxy, to enable the Collaboration Server to register with the SIP proxy. If the authentication is enabled on the SIP proxy and disabled on the RMX, calls will fail to connect to the conferences. Leave this check box cleared if the authentication option is disabled on the SIP proxy.	These fields can contain up to 20 ASCII characters.
	<i>User Name</i>	Enter the user name the Collaboration Server will use to authenticate itself with the SIP proxy. This name must be defined in the SIP proxy.	
	<i>Password</i>	Enter the password the Collaboration Server will use to authenticate itself with the SIP proxy. This password must be defined in the SIP proxy.	
<i>H.323 Authentication</i>		Click this check box to enable H.323 server authentication. Select this check box only if authentication is enabled on the gatekeeper, to enable the Collaboration Server to register with the gatekeeper. If the authentication is enabled on the gatekeeper and disabled on the RMX, calls will fail to connect to the conferences. Leave this check box cleared if the authentication option is disabled on the gatekeeper.	
	<i>User Name</i>	Enter the user name the Collaboration Server will use to authenticate itself with the gatekeeper. This name must be defined in the gatekeeper.	
	<i>Password</i>	Enter the password the Collaboration Server will use to authenticate itself with the gatekeeper. This password must be defined in the gatekeeper.	

**16** Click **Save & Continue**.

The IP Network Service is created and confirmed.



17 Click **OK**.

## Configure the ISDN/PSTN Network Service

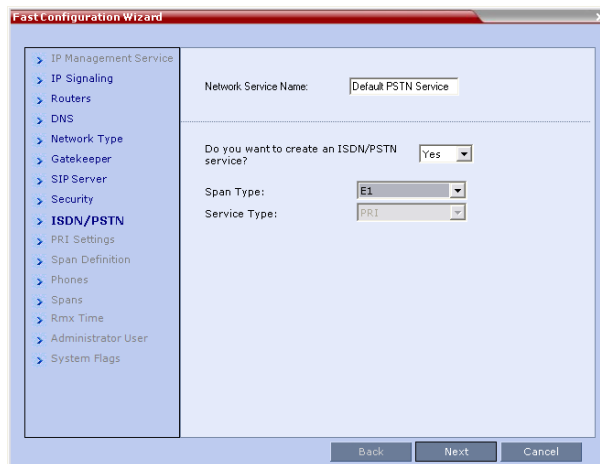
During the initial Collaboration Server setup, if the system detects the presence of the *RTM ISDN* card, the *ISDN/PSTN Network Service* definition screens of the *Fast Configuration Wizard* are enabled.

If there is no *RTM ISDN* card in the *RMX* or if you do not want to define an *ISDN/PSTN Network Service*, go to **Step 32**.



- The *RMX* does not support ISDN connections using restricted line rates (56k B channels).
- A new *ISDN/PSTN Network Service* can be defined even if no *RTM ISDN* card is installed in the system **but** only via the *ISDN/PSTN Network Service ->Add New Service* dialog box.

The *Fast Configuration Wizard's ISDN/PSTN* configuration sequence begins with the *ISDN/PSTN* dialog box:



18 Define the following parameters:

**Table 1-10** *Fast Configuration Wizard – ISDN Service Settings*

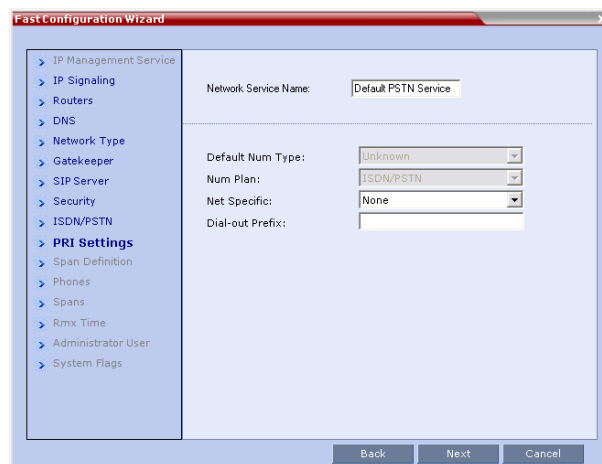
Field	Description
<i>Network Service Name</i>	Specify the service provider's (carrier) name or any other name you choose, using up to 20 characters. The <i>Network Service Name</i> identifies the <i>ISDN/PSTN Service</i> to the system. Default name: <i>ISDN/PSTN Service</i> <b>Note:</b> This field is displayed in all <i>ISDN/PSTN Network Properties</i> tabs and can contain character sets that use Unicode encoding.

**Table 1-10** Fast Configuration Wizard – ISDN Service Settings

Field	Description
<i>Span Type</i>	<p>Select the type of spans (ISDN/PSTN) lines, supplied by the service provider, that are connected to the RMX. Each span can be defined as a separate Network Service, or all the spans from the same carrier can be defined as part of the same Network Service.</p> <p>Select either:</p> <ul style="list-style-type: none"> <li>• <b>T1</b> (U.S. – 23 B channels + 1 D channel)</li> <li>• <b>E1</b> (Europe – 30 B channels + 1 D channel)</li> </ul> <p>Default: T1</p> <p><b>Note:</b> Only one <i>Span Type</i> (E1 or T1) is supported on the Collaboration Server. If you define the first span as type E1 all other spans that you may later define must also be of type E1.</p>
<i>Service Type</i>	PRI is the only supported service type. It is automatically selected.

**19** Click **Next**.

The *PRI Settings* dialog box is displayed.

**20** Define the following parameters:**Table 1-11** Fast Configuration Wizard – PRI Settings

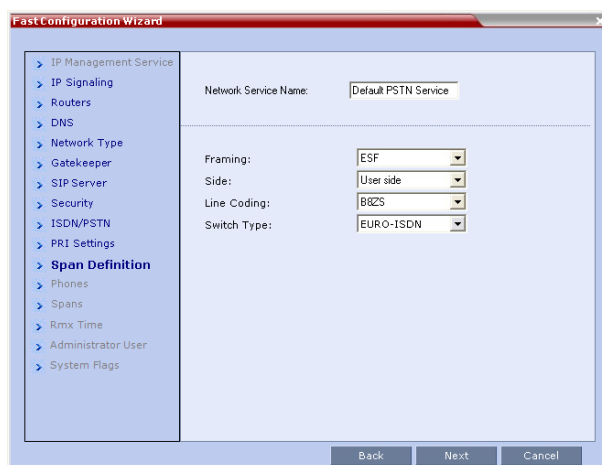
Field	Description
<i>Default Num Type</i>	<p>Select the Default Num Type from the list.</p> <p>The Num Type defines how the system handles the dialing digits. For example, if you type eight dialing digits, the Num Type defines whether this number is national or international.</p> <p>If the PRI lines are connected to the RMX via a network switch, the selection of the Num Type is used to route the call to a specific PRI line. If you want the network to interpret the dialing digits for routing the call, select <b>Unknown</b>.</p> <p>Default: Unknown</p> <p><b>Note:</b> For E1 spans, this parameter is set by the system.</p>

**Table 1-11** Fast Configuration Wizard – PRI Settings (Continued)

Field	Description
<i>Num Plan</i>	Select the type of signaling (Number Plan) from the list according to information given by the service provider. Default: ISDN <b>Note:</b> For E1 spans, this parameter is set by the system.
<i>Net Specific</i>	Select the appropriate service program if one is used by your service provider (carrier). Some service providers may have several service programs that can be used. Default: None
<i>Dial-out Prefix</i>	Enter the prefix that the PBX requires to dial out. Leave this field blank if a dial-out prefix is not required. The field can contain be empty (blank) or a numeric value between <b>0</b> and <b>9999</b> . Default: Blank

**21** Click **Next**.

The *Span Definition* dialog box is displayed.



**22** Define the following parameters:

**Table 1-12** Fast Configuration Wizard – Spans Definition

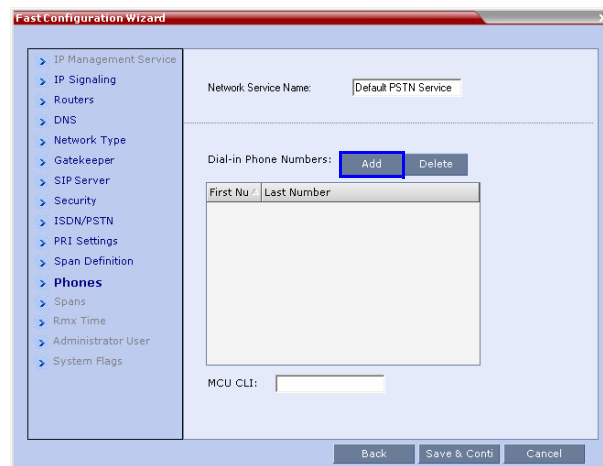
Field	Description
<i>Framing</i>	Select the Framing format used by the carrier for the network interface from the list. <ul style="list-style-type: none"> <li>For T1 spans, default is SFBSF.</li> <li>For E1 spans, default is FEBSF.</li> </ul>

**Table 1-12** Fast Configuration Wizard – Spans Definition

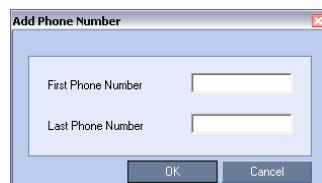
Field	Description
<i>Side</i>	Select one of the following options: <ul style="list-style-type: none"> <li>• User side (default)</li> <li>• Network side</li> <li>• Symmetric side</li> </ul> <p><b>Note:</b> If the PBX is configured on the network side, then the Collaboration Server unit must be configured as the user side, and vice versa, or both must be configured symmetrically.</p>
<i>Line Coding</i>	Select the PRI line coding method from the list. <ul style="list-style-type: none"> <li>• For T1 spans, default is B8ZS.</li> <li>• For E1 spans, default is HDB3.</li> </ul>
<i>Switch Type</i>	Select the brand and revision level of switch equipment installed in the service provider's central office. <ul style="list-style-type: none"> <li>• For T1 spans, default is AT&amp;T 4ESS.</li> <li>• For E1 spans, default is EURO ISDN.</li> </ul> <p><b>Note:</b> For T1 configurations in Taiwan, Framing must be set to <i>ESF</i> and Line Coding to <i>B8ZS</i>.</p>

**23** Click **Next**.

The *Phones* dialog box is displayed.

**24** Click **Add** to define dial-in number ranges.

The *Add Phone Number* dialog box is displayed.



- 25 Define the following parameters:

**Table 1-13** Fast Configuration Wizard – Add Phone Numbers

Field	Description
<i>First Number</i>	The first number in the phone number range.
<i>Last Number</i>	The last number in the phone number range.



- A range must include at least two dial-in numbers.
- A range cannot exceed 1000 numbers.

- 26 Click **OK**.

The new range is added to the *Dial-in Phone Numbers* table.

- 27 **Optional.** Repeat steps 24 to 25 to define additional dial-in ranges.

- 28 In the *Phones* tab enter the *MCU CLI (Calling Line Identification)*.

With dial-in connections, the *MCU CLI* indicates the MCU's number dialed by the participant. In a dial-out connection, indicates the MCU (*CLI*) number as seen by the participant.

- 29 Click **Save & Continue**.

After clicking **Save & Continue**, you cannot use the **Back** button to return to previous configuration dialog boxes.

The *ISDN/PSTN Network Service* is created and is added to the *ISDN/PSTN Network Services* list.

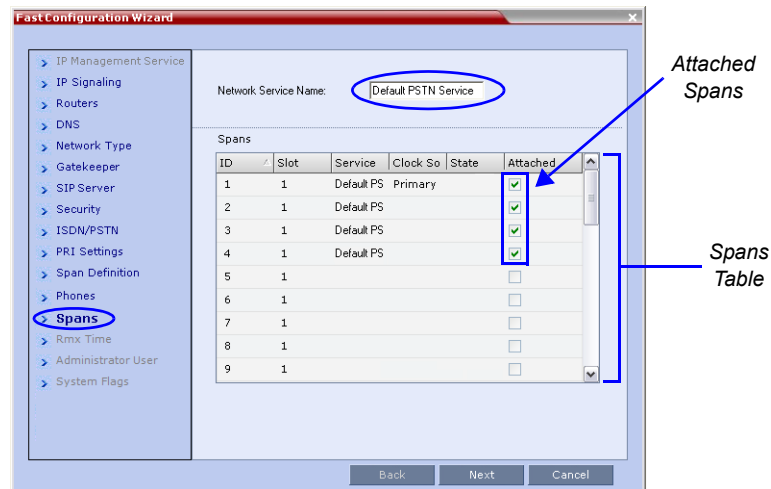
If the system cannot create the *ISDN/PSTN Network Service*, an error message is displayed indicating the cause and allowing you access the appropriate dialog box in the *Fast Configuration Wizard* for corrective action.



- 30 Click **OK** to continue the configuration.



The *Spans* dialog box opens, displaying the following read-only fields:



- **ID** – the connector on the *ISDN RTM* card (*PRI1* to *PRI12*).
- **Slot** – the *MPMx* card that the *ISDN RTM* card is connected to (*MPM 1* or *MPM 2*).
- **Service** – the *ISDN/PSTN Network Service* to which the span is assigned.
- **Clock Source** – indicates if *ISDN* signaling synchronization is being supplied by the *Primary* or *Secondary* clock source. The first span to synchronize becomes the *Primary* clock source.
- **State** – the *System Alert* level of the span (*Major*, *Minor*). If there are no span related alerts, this column contains no entries.

- 31** Click the check boxes in the *Attached* field to attach spans (*E1* or *T1 PRI* lines) to the network service named in the *Network Service Name* field.

The *Spans Table* displays the configuration of all spans and all *ISDN* network services in the system.

When using the *Fast Configuration Wizard* during *First Entry Configuration*, you are defining the first *ISDN/PSTN Network Service* in the system. Spans can only be attached to this service.

Additional *ISDN/PSTN Network Services* can be defined by using the **ISDN/PSTN Network Services > New PSTN Service** button in the *RMX Manager*.

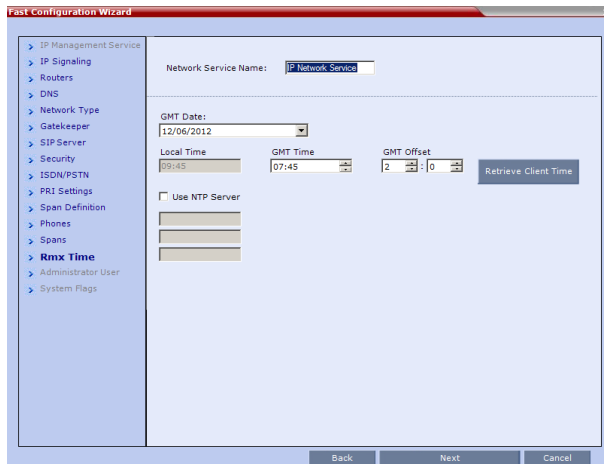
Spans can be attached to, or moved between *ISDN* network services by using the **ISDN/PSTN Network Services > ISDN Properties > Spans** tab in the *RMX Manager*.

- **RMX 2000/4000** - Each *ISDN RTM* card can support either 7 *E1* or 9 *T1 PRI* lines.
- **RMX 1500** - Either 4 *E1* or 4 *T1 PRI* lines are supported.

*E1* and *T1* connections cannot be used simultaneously.

- 32** Click **Next**.

The *RMX Time* dialog box is displayed.



- 33** Set the *RMX Time* using one of the three available options: setting the *RMX Time* manually, clicking the *Retrieve Client Time* button, or using the *NTP Servers* options.

**Table 1-14** Fast Configuration Wizard - Collaboration Server Time

Field	Description
<i>GMT Date</i>	The date at Greenwich, UK.
<i>Local Time</i>	The MCU's local time settings, are calculated from the <i>GMT Time</i> and the <i>GMT Offset</i> .
<i>GMT Time</i>	Displays the MCU's current <i>GMT Time</i> settings. <b>Option 1:</b> Manually setting the Collaboration Server time: <ul style="list-style-type: none"> <li>Using the <i>Up</i> or <i>Down</i> arrows alter the <i>GMT Time</i> and the <i>GMT Offset</i> to set the Collaboration Server time.</li> </ul>
<i>GMT Offset</i>	The time zone difference between Greenwich and the MCU's physical location. <ul style="list-style-type: none"> <li>Using the <i>Up</i> or <i>Down</i> arrows manually modify the <i>GMT Offset</i> time on the Collaboration Server.</li> </ul>
<i>Retrieve Client Time</i>	<b>Option 2:</b> Automatically setting the MCU time: <ul style="list-style-type: none"> <li>Click this button to automatically update the MCU's <i>GMT Date</i>, <i>Time</i> and <i>Offset</i> to match that of the workstation.</li> </ul>

**Table 1-14** Fast Configuration Wizard - Collaboration Server Time (Continued)

Field	Description
Use NTP Server	<p><b>Option 3:</b> Setting the MCU time by synchronizing with external NTP servers:</p> <ul style="list-style-type: none"> <li>Select this check box to synchronize the time with up to three external <i>NTP</i> servers. Once selected, you must enter the IP address of at least one external <i>NTP</i> server to implement this mode.</li> <li>Enter the IP addresses of the required <i>NTP</i> servers in order of precedence.</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>When this option is selected, the manual <i>GMT Date</i> and <i>GMT Time</i> setting options are disabled. The <i>GMT Offset</i> fields are still active.</li> <li>The <i>RealPresence Server</i> will not use a time source such as a <i>Windows</i>-based, <i>W32Time</i> service (<i>SNTP</i>) time service. Only full-featured (<i>Stratum 16</i> or below) <i>NTP</i> Servers are considered sufficiently reliable for high-accuracy timing environments.</li> <li>The <i>Status</i> fields in <b>Settings &gt; RMX Time</b> indicate whether time retrieval from the <i>NTP Server(s)</i> succeeded or failed.</li> </ul>

**34** Click **Next**.

The *Administrator User* dialog box is displayed.



The *Administrator User Name* and *Password* are configured in *Procedure 12*, after *Secured Communication* has been enabled.

If the default *POLYCOM* user is defined, an active alarm is displayed and the MCU status changes to *Major* until the administrator changes the default username and password.

**35** Click **Next**.

The *System Flags* dialog box is displayed

**36** Enter the required **System Flags** information in the dialog box.

Fast Configuration Wizard

IP Management Service  
 IP Signaling  
 Routers  
 DNS  
 Network Type  
 Gatekeeper  
 SIP Server  
 Security  
 ISDN/PSTN  
 PRI Settings  
 Span Definition  
 Phones  
 Spans  
 Rmx Time  
 Administrator User  
 **System Flags**

Network Service Name: IP Network Service

Conference ID Length (MCU-assigned): 5

Minimum Conference ID Length (User-assigned): 4

Maximum Conference ID Length (User-assigned): 16

MCU Display Name: POLYCOM RMX 2000

Terminate Conference when Chairperson Exits: No

Auto Extend Conferences: Yes

Back Save & Close Cancel

**Table 1-15** Signaling Network Service – System Flags

Flag	Description / Default	
<i>Conference ID Length (MCU)</i>	The number of digits of the Conference ID to be assigned by the MCU. Range: 2-16 (Default: 5)	<b>Note:</b> Selecting 2 digits limits the number of simultaneous ongoing conferences to 99.
<i>Minimum Conference ID Length (User)</i>	The minimum number of digits that the user must enter when manually assigning a numeric ID to a conference. Range: 2-16 (Default: 4)	
<i>Maximum Conference ID Length (User)</i>	The maximum number of digits that the user can enter when manually assigning a Numeric ID to a conference. Range: 2-16 (Default: 8)	<b>Note:</b> Selecting 2 digits limits the number of simultaneous ongoing conferences to 99.
<i>MCU Display Name</i>	The MCU name is displayed on the endpoint's screen. Default name: <i>RMX 1500, Polycom RMX 2000 or Polycom RMX 4000.</i>	
<i>Terminate Conference when Chairperson Exits</i>	When <b>Yes</b> is selected (default), the conference ends when the chairperson exits even if there are other participants connected. When <b>No</b> is selected, the conference automatically ends at the predefined end time, or when all the participants have disconnected from the conference.	
<i>Auto Extend Conferences</i>	When <b>Yes</b> is selected (default), allows conferences running on the RMX to be automatically extended as long as there are participants connected and there are available resources. The maximum extension time allowed by the MCU is 30 minutes.	

- 37 Click **Save & Close**.  
The RMX confirms successful configuration.
- 38 In the *Success Message* box, click **OK**.
- 39 In the *Reset Confirmation* dialog box, click **Yes**.
- 40 In the *Please wait for system reset* message box, click **OK**.



System restart may take up to five minutes.

- 41 In the *RMX Manager's MCUs* list, periodically highlight the RMX and then select **Connect MCU**. When the system has restarted and is back online the *Login Banner* will be displayed and you will be able to logon.
- 42 When the *Login* screen is displayed, enter your *Username* and *Password* and click **Login**.  
On first entry, the default *Username* and *Password* are both **POLYCOM**.  
The system is now fully configured and if there are no *System Errors*, the green RDY LED on the CNTL module on the RMX's front panel turns ON.

### Configure the DNS for the Management Network:

- 43 In the *RMX Management* pane, click the **IP Network Services** button.
- 44 In the *IP Network Services* list pane, double-click **Management Network**.  
When the *Management Network Properties - IP* dialog box opens, click the **DNS** tab.

- 45 Modify the following fields:

**Table 1-16** Default Management Network Service – DNS

Field	Description
<i>MCU Host Name</i>	Enter the <i>FQDN</i> of the <i>MCU</i> on the network.
<i>DNS</i>	Select <b>Specify</b> . <b>Note:</b> The IP address fields are enabled only if <b>Specify</b> is selected.

**Table 1-16** Default Management Network Service – DNS (Continued)

Field	Description
<i>Register Host Names Automatically to DNS Servers</i>	Select this option to automatically register the <i>MCU Signaling Host</i> and <i>Shelf Management</i> with the <i>DNS</i> server.
<i>Local Domain Name</i>	Enter the <i>FQDN</i> of the domain where the <i>MCU</i> is installed.
<i>DNS Servers Addresses:</i>	
<i>Primary Server</i>	The static <i>IP</i> addresses of the <i>DNS</i> servers. A maximum of three servers can be defined.
<i>Secondary Server</i>	
<i>Tertiary Server</i>	



The *MCU Host Name* and *Local Domain Name* must be the same. If the content of these two fields are not identical an *Active Alarm* is created.

## Procedure 4: Enable Ultra Secure Mode

The *Ultra Secure Mode* is disabled by default and can be enabled by adding the **ULTRA\_SECURE\_MODE** *System Flag* and setting its value to **YES** using the **Setup > System Configuration** menu. After modifying the value of the **ULTRA\_SECURE\_MODE** *System Flag* to **YES**, all RMX users are forced to change their *Login* passwords.

**To add and enable ULTRA\_SECURE\_MODE System Flag:**

- 1 On the RMX menu, click **Setup > System Configuration**.

The *System Flags* dialog box is displayed.

- 1 In the *System Flags* dialog box, click the **New Flag** button.

The *New Flag* dialog box is displayed.

- 2 In the *New Flag* field enter the flag name: **ULTRA\_SECURE\_MODE**.
- 3 In the *Value* field enter the flag value: **YES**.
- 4 Click the **OK** button to close the *Update Flag Value* dialog box.
- 5 Click the **Close** button to close the *System Flags* dialog box.
- 6 In the *Reset Confirmation* dialog box, click **Yes**.

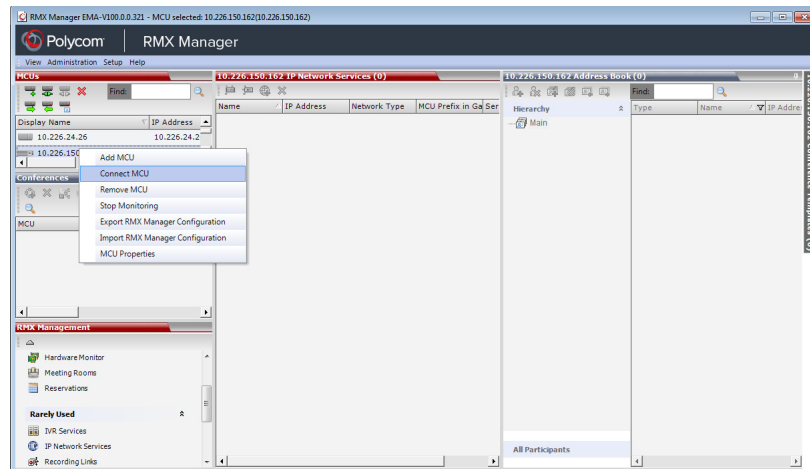
- 7 In the *Please wait for system reset* message box, click **OK**.



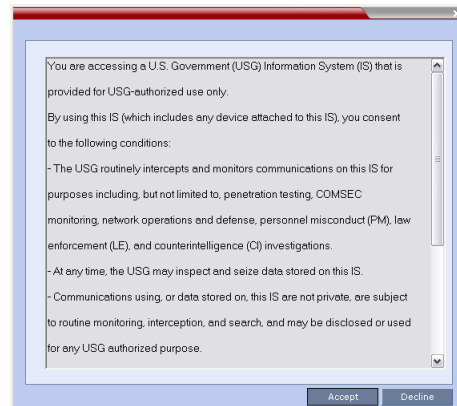
System restart may take up to five minutes.

## Connecting to the RMX

- 1 After the system has restarted, log back into the *RMX* using the *RMX Manager* and connect to the *RMX*.  
(In the *MCUs* list, periodically highlight the *RMX* and then select **Connect MCU**.  
When the system has restarted and is back online the *Login Banner* will be displayed and you will be able to logon.)



The *DoD* warning banner is displayed.



- 2 Click **Accept**

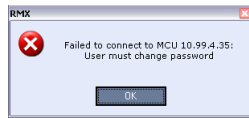
The *Username / Password* dialog box is displayed.



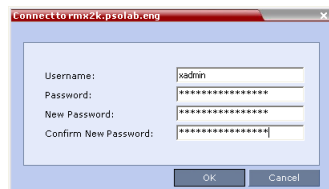
- 3 Enter the *Username* and *Password*.

4 Click **OK**.

The system will notify you that you must change the password.



5 Click **OK**.



6 Enter the new *Username*.

7 Enter the old *Password*.

8 Enter the *New Password*.

9 Confirm the *New Password*.

10 Click **OK**.



If the value of the `ULTRA_SECURE_MODE` System Flag is YES, only TLS mode connections are permitted. If the Management Network Service has not yet been configured to be secured, an Active Alarm is created and a message is displayed stating that Secured Communications Mode must be enabled. For more information, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*, "Secure Communication Mode".

## Procedure 5: Enable Network Separation (RMX 2000)



This procedure is only applicable to the *RMX 2000* - Network Separation on the *RMX 1500* and *RMX 4000* is done differently and will have been already done in a previous procedure. For more information see "*Connecting Cables to the RMX 1500*" on page [1-11](#) and "*Connecting Cables to the RMX 4000*" on page [1-19](#).

If you are installing an *RMX 1500* or *RMX 4000* skip to "*Procedure 6: Enable Secured Communication*".



The the `SEPARATE_MANAGEMENT_NETWORK` System Flag is not relevant to *RMX 1500* and *RMX 4000* systems which are designed with separate ports and networks for signaling, management and media.

The *RMX 2000*, prior to the *Network Separation* procedure, hosts all signaling, management, and media traffic via the LAN 2 port.

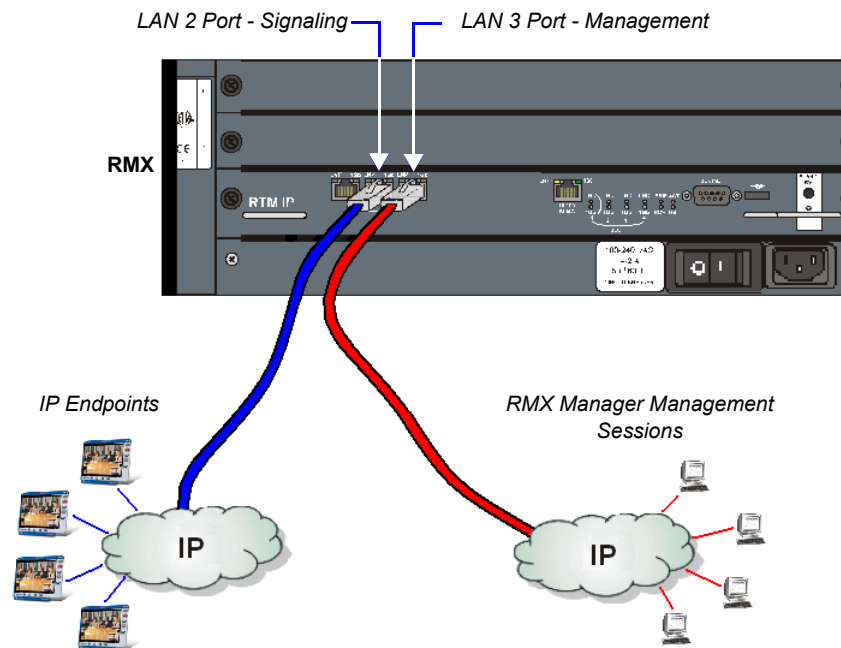


*Network Separation* is enabled/disabled according to the setting of the **SEPARATE\_MANAGEMENT\_NETWORK** *System Flag*. When the *System Flag* is set to **YES**, media and signaling traffic between IP endpoints and the RMX is hosted via the **LAN 2** port, while RMX management sessions are hosted via the **LAN 3** port. .



Before plugging network cables in, ensure sure that the network infrastructure containing all the devices (including the RMX) has two different networks: one for *Management*; the other for *Signaling & Media*. Separation can be achieved either by two physical networks or by two virtual networks (VLANs).

## Enabling Network Separation



**Figure 2** Signaling and Management Network Separation

### To enable network separation:

- 1 On the RMX menu, click **Setup > System Configuration**.  
The *System Flags* dialog box is displayed.
- 2 Locate and double-click on the **SEPARATE\_MANAGEMENT\_NETWORK** *System Flag* entry.  
The *Update Flag Name* dialog box is displayed.
- 3 In the *New Value* field, enter **YES**.
- 4 Click the **OK** button to close the *Update Flag Name* dialog box.
- 5 Click the **OK** button to close the *System Flags* dialog box.
- 6 In the *Reset Confirmation* dialog box, click **No**.
- 7 In the *Collaboration Server Management* pane, click the **IP Network Services** (🌐) button.
- 8 In the *IP Network Services* list pane, right-click the **Management Network** (🌐) entry and select **Properties**.

- 9 Enter the *Control Unit IP*, *Shelf Management IP* and *Subnet Mask* addresses in their respective field boxes.
- 10 Click the **Routers** tab.
- 11 Enter the *Default Router IP Address*.
- 12 Click the **OK** button.  
A *Reset Confirmation* dialog box is displayed.
- 13 Connect a workstation that is connected to the Management LAN to the RMX's **LAN 3** port.
- 14 In the *Reset Confirmation* dialog box, click **Yes**.



System restart may take up to five minutes.

- 15 On the workstation that was connected to the RMX in **Step 13**, start the *RMX Manager* application:
  - a In the browser's address line, enter the *Control Unit IP Address* in the format:  
`https://<Control Unit IP Address>`.
  - b Press **Enter**.
- 16 Connect to the RMX. See "*Connecting to the RMX*" on page **1-55**.

## Procedure 6: Enable Secured Communication

If the **ULTRA\_SECURE\_MODE** *System Flag* is set to YES, a valid *TLS* certificate must be installed, and a secured connection between the *RMX Manager* and the RMX unit must be defined.

- If the **ULTRA\_SECURE\_MODE** *System Flag* is set to YES and the *Management Network Service* has not yet been configured to be secured, an *Active Alarm* is created and a message is displayed stating that *Secured Communications Mode* must be enabled.
- If the **ULTRA\_SECURE\_MODE** *System Flag* is set to YES and *Secured Communications Mode* is enabled, the user is not able to disable *Secured Communications Mode*. An error message is displayed stating that *Secured Communications Mode* cannot be disabled while in *Ultra Secure Mode*.
- *TLS* private keys saved by the current version when the **ULTRA\_SECURE\_MODE** *System Flag* is set to YES are not compatible with *TLS* private keys saved by previous RMX versions. An *Active Alarm* is created and a message is displayed requesting that a new *TLS* certificate be installed.
- *TLS* private keys saved by the current version will be compatible with *TLS* private keys saved by future RMX versions.

## Installing Certificates and Enabling Secure Communications

Participation in a *Public Key Infrastructure* requires the RMX system to have been configured with at least one *CA* certificate, and a digital certificate signed by that *CA* which identifies the RMX.

Often, however, additional *CA* certificates will be needed to allow the system to properly validate a received certificate.

Using the following checklist, work with your network administrator to gather all required certificates needed for use in the environment:

- **RMX Identity Certificates** - One for the *Management* interface and one for the *Signaling* interface created by the system via the *Certificate Signing Request (CSR)* procedure described below and signed by a *CA* within your network infrastructure.
- **CA Certificate** - For the *CA* that signs the *RMX Identity Certificates*.
- **Root CA Certificate** - This is the certificate for the root of the *CA* hierarchy.
- **Intermediate CA Certificates** - For all *CAs* between the root *CA* and the *CA* that signs the *RMX* certificates.
- **OCSP Responder Certificate** - Used to validate responses from the *OCSP* responder. For more information see "*Certificate Revocation*" on page **1-68**.

**The following operations are required to switch the RMX to Secure Mode:**

The *RMX* uses a separate certificate for the:

- *Management Network* interface
- *Signaling Network* interface

It is important that **both** certificates are installed.

*RMX* certificates are used for both:

- *TLS* client connections
- *TLS* server connections

It is important that the certificate template used on the *CA* enables both *clientAuth* and *serverAuth* use in the *Extended Key Usage (EKU)* field of the certificate. The related bits in the *Key Usage* extension should be set accordingly. Using *RFC 5280* for more information, work with the administrator of the *CA* to assure that these parameters are set correctly.

- Purchase and install the necessary *SSL/TLS* certificates:
  - *Certificate*
  - *CA Certificate(s)*
  - *CRL*

Certificates are managed using the *Certification Repository* dialog box accessed through the *RMX Manager, Setup* menu.

- Modify the *Management Network* settings

For more information see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Release Notes for Maximum Security Environments, "(PKI) Public Key Infrastructure"*.

## Installing a Certificate

Once a certificate is purchased and received it is stored in the *RMX* and used for all subsequent secured connections.

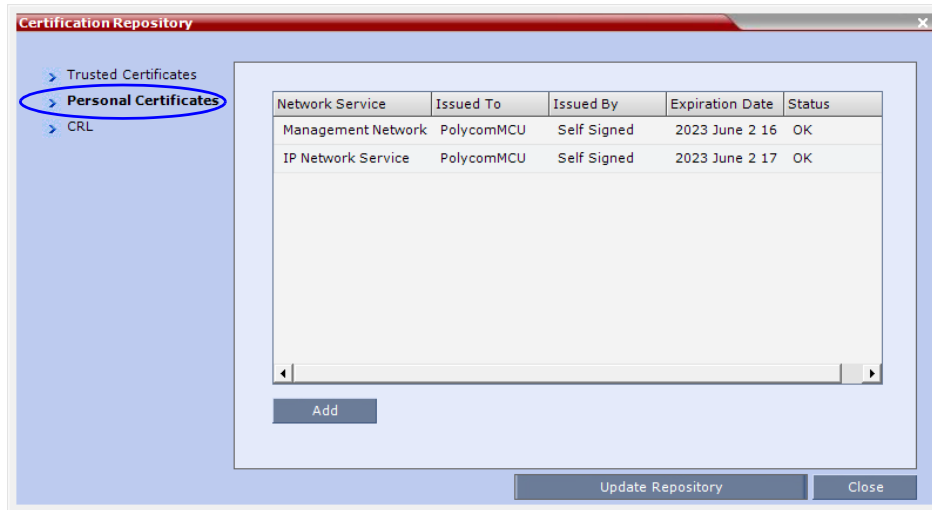


Certificates must be installed for both the *Management* and *IP Network Services*.

### To install a certificate:

- 1 In the *RMX* menu, click **Setup > RMX Secured Communications > Certificate Repository**.

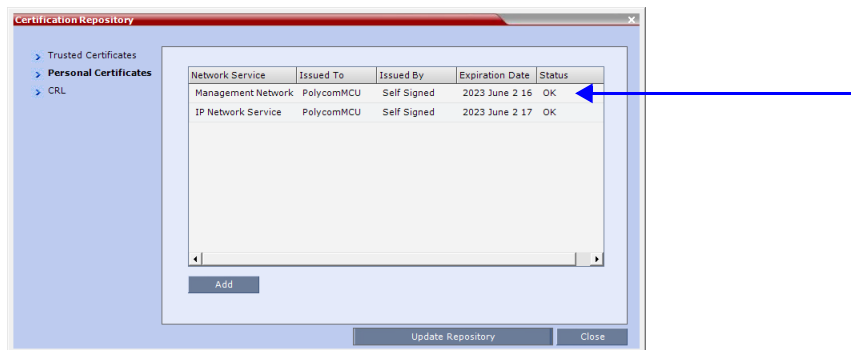
The *Certificate Repository* dialog box is displayed.



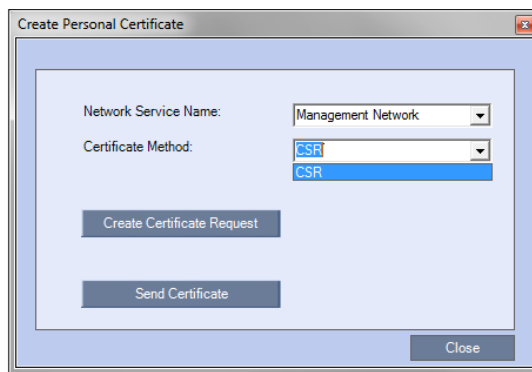
- 2 Click the **Personal Certificates** tab.

### Installing Certificates for the Management Network Service

- 3 In the *Certificate Repository* dialog box, select **Management Network Service**.



- 4 Click **Add**.
- 5 The *Create Personal Certificate* dialog box is displayed:



- 6 Click **Create Certificate Request**.

The **Create Certificate Request** details dialog box is displayed:

- 7 Enter information in all the following fields:

**Table 1-17** Create Certificate Request

Field	Description
Country Name	Enter any 2 letter code for the country name.
<i>State or Province</i>	Enter the full name of the state or province.
<i>Locality</i>	Enter the full name of the town/city/location.
<i>Organization</i>	Enter the full name of your organization for which the certificate will be issued.
<i>Organizational Unit</i>	Enter the full name of the unit (group or division) for which the certificate will be issued.
<i>Common Name (DNS/ IP)</i>	Enter the <i>DNS MCU Host Name</i> . This <i>MCU Host Name</i> must also be configured in the <i>Management Network Properties</i> dialog box.

**Table 1-17** Create Certificate Request (Continued)

Field	Description
<i>Subject Alternative Name (SAN)</i>	<p>This field is required when using EAP-TLS in conjunction with a Network Policy Server (MS-NPS). It allows the optional inclusion of:</p> <ul style="list-style-type: none"> <li>• <i>Principle Name</i></li> <li>• <i>DNS Name:</i></li> <li>• <i>Long – FQDN</i></li> <li>• <i>Short - Host only</i></li> <li>• <i>IP Address (IPv4 and IPv6)</i></li> </ul> <p><b>Examples:</b>  <i>Principal Name=RMX@EXAMPLE.COM</i>  <i>DNS Name=RMX.EXAMPLE.COM</i>  <i>DNS Name=RMX</i>  <i>DNS Name=192.168.100.100</i>  <i>IP Address=192.168.100.100</i>  <i>DNS Name=2001:DB8:1::100</i>  <i>IP Address=2001:DB8:1::100</i></p> <p>When the Subject Alternative Name (SAN) check box is selected the input box becomes active, allowing the user to modify the example values provided, to match local certificate requirements and delete those that are not applicable.</p> <p>The user can add up to 20 different SANs. If an incorrect SAN type is entered, an error message, Unsupported SAN type, is displayed when the Send Details button is clicked.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• The SAN field, DNS Name (FQDN) is not used for Machine Account validation. For example, when using a DMA, the DMA will not validate the RMX unless the FQDN field in the User Properties (New User) dialog box is correctly filled in.</li> <li>• The SAN field should not be used when configuring the RMX for use in MS Lync Environments.</li> </ul>
<i>Hash Method</i>	<p>Select <b>SHA-256</b> (in compliance with <i>UC APL, FIPS 140-2</i>).</p> <p><b>Note:</b> For backward compatibility, with previous versions, <i>SHA-1</i> is selectable as the hash algorithm used in the creation of CSRs (Certificate Signing Requests).</p>

**8** Click **Send Details**.

The *RMX* creates a *New Certificate Request* and returns it to the *Create Certificate Request* dialog box along with the information the user submitted.

Country Name (2 letter code)

State or Province (full name)

Locality (full name)

Organization (full name)

Organizational Unit (section)

Common Name (DNS)

Subject Alternative Name (SAN)

Principal Name=user@example.com  
 DNS Name=nyhost.example.com  
 DNS Name=nyhost  
 IP Address=x.x.x.x

Hash Method: SHA-1

```
-----BEGIN NEW CERTIFICATE REQUEST-----
MIIBkCB/AIBADBTMsQwCQYDVQQGEWJ1TDZELMakGA1UECBMCNDUxCzAJBgNVBACT
AjIjMyRAwDgYDQkEwdQTOxZQ09NMQswCQYDVQQLLEw1ZDELMAkGA1UEAxMCNDMw
gZ8wDQYJKoZIhvcNAQEBBQADgYDAMIGJAoGBALBshuzaZVgBuXwh/LTICQVZrTG
sHTChQumEBRhl+RQOmvEsaug9k34/DVYajRHHWbmoQBjNlJainVboulcMhQDp
oiZuKBN6nm+5pdv6J/gFN7o43qqWEvhzDuBChnTWa/R923o2738t/Y9p2b+69rrh
efOidxQqBvAps4ajAgMBAAGgADANBgkqhkiG9w0BAQFAA0BpQCwIqzGUabeZOEH
gNl6TBZEcmOs2NlZ1z+U87IEOIMOsKx9wwK3ajdXBjF5Jed0Iz+NI+vr6RGHdf
X5VY8wrm0Fk7126n6VpdeEneIPp9Qms2eWlUzWUf9n075IKzqj7XA0y/nib4
```

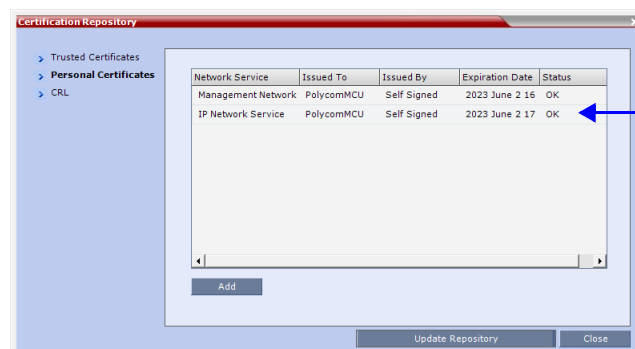
Send Details Copy Request Close

- 9 Click **Copy Request** to copy the *New Certificate Request* to the workstation's clipboard.
- 10 Click **Close**.
- 11 Connect to your preferred *Certificate Authority's* website using the web browser.
- 12 Follow the purchasing instructions at the *Certificate Authority's* website.  
Paste (**Ctrl + V**) the *New Certificate Request* as required by the *Certificate Authority*.

The *Certificate Authority* issues the *TLS/SSL* certificate, and sends the certificate to you by e-mail.

## Installing Certificates for the IP Network Service

- 13 In the *Certification Repository* dialog box, select **IP Network Service**.



- 14 Repeat **steps 4 to 12** above for the *IP Network Service*.

## Installing the Certificates

TLS certificates can be generated using the following methods: CSR, PFX and PEM; each giving different options for *Encryption Key* length. Table 1-18 lists the *SIP TLS Encryption Key* length support for the various system components.

**Table 1-18** SIP TLS - Encryption Key Support by System Component

System Component	Key Generation Method	Key Length (bits)	Key generated by
SIP Signaling	CSR	2048	RMX
	PFX / PEM	1024 or 2048	User
Management	CSR	2048	RMX
LDAP			

The specific security certificate requirements for *Collaboration Servers* used in *Maximum Security Environments* are:

- Support of 2048-bit encryption keys.
- Support of *Extended Key Usage (EKU)* for both:
  - *Client Authentication*
  - *Server Authentication*

The certificate template used by your CA server may need modification to meet the Collaboration Server requirements.

In *Ultra Secure Mode*, each *Polycom* device must have security certificates for the entire *Chain Of Trust*.

The Collaboration Server must have:

- The public certificate of each server in the *CA Chain* or hierarchy that issued its certificate.  
For example: *RootCA* ↔ *IntermediateCA* ↔ *SubCA*

The public certificates of the chain that issued the administrator's identity certificate. For example: *UserRootCA* ↔ *UserIntermediateCA* ↔ *UserSubCA*

### Certificate Expiry

The certificate expiry date is checked daily. An active alarm is raised two weeks before the certificate is due to expire, stating the number of days to expiry.

If the certificate expires, the RMX continues to work in secure mode and an *Active Alarm* is raised with *Security mode failed - Certificate expired* in the description field.



Certificates are deleted when an administrator performs a *Restore Factory Defaults* with the *Comprehensive Restore* option selected.

## Installing the RMX Certificates

After you have received the *Certificates, Trusted (CA) Certificate(s)*, and *CRL* (if needed - *OCSP* is the preferred method for certificate maintenance) from the *Certificate Authority*, continue with the following installation procedures.



**To install the certificate:**

The following Steps 1 - 4 must be executed for both the *Management Network* and the *IP Network Certificates*.

- 1 **Select (Ctrl + A)** and **Copy (Ctrl + C)** the certificate information from the *Certificate Authority's* e-mail to the clipboard.
- 2 In the *RMX* menu, click **Setup > Secured RMX Communications > Send Certificate**.
- 3 Click **Paste Certificate** to paste the clipboard content into the *Send Certificate* dialog box.



- 4 Click the **Send Certificate** button to send the certificate to the *RMX*.  
The *RMX* validates the certificate.
  - If the certificate is not valid, an error message is displayed.
  - If the certificate matches the private key, and the task is completed, a confirmation message indicating that the certificate was created successfully is displayed.
 A *System Restart* is **not** required at this point.



Steps 1 - 4 above must have been executed for both the *Management Network* and the *IP Network Certificates* before **closing** and **updating** the repository.

- 5 Click **Close**
- 6 Click **Update Repository**.
- 7 Re-boot the *MCU*.

**Installing the Trusted Certificate(s)****To add a Trusted Certificate to the repository:**

This procedure is performed for each *CA Certificate* that is to be added to the *Certification Repository*.

Two options are available for sending the certificate to the *RMX*:

- **Paste Certificate and Send Certificate**  
Use this option if the certificate has been received from the *Certification Authority* in text format.

- **Send Certificate File**

Use this option if the certificate has been received from the Certification Authority in file format.

**Option. Paste Certificate and Send Certificate**

After you have received the certificate from the *Certificate Authority*:

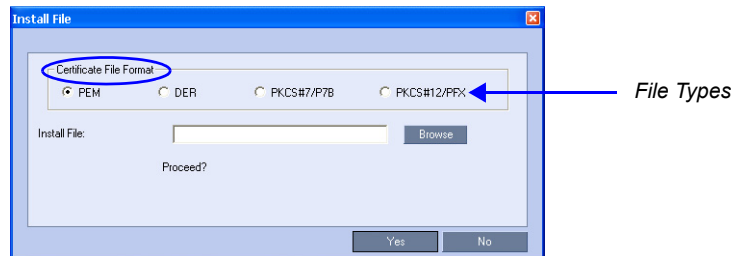
- 1 **Copy (Ctrl + C)** the certificate information from the *Certificate Authority's* e-mail to the clipboard.
- 2 Click **Paste Certificate** to paste the clipboard content into the *Send Certificate* dialog box.
- 3 Click the **Send Certificate** button to send the certificate to the RMX.

**Option. Send Certificate File**

After you have received the certificate file from the *Certificate Authority*:

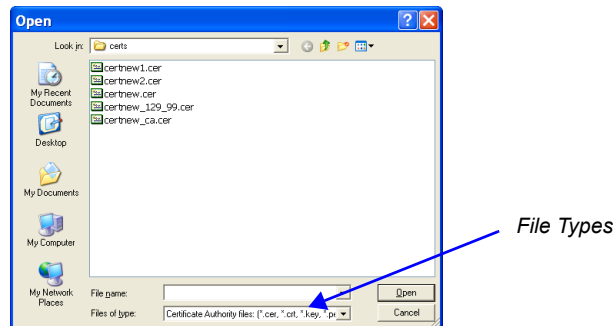
- 1 Click **Send Certificate File**.

The *Install File* dialog box is displayed.



- 2 Select the *Certificate File Format*: PEM, DER, PKCS#7/P7B or PKCS#12/PFX.
- 3 Enter the certificate file name in the *Install File* field or click the **Browse** button.

The *Open* file dialog box is displayed. The files are filtered according to the *Certificate File Format* selected in **Step 2**.



- 4 Enter the certificate file name in the *File name* field or click to select the certificate file entry in the list.
- 5 Click the **Open** button.
- 6 In the *Install File* dialog box, click the **Yes** button to proceed.

The certificate is added to the *Trusted Certificate List* in the *Certification Repository*.

- 7 **Optional.** If there are additional *Trusted Certificates* to be added to the *Certification Repository*, repeat the above procedure.

## Installing the CRLs



Use this procedure if *CRL* is the chosen method and *OCSP* is not to be used:

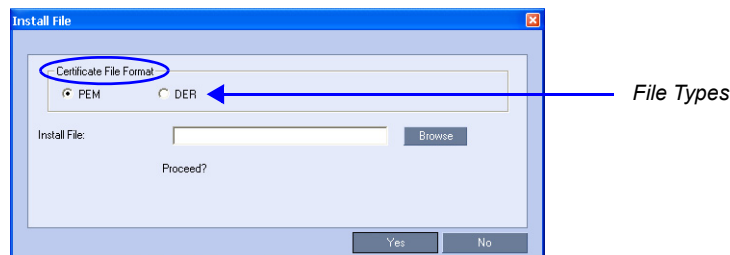
*CRL* - Requires at least one *CRL* file be installed, failing which an error message, *At least one CRL should be installed*, is displayed.

This procedure is performed for each *CRL* that is to be added to the *Certification Repository*.

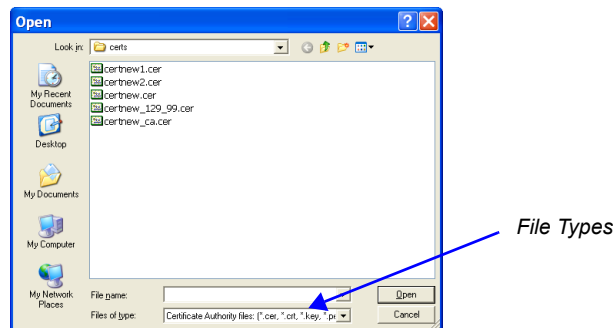
### To add a *CRL* to the repository:

Repeat steps 1 - 7 for each *CRL* that is to be added to the *Certification Repository*.

- 1 In the *CRL List* tab, click the **Add** button.
- 2 The *Install File* dialog box is displayed.



- 3 Select the *Certificate File Format*: *PEM* or *DER*.
- 4 Enter the certificate file name in the *Install File* field or click the **Browse** button.
- 5 The *Open* file dialog box is displayed. The files are filtered according to the file type selected in **Step 2**.



- 6 Enter the *Certificate* file name in the *File name* field or click to select the certificate file entry in the list.
- 7 Click the **Open** button.

The certificate is added to the *CRL List* in the *Certification Repository*.

- 8 **Optional.** If there are additional *Trusted Certificates* to be added to the *Certification Repository*, repeat the above procedure.

When the **Update Repository** button is clicked, all added *Trusted Certificates* and *CRLs* are installed and the *RMX* displays an *RMX Manager* connection termination confirmation dialog box.

- 9 Click the **OK** button.
- 10 Login to the *RMX* to proceed with further management tasks.

## Certificate Revocation

*Certificate Revocation* of *IP Network* and peer *SIP TLS* certificates for each defined *IP Service* can be enabled, disabled and configured. *OCSP* and *CRL* are the two *Certificate Revocation* methods available. **OCSP is the preferred method.**

### To configure Certificate Revocation:

- 1 In the *Revocation Method* drop down menu select **OCSP**.

*OCSP* is the preferred method, and when selected, additional configuration options are displayed.

The screenshot shows the 'IP Network Service Properties' dialog box. The 'Revocation Method' is set to 'OCSP'. The 'Global Responder URL' field is empty. The 'SIP Servers' table shows a Primary Server at 10.99.3.30 on port 5061. The 'Outbound Proxy Servers' table shows a Primary Server at 10.99.3.30 on port 5061.

Parameter	Primary Server	Alternate Server
Server IP Addr	10.99.3.30	
Server Domain	UC	
Port	5061	

Parameter	Primary Server
Server IP Addr	10.99.3.30
Port	5061

- 2 In the *Global Responder URL* field, type the *URL* of the *Global Responder* to be used. The format of the *URL* is validated and must be of the format: `http(s)://responder.example.com/ocsp`. The *URL* can be either *http* or *https*. If the *Global Responder URL* does not respond an *Active Alarm* is raised.

- 3 **Optional.** Clear the *Use Responder Specified in Certificate* check box.

**Optional.** If it is required that the *Responder URL* is taken from the *Authority Information Access (AIA)* element of the *Certificate*, select the *Use Responder Specified in Certificate* check box. If the certificate does not contain a *Responder URL*, the *Global Responder URL* will be used.

- 4 Clear the *Allow Incomplete Revocation Checks* check box to ensure that all checks are performed.

If the check box is and left unchecked and the *Global Responder* or the *Responder Specified in the Certificate* do not respond correctly, the certificate is considered revoked and system lock-out is possible. It is therefore important that the user *pings* the *Global Responder* or the *Responder Specified in the Certificate* to verify correct operation.

If the check box is checked and the *Global Responder* or the *Responder Specified in the Certificate* does not respond for any reason the certificate is not considered revoked.

**System Flag:**

Network latency or slow WAN links can cause login problems when logging in to the *RMX's Management Network*. The **OCSP\_RESPONDER\_TIMEOUT** *System Flag* can be added, and its value set to the number of seconds the *MCU* is to wait for an *OCSP* response from the *OCSP Responder* before failing the connection.

Default: 3 (seconds)

Range: 1-20 (seconds)

## Switching to Secure Communication Mode

After the *SSL/TLS* certificate is installed, secure communications are enabled by modifying the properties of the *Management Network* in the *Management Network* properties dialog box.

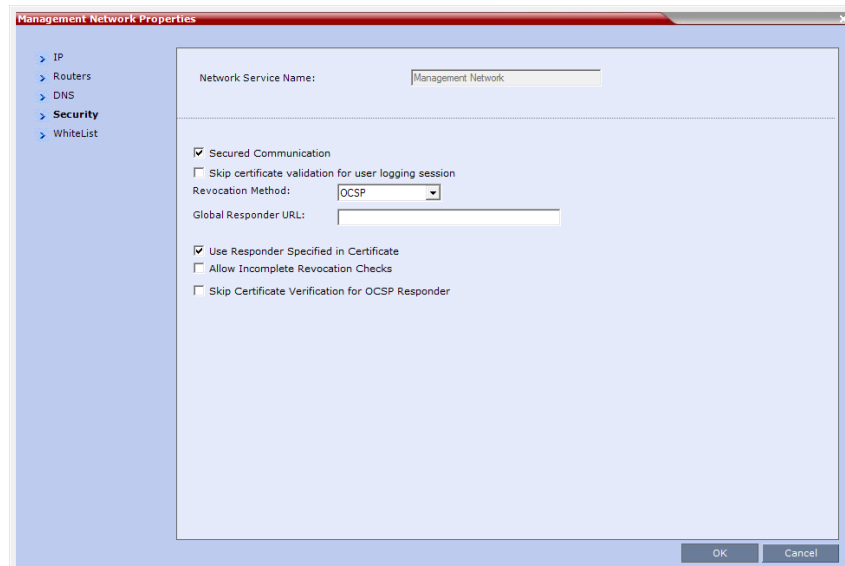
When *Secure Communications Mode* is enabled:

- Only **https://** commands from the browser or *RMX Manager* to the *Control Unit IP Address* of the *RMX* are accepted.
- The *RMX* listens only on secured port 443.
- All connection attempts on port 80 are rejected.
- A secure communication indicator (🔒) is displayed in the browser's status bar.

**To enable secure communications mode:**

- 1 In the *RMX Management* pane, click **IP Network Services**.
- 2 In the *IP Network Services* list pane, double click the **Management Network** entry.
- 3 Click the *Security* tab.

The *Security* tab dialog box is displayed.



- 4 Configure **Secured Communication**:
  - a Select the **Secured Communication** check box.
  - b Un-Check the **Skip certificate validation for user logging session** check box.
  - c Select the *Revocation Method* - **OCSP** is preferred.
  - d In the *Global Responder URL* field, add a **Global Responder URL** if needed.

- e Select the **Use Responder Specified in Certificate** check box.
  - f Un check the **Allow Incomplete Revocation Checks** check box.
  - g Un check the **Skip Certificate Verification of OCSP Responder** check box.
- 5 Click **OK**.
  - 6 In the *Reset Confirmation* dialog box, click **Yes**.
  - 7 In the *Please wait for system reset* message box, click **OK**.



System restart may take up to five minutes.

- 8 In the *RMX Manager's MCUs* list, periodically highlight the *RMX* and then select **Connect MCU**. When the system has restarted and is back online the *Login Banner* will be displayed and you will be able to logon.

## Procedure 7: Optional. Configure SIP/AS-SIP for the Signaling Network

Once all certificate configuration has been completed, the *SIP/AS-SIP IP Network Service* can be configured (if needed).

If *SIP* is not being used, skip to "*Procedure 8: Set System Configuration Flags*".

### To Configure AS-SIP for the Signaling Network:

- 1 In the *RMX Management* pane, click the **IP Network Services** button.
- 2 In the *IP Network Services* list pane, double-click **IP Network Service**.

When the *IP Network Service Properties* dialog box opens, click the **SIP Servers** tab.

The screenshot shows the 'IP Network Service Properties' dialog box. The left-hand navigation pane has 'SIP Servers' selected and circled in blue. The main configuration area is as follows:

- Network Service Name: IP Network Service
- IP Network Type: H.323 & SIP
- SIP Server: Specify
- SIP Server Type: Generic
- Refresh Registration every: 3600 seconds
- Transport Type: TLS
- Skip certificate validation
  - Revocation Method: OCSP
  - Global Responder URL: (empty field)
  - Use Responder Specified in Certificate
  - Allow Incomplete Revocation Checks
  - Skip Certificate Verification for OCSP Responder

Below the main configuration are two tables:

**SIP Servers:**

Parameter	Primary Server	Alternate Server
Server IP Addr	10.99.3.30	
Server Domain	UC	
Port	5061	

**Outbound Proxy Servers:**

Parameter	Primary Server
Server IP Addr	10.99.3.30
Port	5061

- 3 Modify the following fields for *UC APL* compliance:

**Table 1-19** IP Network Service - SIP Servers: AS-SIP

Field	Required Setting
<i>IP Network Type</i>	Select <b>H323 &amp; SIP</b> .
<i>SIP Server</i>	Select <b>Specify</b> . <b>Note:</b> The IP address fields are enabled only if <b>Specify</b> is selected.
<i>SIP Server Type</i>	Select <b>Generic</b> .
<i>Refresh Registration Every</i>	Enter <b>3600</b> . <b>Note:</b> This value may be varied to accommodate specific environment requirements.
<i>Transport Type</i>	Select <b>TLS</b> .
<i>Skip Certificate Validation</i>	Unchecked.
<i>Revocation Method</i>	Select <b>OCSP</b> .

**Table 1-19** IP Network Service - SIP Servers: AS-SIP (Continued)

Field	Required Setting
<i>Global Responder URL</i>	Enter the <i>URL</i> of an <i>OCSP Responder</i> that can be used in cases where a certificate does not have an <i>OCSP Responder URL</i> specified in the <i>AIA</i> field of the certificate. <b>Note:</b> This can be true especially of root <i>CA</i> certificates. If you know that all certificates that will be received or processed by the <i>RMX</i> system will contain a valid <i>AIA</i> field with the <i>URL</i> of an active <i>OCSP</i> responder, then this field can be left blank.
<i>Use Responder Specified in Certificate</i>	Selected.
<i>Allow Incomplete Revocation Checks</i>	This field should be left unchecked unless it is acceptable per site policies to allow revocation checking to be skipped for a certificate if an <i>OCSP</i> responder is contacted and for some reason is unreachable (and so does not respond). <b>Note:</b> The <i>RMX</i> system will always attempt to perform the revocation check by contacting the <i>OCSP</i> responder, therefore, enabling this setting allows it consider no response from the responder as a successful check.
<i>Skip Certificate Validation for OCSP Responder</i>	Unchecked.
<b>SIP Servers</b>	
<i>Server IP Address or Name</i>	Enter either the <i>IP</i> address or the host name of the preferred <i>SIP</i> server (use the host name if the server is registered with the <i>DNS</i> ).
<i>Server Domain Name</i>	Enter the name of the <i>SIP / AS-SIP</i> domain that the server administers (this domain may be different from the <i>DNS</i> domain assigned to the <i>RMX</i> system).
<i>Port</i>	<i>SIP - TLS</i> requires a setting of <b>5061</b> .
<b>Outbound Proxy Servers</b>	
<i>Server IP Address</i>	The <i>Outbound Proxy Server IP Address</i> must be same as that of the <i>SIP Server</i> .
<i>Port</i>	<i>SIP - TLS</i> requires a setting of <b>5061</b> .

- 4 Click **OK**.



## Procedure 8: Set System Configuration Flags

*Maximum Security Environments* have additional *System Flags* that control:

- *Network Security*
- *User Management*
- *Strong Passwords*
- *Login and Session Management*
- *Cyclic File Systems*

When the *Maximum Security Environment* is enabled by adding the **ULTRA\_SECURE\_MODE** *System Flag* and setting its value to **YES** using the **Setup > System Configuration** menu, **YES**, the enhanced security features are enforced.

Table 1-20 lists the default and recommended values of these flags in *Ultra Secure Mode*.

**Table 1-20** System Flags and their default values

Flag	Description	Recommended Value
ALLOW_NON-ENCRYPT_PARTY_IN_ENCRYPT_CONF	If YES, allows non-encrypted participants to connect to encrypted conferences. Default: No	NO
ALWAYS_FORWARD_DTMF_IN_GW_SESSION_TO_ISDN	Enables the forwarding of all <i>DTMF</i> codes sent by participants in a <i>Gateway Session</i> to all <i>PSTN</i> and <i>ISDN</i> participants. <b>Note:</b> This <i>System Flag</i> must be added using the <i>Setup &gt; System Configuration</i> menu.	YES
ANAT_IP_PROTOCOL	When the <i>RMX</i> is configured for <i>IPv4</i> and <i>IPv6</i> addressing, the addition of the <i>sdp-anat</i> option tag in the <i>SIP Require</i> and <i>SIP Supported</i> headers allows a mixture of <i>IPv4</i> and <i>IPv6</i> addressing to be specified by the <i>Session Description Protocol (SDP)</i> . For a full description of <i>ANAT</i> see <i>IETF RFCs 4091</i> and <i>4092</i> and the <i>RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide, "Alternative Network Address Types (ANAT)"</i> . Default: Auto (In <i>Ultra Secure Mode</i> ) Possible Values: DISABLED, AUTO, PREFER_IPv4, PREFER_IPv6	AUTO
DISABLE_INACTIVE_USER	Determines the number of consecutive days a user can be inactive before being disabled. Default: 30 Range: 1-90	30
ENABLE_CYCLIC_FILE_SYSTEM_ALARMS	When set to YES an Active Alarm is created when a Cyclic File (Log, CDR, Audit) reaches a file retention time or file storage capacity limit. Default: YES	YES

**Table 1-20** System Flags and their default values (Continued)

Flag	Description	Recommended Value
<i>FORCE_STRONG_PASSWORD_POLICY</i>	Enables or disables all password related flags. This flag cannot be set to NO when the RMX is in <i>Ultra Secure Mode</i> . Default: YES	YES
<i>HIDE_CONFERENCE_PASSWORD</i>	When set to YES, Conference and Chairman passwords are replaced by asterisks in the RMX Web Client, <i>RMX Manager</i> , Audit Event and Log files. Default: YES	YES
<i>LAST_LOGIN_ATTEMPTS</i>	When set to YES, the system displays a record of the last Login of the user in the Main Screen of the RMX Web Client or <i>RMX Manager</i> . Default: YES	YES
<i>MAX_KEEP_ALIVE_REQUESTS</i>	The number of <i>KeepAliveTimeout</i> request intervals for the <i>Apache</i> server. In a <i>Maximum Security Environment</i> this value must be set to a value of <b>1814400</b> to ensure that the <i>RMX Web Client / RMX Manager</i> will remain connected for several hours, but not indefinitely. The exact time period depends on the type of client that is connected and the number of requests. Default: 0 (This value should <b>never</b> be used as the connection time is unlimited.) (If the <i>SESSION_TIMEOUT_IN_MINUTES System Flag</i> if configured, the <i>RMX Web Client / RMX Manager</i> will disconnect after the specified period if there is no keyboard or mouse activity.)	1814400
<i>MAX_NUMBER_OF_MANAGEMENT_SESSIONS_PER_SYSTEM</i>	Determines the maximum number of management sessions per system. Default: 80 Range: 4-80	80
<i>MAX_NUMBER_OF_MANAGEMENT_SESSIONS_PER_USER</i>	Determines the maximum number of management sessions per user. Default: 20 Range: 4-80	10
<i>MIN_PASSWORD_LENGTH</i>	Determines the minimum length of a user password. Default: 15 Range: 15-20	15
<i>MIN_PWD_CHANGE_FREQUENCY_IN_DAYS</i>	Determines the minimum number of days that users must retain passwords. Default: 1 Range: 1-7	1

**Table 1-20** System Flags and their default values (Continued)

Flag	Description	Recommended Value
<i>NUMERIC_CHAIR_PASS_MIN_LEN</i>	Determines the minimum length of a user chairperson password. Default: 9 Range: 9-16	9
<i>NUMERIC_CONF_PASS_MIN_LEN</i>	Determines the minimum length of a conference password. Default: 9 Range: 9-16	9
<i>OCSP_RESPONDER_TIMEOUT</i>	The number of seconds the RMX is to wait for an OCSP response from the OCSP Responder before failing the connection. connection. Network latency or slow WAN links can cause login problems when logging in to the RMX's Management Network. This System Flag's value determines the number of seconds the MCU is to wait for an OCSP response from the OCSP Responder before failing the connection. Default: 3 (seconds) Range: 1-20 (seconds)	3
<i>PASSWORD_EXPIRATION_DAYS</i>	Determines the number of days that passwords remain valid. Default: 60 Range: 7-90	60
<i>PASSWORD_EXPIRATION_WARNING_DAYS</i>	Determines how many days before password expiration a warning of pending password expiration will be displayed to the users. Default: 7 Range: 7-14	7
<i>PASSWORD_HISTORY_SIZE</i>	Determines how many previous passwords are recorded to prevent users from re-using previous passwords. The list is cyclic, with the most recently recorded password causing the deletion of the oldest recorded password. Default: 10 Range: 10-16	10
<i>QOS_IP_AUDIO</i>	The default priority for audio packets.	0xb8 *
<i>QOS_IP_SIGNALING</i>	The default priority for Signaling Network packets.	0xA0 *
<i>QOS_IP_VIDEO</i>	The default priority for video packets.	0x68 *
<i>QOS_MANAGEMENT_NETWORK</i>	The default priority for Management Network packets.	0x10 *

**Table 1-20** System Flags and their default values (Continued)

Flag	Description	Recommended Value
<i>REDUCE_CAPS_FOR_REDCOM_SIP</i>	To accommodate deployments where some devices have limits on the size of the <i>SDP</i> payload in <i>SIP</i> messages (such as <i>LSCs</i> from <i>Redcom</i> running older software versions), when the flag value = YES the <i>SDP</i> size is less than 2kb and includes only one audio and one video media line. Default: NO Range: YES, NO	NO
<i>SEND_SRTP_MKI</i>	Enables or disables the inclusion of the <i>MKI</i> field in <i>SRTP</i> packets sent by the RMX. Setting the value to NO to disables the inclusion of the <i>MKI</i> field in <i>SRTP</i> packets sent by the RMX. Set this flag to: <ul style="list-style-type: none"> <li>• <b>NO</b> <ul style="list-style-type: none"> <li>• When all conferences on the <i>RMX</i> will not have <i>MS-Lync</i> clients participating and will have 3rd party endpoints participating.</li> <li>• When using endpoints (eg. <i>CounterPath Bria 3.2 Softphone</i>) that cannot decrypt <i>SRTP</i>-based audio and video streams if the <i>MKI</i> (<i>Master Key Identifier</i>) field is included in <i>SRTP</i> packets sent by the RMX.</li> </ul> </li> <li>• <b>YES</b> <ul style="list-style-type: none"> <li>• When any conferences on the <i>RMX</i> will have both <i>MS-Lync</i> clients and <i>Polycom</i> endpoints participating.</li> <li>• Some 3rd party endpoints may be unsuccessful in participating in conferences with this setting.</li> </ul> </li> </ul> <b>Notes:</b> <ul style="list-style-type: none"> <li>• This <i>System Flag</i> must be added and set to YES (default) when <i>Microsoft Office Communicator</i> and <i>Lync Clients</i> are used as they all support <i>SRTP</i> with <i>MKI</i>.</li> <li>• The system flag must be added and set to NO when Siemens phones (<i>Openstage</i> and <i>ODC WE</i>) are used in the environment as they do not support <i>SRTP</i> with <i>MKI</i>.</li> <li>• <i>Polycom</i> endpoints function normally regardless of the setting of this flag.</li> </ul> Default: <b>YES</b>	NO
<i>SESSION_TIMEOUT_IN_MINUTES</i>	The number of minutes after which, if there is no input from the user, the user's connection to the RMX is terminated. Default: 10 Range: 1-999	10

**Table 1-20** System Flags and their default values (Continued)

Flag	Description	Recommended Value
<i>SIP_FORMAT_GW_HEADERS_FOR_REDCOM</i>	Controls whether the <i>RMX</i> adds special gateway prefix and postfix characters to the user portion of the <i>SIP URI</i> expressed in the “ <i>From</i> ” and “ <i>Contact</i> ” headers of <i>SIP</i> messages sent during calls involving <i>Gateway Services</i> . The addition of these characters can result in call failures with some <i>SIP</i> call servers. It is recommended to set this flag to YES whenever the <i>RMX</i> is deployed such that it registers its conferences to a <i>SIP</i> call server. Range: YES, NO Default: NO	YES
<i>SIP_TCP_TLS_TIMERS</i>  (Module: CS)	Determines the timeout characteristics of <i>SIP TCP TLS</i> connections. Format: <i>SIP_TCP_TLS_TIMERS</i> = <string> The string contains the following parameters: Ct - Timeout of <i>TCP CONNECT</i> operation (seconds) Cs - Timeout of <i>TLS CONNECT</i> operation (seconds) A - Timeout of <i>accept</i> operation (seconds) D - Timeout of <i>disconnect</i> operation (nanoseconds) H - Timeout of <i>handshake</i> operation (seconds) Default: <1,5, 4,500000,5>	1,5,4,500000,5
<i>SRTP_SRTCP_HMAC_SHA_LENGTH</i>	Controls the <i>Privacy Protocol</i> when using <i>Media Encryption and Authentication</i> . For more information see the <i>RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator’s Guide, “Media Encryption and Authentication”</i> . Range: 80, 32, 80_32 Default: 80	80_32
<i>USER_LOCKOUT</i>	When this flag is set to YES, a user is locked out of the system after three consecutive Login failures with same User Name. The user is disabled and only the administrator can enable the user within the system. Default: YES	YES
<i>USER_LOCKOUT_DURATION_IN_MINUTES</i>	Determines the time period during which three consecutive Login failures occur that will result in the user being locked out. Default: 0 Range: 0-480	0
<i>USER_LOCKOUT_WINDOW_IN_MINUTES</i>	Determines the time period for which the user is locked out. Default: 60 Range: 0-45000	60

\* The relationship between the hexadecimal settings of the of the *QoS System flags* and the *DSCP* values is detailed in "Procedure 10: Configure Precedence (DSCP) and QOS" on page 1-80.

## Modifying Flag Values

System security can be further strengthened by modifying the default flag values. These modified values are applied to the system when the **ULTRA\_SECURE\_MODE** *System Flag* is set to **YES**.

### To modify the system configuration flags:

- 1 On the *RMX* menu, click **Setup > System Configuration**.  
The *System Flags* dialog box is displayed.
- 2 Locate and double-click on the *System Flag* to be modified.  
The *Update Flag Name* dialog box is displayed.
- 3 In the *New Value* field, enter the value required for the flag.
- 4 Click the **OK** button to close the *Update Flag Name* dialog box.
- 5 Repeat steps 2 to 4 for each flag value to be modified.
- 6 Click the **OK** button to close the *System Flags* dialog box.
- 7 In the *Reset Confirmation* dialog box, click **Yes**.
- 8 In the *Please wait for system reset* message box, click **OK**.



System restart may take up to five minutes.

- 9 In the *RMX Manager's MCUs* list, periodically highlight the *RMX* and then select **Connect MCU**. When the system has restarted and is back online the *Login Banner* will be displayed and you will be able to logon.
- 10 Connect to the *RMX*. See "Connecting to the *RMX*" on page 1-55.

## Procedure 9: Optional. Configure 802.1X Authentication



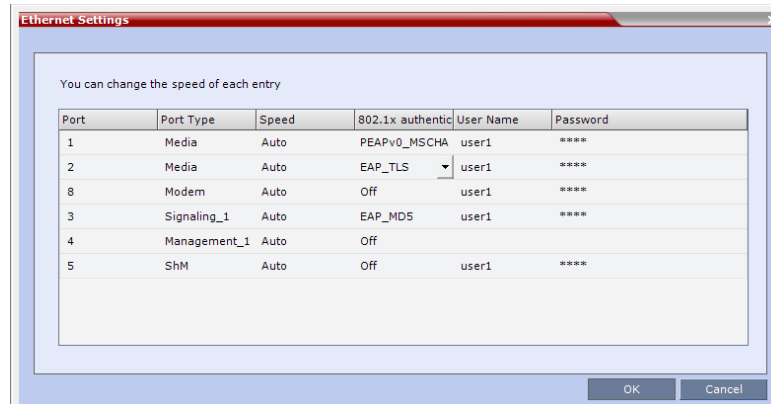
- Perform this procedure if required within the environment.
- If 802.1X is being used on the production network, then it is possible that previous steps may have failed due to the *RMX* not being on the production network yet (and thus being unable to reach remote servers). After completing this step any such failures should not reoccur.

802.1X Authentication must be enabled for each *Network Interface Controller (NIC)*.

### To enable 802.1X Authentication:

- 1 In the *RMX* Menu, click **Setup > Ethernet Settings**

The *Ethernet Settings* dialog box is displayed.



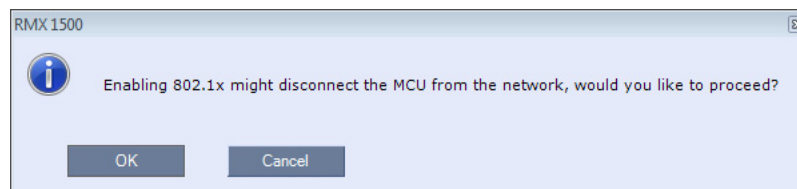
- For each *NIC*, modify the *Ethernet Settings* table fields as set out in **Table 1-21**.

**Table 1-21** 802.1X Authentication - Configuration

Field	Description
<i>802.1X Authentication</i>	For each <i>NIC</i> , click the arrow to open the drop-down menu and select the <i>802.1X Authentication</i> method: <ul style="list-style-type: none"> <li>EAP-TLS</li> <li>PEAPv0</li> </ul> <p><b>Note:</b> EAP-MD5 and MSCHAPv2 are also available as options. Selecting <i>Off</i> disables <i>802.1X Authentication</i>.</p>
<i>User</i>	Enter the <i>User</i> name that the RMX will use to register with the <i>802.1X Authentication Server</i> . This must be the RMX's <i>DNS</i> name and can be up to 256 characters. If the <i>Domain Name (DC)</i> field was completed in the <i>Certificate Request</i> , the <i>User</i> must be: <Common Name (DNS)>@<Domain Name (DC)> as set out in the <i>Certificate Request</i> .
<i>Password</i> (EAP-MD5, PEAPv0 and MSCHAPv2 only)	Enter the <i>Password</i> , that the RMX will use to register with the <i>802.1X Authentication Server</i> . Up to 256 Unicode characters can be used. The <i>Password</i> is always displayed as four asterisks.

- When *802.1X Authentication* is configured for all *NICs*, click **OK**.

A warning message is displayed:



- Click **OK**.  
The RMX is disconnected from the network.
- Disconnect the RMX's *LAN* cables from the existing network and re-connect them to the *802.1X Authentication*-enabled network.

- 6 Login to the RMX from the *802.1X Authentication*-enabled network.

## Procedure 10: Configure Precedence (DSCP) and QOS

*Precedence* is disabled by default and **must** be enabled and configured for *AS-SIP* deployments.

When enabling *Precedence* the *Signaling DSCP* value is considered as part of the full *Diffserv Field*. Its value of **40** relates to the hexadecimal value **0xA0** entered for the **QOS\_IP\_SIGNALING System Flag** value configured in "Procedure 8: Set System Configuration Flags" on page 1-73, as follows:

**Table 1-22** Signaling DSCP Value - Decimal to Hexadecimal Conversion

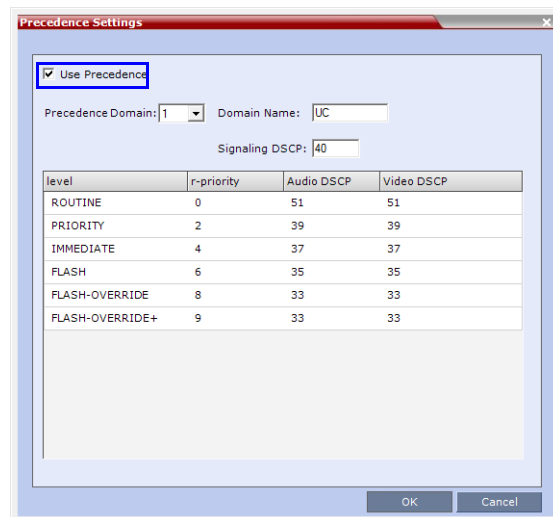
Signaling DSCP Value	DSCP Signaling Value (Standalone)		Diffserv Field	DSCP Signaling Value (As part of Diffserv field)	
	Binary	Hex		Binary	Hex
40	<b>101000</b>	0x28	160	<b>10100000</b>	<b>0xA0 *</b>

\* The **QOS\_IP\_SIGNALING System Flag** value is set as the hexadecimal equivalent of four times the *Signaling DSCP's* decimal value.

### To enable Precedence:

- 1 On the RMX menu, click **Setup > Precedence Settings**.

The *Precedence Settings* dialog box is displayed.



- 2 Select the **Use Precedence** check box.
- 3 In the *Precedence Domain* drop-down menu select **1**.
- 4 In the *Domain Name* field, enter **uc-000000**.
- 5 In the *Signaling DSCP* field enter **40**.



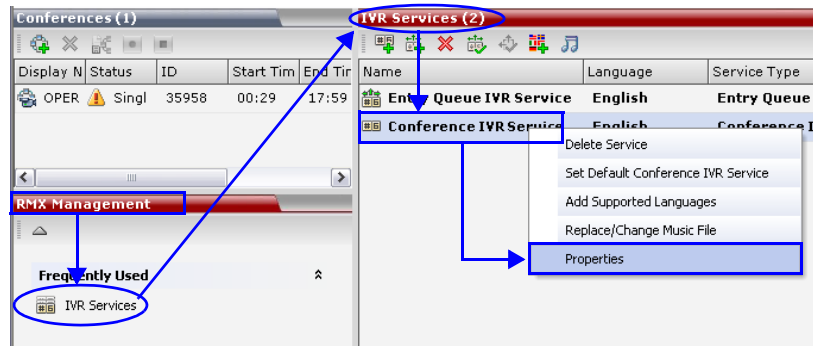
- 6 **Optional.** Using Table 1-22, modify the *Audio DSCP* and *Video DSCP* values for each of the *Precedence Levels* according to local site requirements.
- 7 **Optional.** Modify the *r-priority* values for each of the *Precedence Levels* according to local site requirements.
- 8 In the *Precedence Domain* drop-down menu select **2**.
- 9 In the *Domain Name* field, enter **dsn-000000**.
- 10 In the *Signaling DSCP* field enter **40**.
- 11 **Optional.** Using Table 1-22, modify the *Audio DSCP* and *Video DSCP* values for each of the *Precedence Levels* according to local site requirements.
- 12 **Optional.** Modify the *r-priority* values for each of the *Precedence Levels* according to local site requirements.
- 13 Click **OK**.

## Procedure 11: Configure IVR Settings

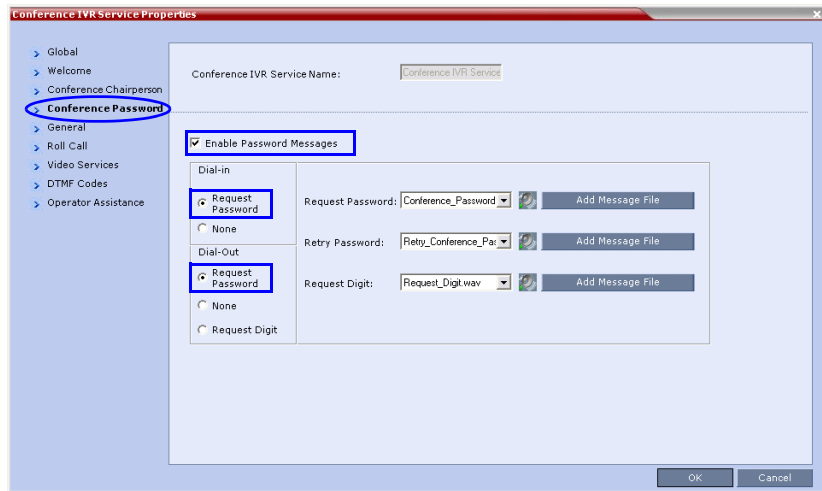


Perform this procedure if a password is to be used to access the conference, otherwise skip.

- 1 In the *RMX Management* pane, click **IVR Services**.  
The *IVR Services* list opens.

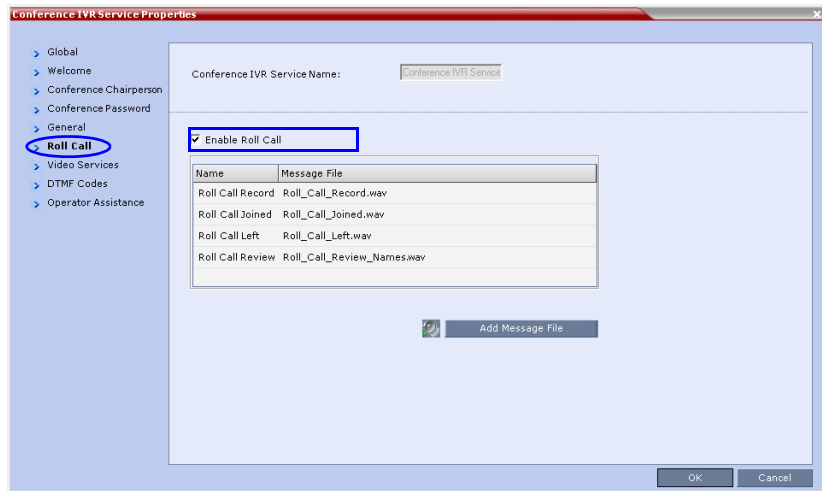


- 2 Right-click the **Conference IVR Service** and select **Properties**
- 3 Click the **Conference Password** tab.  
The *Conference IVR Service Properties - Conference Password* dialog box is displayed.



- 4 Select the **Enable Password** messages.
- 5 Set *Dial-in* to **Request Password**
- 6 Set *Dial-Out* to **Request Password**
- 7 Click the **Roll Call** tab.

The *Conference IVR Service Properties - Roll Call* dialog box is displayed.



- 8 Select **Enable Roll Call**.
- 9 Click the **OK** button.

## Procedure 12: Optional. Modify Default Login and Main Screen Banner Text

The *Login* and *Main Screens* of the *RMX Manager* display warning text banners cautioning users to the terms and conditions under which they may log into and access the system.

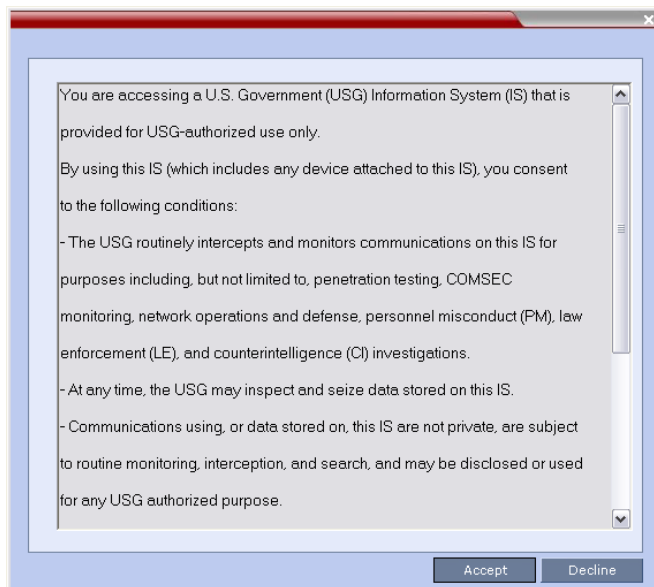
The *Login* and *Main Screen* banners can be enabled when the *RMX* is not in *Ultra Secure Mode* but cannot be disabled when the *RMX* is in *Ultra Secure Mode*.

The **ULTRA\_SECURE\_MODE** *System Flag* affects the display of the *Login* and *Main Screen* banners as follows:

- When set to **YES**, the banners cannot be disabled.
- When set to **NO**, banner display is according to the check box selection in the *Banners Configuration* dialog box.

## Login Screen Banner

The *Login* screen banner displays the terms and conditions for system usage as follows:



The default text is:

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only.

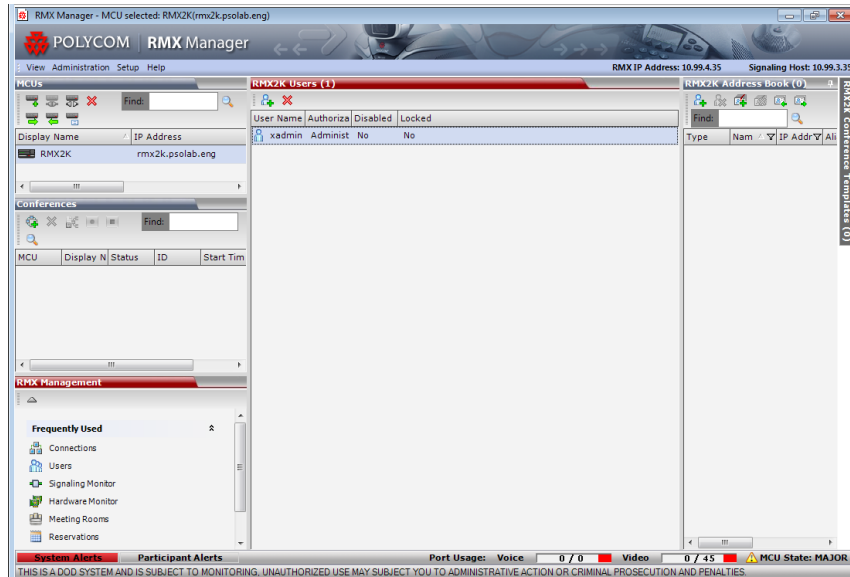
By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

The user must click the **Accept** button before the *Login* screen is displayed.

## Main Screen Banner

The *Main Screen* banner is displayed at the bottom of the screen. It is initially blank and can be customized.



Banner 

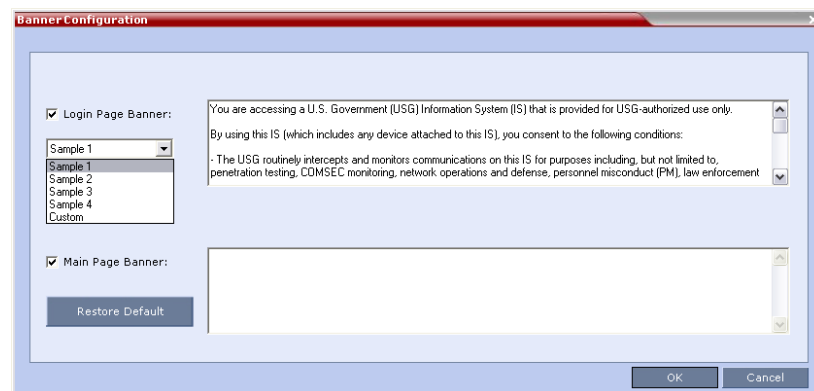
## Customizing Login and Main Screen Banners

The *Login* and *Main Screen* banners can be customized when the RMX is in either *Ultra Secure Mode* or *non-Ultra Secure Mode*.

To customize the banners:

- 1 In the RMX menu, click **Setup > Customize Display Settings > Banners Configuration**.

The *Banners Configuration* dialog box opens.



- 2 Customize the banners by modifying the following fields:

**Table 1-23** Banner Configuration

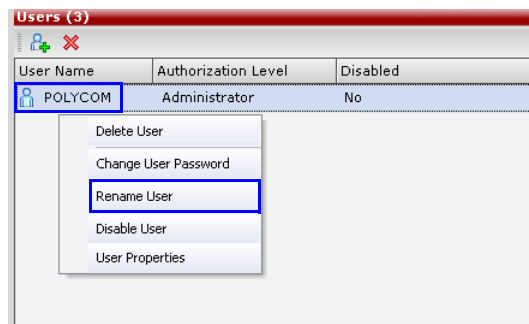
Field	Description		
	Check Box	Text Field	Restore Default Button
<i>Login Page Banner</i>	Select or clear the check box to enable or disable the display of the banner. Banner display cannot be disabled in Ultra Secure Mode.	Edit the text in this field to meet local requirements: <ul style="list-style-type: none"> <li>• Banner content is multilingual and uses Unicode, UTF-8 encoding. All text and special characters can be used.</li> <li>• Maximum banner size is 100KB.</li> <li>• The banner may not be left blank in Ultra Secure Mode.</li> </ul>	Click the button to restore the default text to the banner.
<i>Main Page Banner</i>			

- 3 Click the **OK** button.

## Procedure 13: Rename the Default POLYCOM User

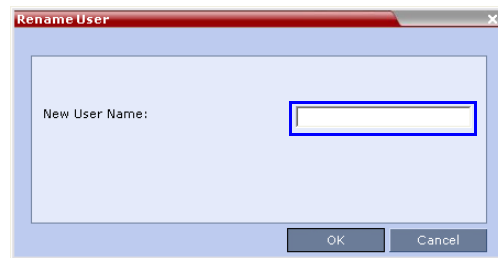
To rename the default POLYCOM user:

- 1 In the *RMX Management* pane, click the **Users** (👤) button.
- 2 The *Users* pane is displayed.
- 3 Select the **POLYCOM** user.



- 4 Select **Rename User** in the menu.

The *Rename User* dialog box is displayed.



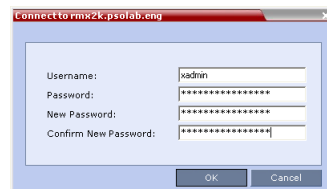
- 5 Enter a new *User Name* in the *New User Name* field and click **OK**.
- 6 Logout of the *RMX*.
- 7 Login, using the new *User Name*.
- 8 Click **Login**.

The *Change Password/Login - Welcome* screen is displayed:

The system will notify you that you must change the password.



- 9 Click **OK**.



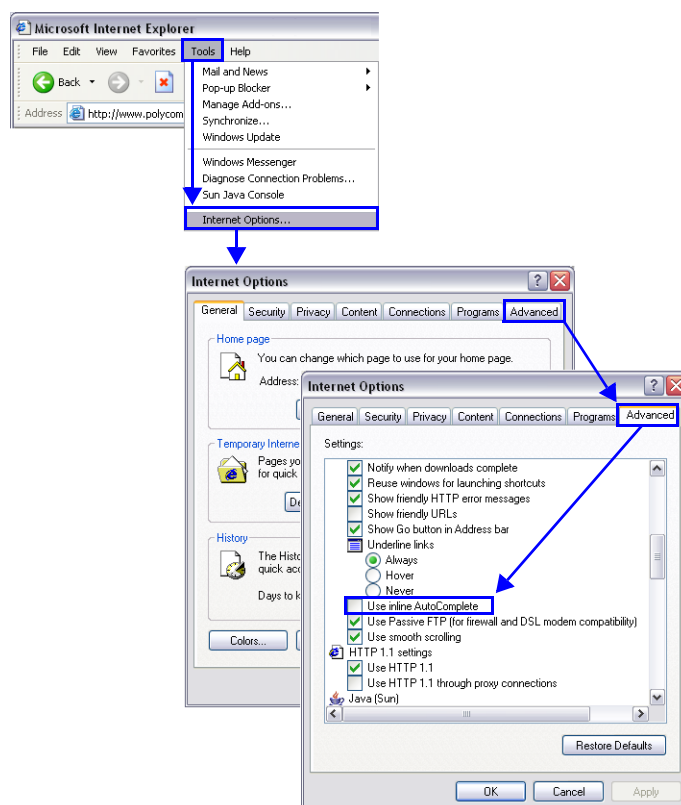
- 10 Enter the new *Username*.
- 11 Enter the old *Password*.
- 12 Enter the *New Password*.
- 13 Confirm the *New Password*.
- 14 Click **OK**.

## Procedure 14: Disable Inline AutoComplete Option in Web Browser

To protect both *User Names* and *Passwords* it is recommended to disable the *Inline AutoComplete* option in the web browser on the workstation.

**To disable the Inline AutoComplete option in Internet Explorer®:**

- 1 In the web browser menu, select **Tools > Internet Options**.
- 2 Select the **Advanced** tab.
- 3 Clear the **Use inline AutoComplete** check box.



- 4 Click the OK button.

## Procedure 15: Configure Whitelist Access

For security reasons it is important that a list of devices permitted to connect to the RMX is configured. The *Whitelist* contains the addresses of all *IP* devices permitted to connect to the RMX.

### To view or modify the Whitelist:

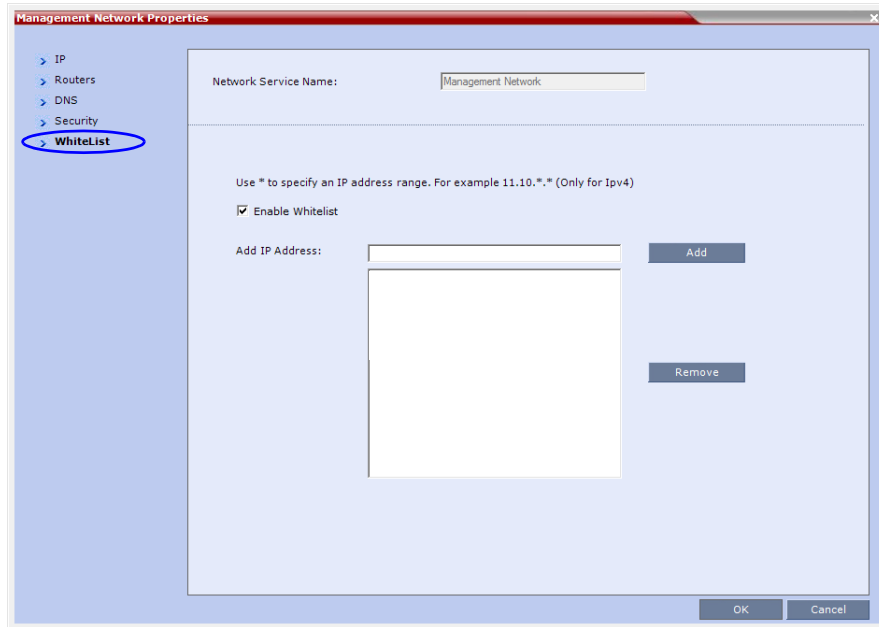
- 1 In the *RMX Management* pane, click the **IP Network Services**.
- 2 In the *IP Network Services* list pane, double-click the **Management Network** entry.
- 3 In the *Management Network Properties* dialog box click the **WhiteList** tab.

The *Whitelist* dialog box is displayed.

- If there are no entries in the *Whitelist*, it is disabled to prevent lock out.
- If the *Whitelist* is disabled none of the *IP* addresses in the list are displayed.
- The *Add* and *Remove* buttons are only active if the *Enable Whitelist* check box is selected.



- 4 Select the **Enable Whitelist** check box.



All IP addresses in the list are displayed and the *Add* and *Remove* buttons become active.

- 5 Modify the *Whitelist*.

Both *IPv4* and *IPv6* addresses are supported and the system will only allow entry of the type of IP addresses for which it is configured according to Table 1-24.

**Table 1-24** IP Address Modes

IP Address Modes	
RMX	Workstation / Device
IPv4	IPv4
	<i>IPv4 &amp; IPv6</i>
IPv6	IPv6
	<i>IPv4 &amp; IPv6</i>
IPv4 & IPv6	IPv4
	IPv6
	<i>IPv4 &amp; IPv6</i>

- If the system changes its IP addressing mode (e.g. from *IPv4* only to both *IPv4 & IPv6*) while the *Whitelist* is enabled, the *Whitelist* is disabled and a message, *Whitelist has been disabled please reconfigure*, is displayed.
- *IPv4* addresses can be added as a range by substituting the 3rd and 4th dotted decimal numbers of the IP address with \* characters, e.g. 11.10.\*.\*

- 6 Add IP addresses to the *Whitelist*:

For each *IP* address to be added to the *Whitelist*:

- a In the *Add IP Address* field enter an *IP* address to be added to the *Whitelist* and click the **Add** button to add the *IP* address to the *Whitelist*.

If an invalid *IP* address is entered, an error message is displayed and the administrator is prompted to enter a correct *IP* address.

- b When all the *IP* addresses have been added, click **OK**.

A message is displayed: *Applying Whitelist will limit RMX web access to the configured IP list, are you sure you want to continue?*

- c Click **Yes** to apply the modified *Whitelist*.

## Procedure 16: Configure Gateway Services

*RMX Gateway Services* provide connectivity between the following protocol combinations:

- PSTN ↔ H.320
- PSTN ↔ H.323
- PSTN ↔ SIP
- PSTN ↔ AS-SIP
- H.320 ↔ H.323
- H.320 ↔ SIP
- H.320 ↔ AS-SIP
- H.323 ↔ SIP
- H.323 ↔ AS-SIP

This connectivity is facilitated by special conference acting as a *Gateway Session*, created on the *RMX*. It includes one dial-in connection of the endpoint initiating the *Gateway Session* and one or several dial-out connections to endpoints.



These *Gateway Services* are internal to the *RMX*, not to be confused with the *V.35 Serial Gateway* capabilities detailed in "*Deploying a Polycom RMX™ Serial Gateway S4GW*" on page **4-1**.

## Configuring the Gateway Components on the RMX

To enable *Gateway Calls* in the *RMX*, the following components have to be configured:

- *Conference IVR Service* to be used with the *Conference Profile* assigned to the *Gateway Profile*. The *IVR Services* are used for *Gateway IVR* connections.
- *Conference Profile* that includes the *IVR Service* for the *Gateway Session* and the settings to automatically terminate the *Gateway Session* when one participant is still connected or when no participants are connected
- *Gateway Profile* for call routing.

For more information see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*, "*Gateway Calls*".

---

# Basic Operation

The *RMX Manager* is the recommended option for accessing the *RMX's* Management Console.



The *RMX Manager* can only be downloaded to the workstation from the link in the *Welcome* screen **before** the *RMX* is placed into *Ultra Secure Mode*. Subsequent downloads of the *RMX Manager*, if necessary, must be obtained from the *Polycom Software Distribution* website.

The most common operations performed via the *RMX Manager* are:

- Starting, monitoring and managing conferences
- Monitoring and managing **participants** and **endpoints** as individuals or **groups**.
  - **Participant** – A person using an endpoint to connect to a conference. When using a *Room System*, several participants use a single endpoint.
  - **Endpoint** – A hardware device, or set of devices, that can call, and be called by an MCU or another endpoint. For example, an endpoint can be a phone, a camera and microphone connected to a PC or an integrated *Room System* (conferencing system).
  - **Group** – A group of participants or endpoints with a common name.

## Starting the RMX Manager

Once installed, the *RMX Manager* is started using the `https://` (secured) command in the browser's address line from the *Windows Start* menu.

**To use the browser:**

- 1 In the browser's command line, enter:  
`https://<MCU Control Unit IP Address>/RMXManager.html`
- 2 Press **Enter**.

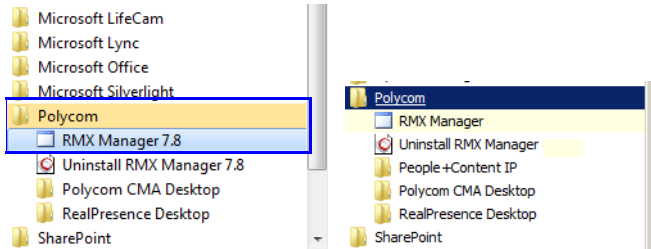
**To use the Windows Start menu:**

- 1 Click **Start > Programs**.

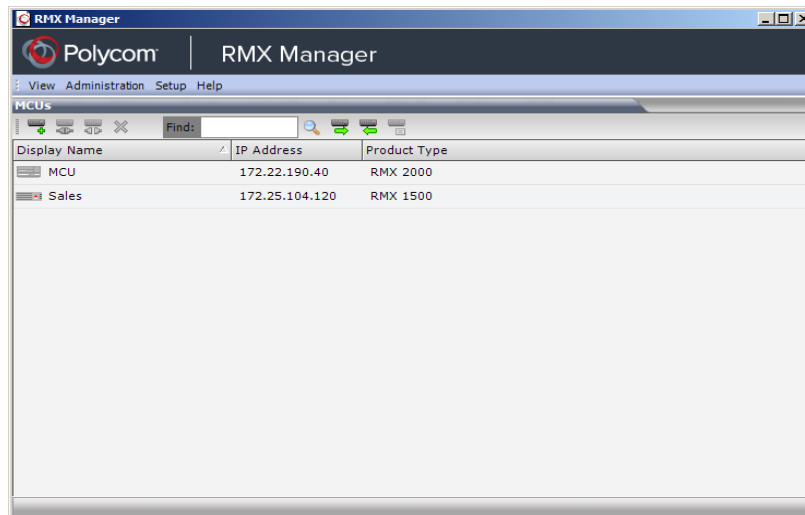
**a** If the *RMX Manager* is displayed in the recently used programs list, click *RMX Manager* in the list to start the application.

OR

**b** Click **All Programs > Polycom > RMX Manager**.



The *MCUs* screen is displayed, listing the MCUs currently defined in the *RMX Manager*.



This screen enables you to add additional MCUs or connect to any of the MCUs listed. For each listed MCU, the system displays the following information:

- *MCU Display Name* (as defined in the Add MCU dialog box).
- *IP Address* of the MCU's control unit
- *Product Type* - The MCU type: RealPresence Collaboration Server (RMX) 1500, RealPresence Collaboration Server (RMX) 2000, or RealPresence Collaboration Server (RMX) 4000.

Before connecting to the MCU for the first time, the *RMX* type is unknown so "RMX" is displayed instead as a general indication.


## Connecting to the MCU

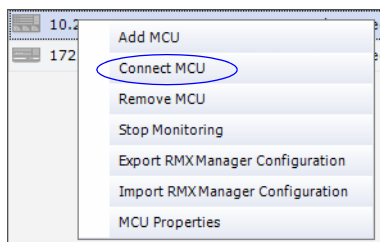
Once an MCU is defined, the *RMX Manager* can be connected to it. This allows you to set up conferences, make reservations, monitor On Going Conferences and perform other activities on several MCUs.



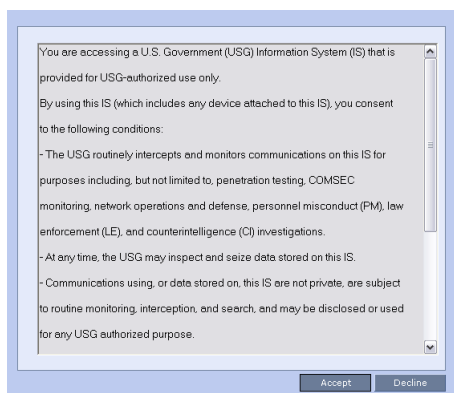
The first *RMX* unit that is connected to the *RMX Manager* dictates the Authorization Level of Users that can connect to the other MCUs on the list. For example, if the Authorization level of the User POLYCOM is Administrator, all Users connecting to the other MCUs on the list must be Administrators. Each user can have a different login name and password for each of the listed MCUs and they must be defined in the Users list of each of the listed MCUs.

### To connect the *RMX Manager* to an MCU:

- 1 In the *MCUs* list, use one of the following methods:
  - a Double-click the MCU icon.
  - b Select the *RMX* to connect and click the **Connect MCU**  button.
  - c Right-click the MCU icon and then click **Connect MCU**.

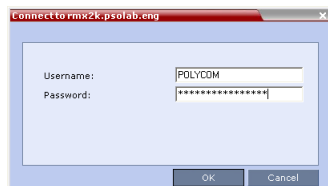


The *DoD* warning banner is displayed.



- 2 Click **Accept**

The *Username / Password* dialog box is displayed.

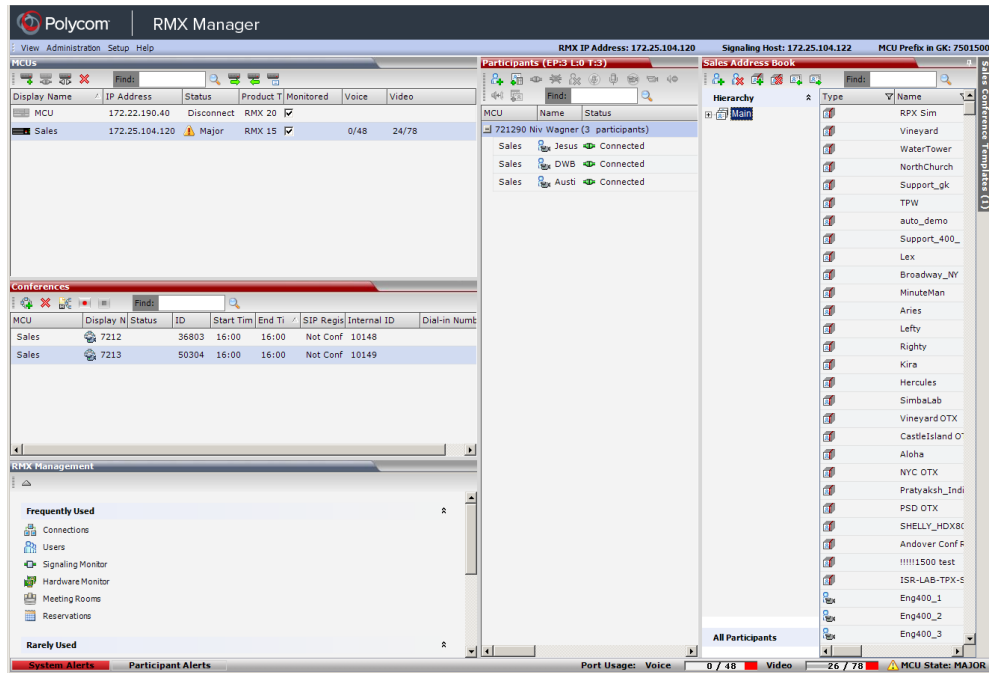


- 3 Enter the *Username* and *Password*.

4 Click OK.

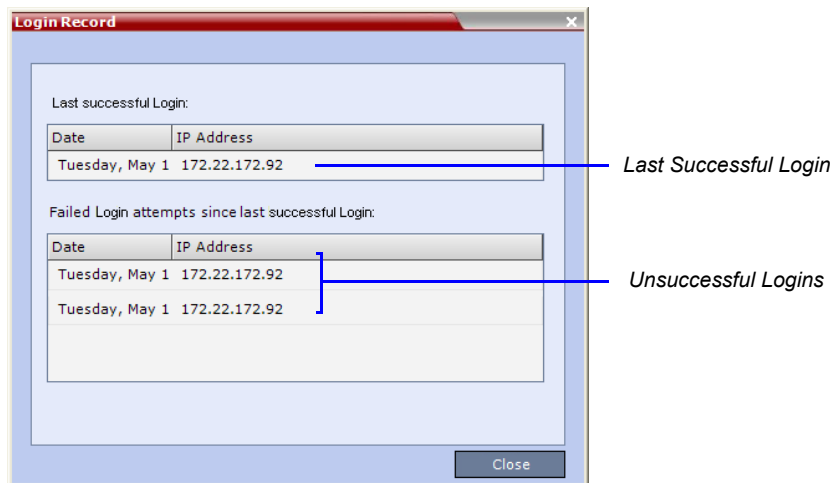
The *RMX Manager - Main Screen* is displayed.

If you are connecting to any MCU from the *MCUs* pane in the *RMX Manager Main Screen* and have defined the *Username* and *Password* for the connecting MCU, the MCU icon changes to connected and its status, type and number of audio and video resources are displayed in the *MCUs* pane.



### Login Record

The system can display a record of the last *Login* of the user. It is displayed in the *Main Screen* of the *RMX Manager*. The user *Login Record* display is enabled when the **LAST\_LOGIN\_ATTEMPTS** System Flag is set to **YES**, which is the default when the **ULTRA\_SECURE\_MODE** System Flag is set to **YES**.



Both lists display the:

- *Date and Time* of the *Login* attempt.
- *IP Address* of the workstation initiating the *Login* attempt.

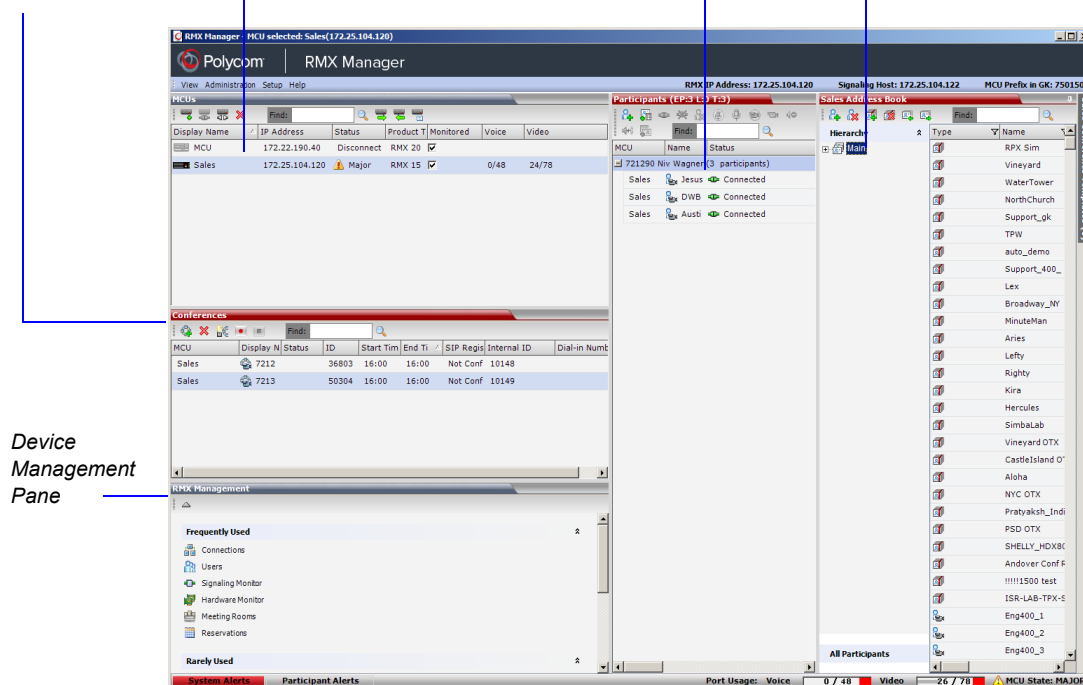
The list of unsuccessful *Logins* can contain up to ten records.

Failed *Login* attempts are written to the system *Log Files* and are recorded as *Audit Events*. The *Audit* files can be retrieved by the Administrator User.

## RMX Manager Screen Components

The *RMX Manager Main Screen* is displayed only when at least one MCU is connected.

*Ongoing Conferences Pane*      *MCUs Pane*      *List Pane*      *Address Book Pane*  
*The selected MCU is highlighted*





Only one MCU can be selected in the *MCUs* pane. If only one MCU is connected, it is automatically selected. The selected MCU is highlighted.

The menu items, the *RMX Management* features, the *Address Book* and the *Conference Templates* are all properties of the selected MCU and apply to it.

## MCUs Pane







The MCUs pane includes a list of MCUs and a toolbar.

Display Name	IP Address	Status	Product T	Monitored	Voice	Video
 172.22.186.45	172.22.186.45	Disconnect	RMX 40	<input checked="" type="checkbox"/>		
 172.22.190.40	172.22.190.40	Normal	RMX 20	<input checked="" type="checkbox"/>	0/96	0/66

For each listed MCU, the system displays the following information:

- MCU *Display Name* - the name of the MCU and its icon according to its type and connection status. The following icons are available:

**Table 2-1** MCU Icons and Statuses

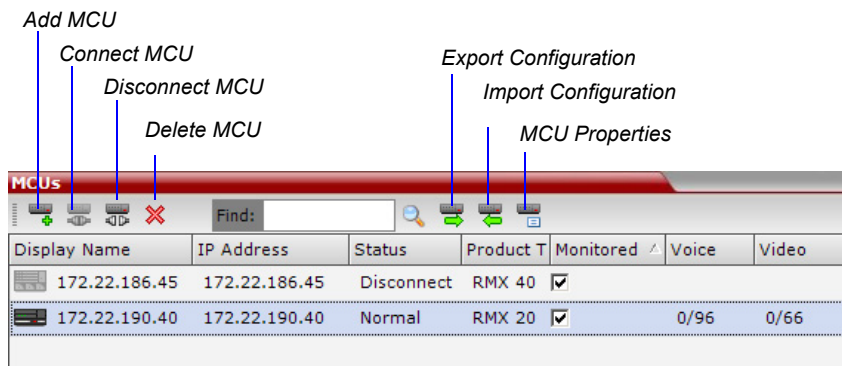
Icon	Description
	RealPresence Collaboration Server (RMX) 1500, disconnected.
	RealPresence Collaboration Server (RMX) 1500, connected.
	RealPresence Collaboration Server (RMX) 2000, disconnected.
	RealPresence Collaboration Server (RMX) 2000, connected.
	RealPresence Collaboration Server (RMX) 4000, disconnected.
	RealPresence Collaboration Server (RMX) 4000, connected.

- *IP Address* of the MCU's control unit.
- *Status* - The status of the MCU:
  - *Connected* - the MCU is connected to the *RMX Manager* and can be managed by the *RMX Manager* user.
  - *Disconnected* - The MCU is disconnected from the *RMX Manager*
  - *Major* - The MCU has a major problem. MCU behavior could be affected and attention is required.
- *Product Type* - The MCU type: RealPresence Collaboration Server 1500/2000/4000. Before connecting to the MCU for the first time, the *RMX* type is unknown so *RMX* is displayed instead as a general indication.
- *Monitored* - When checked indicates that the conferences running on this MCU are automatically added to the *Conferences* list and monitored. To stop monitoring the conferences running on this MCU and their participants, clear the *Monitored* check box.
- *Video Resources* - The number of video resources that are available for conferencing.
- *Audio Resources* - The number of audio resources that are available for conferencing.



## MCUs Toolbar

The *MCUs* toolbar contains the following buttons:

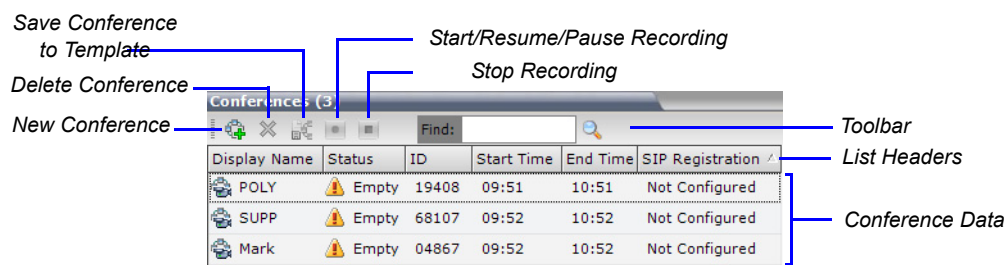


## Conferences List

If you are logged in as a user with *Operator* or *Administrator* permissions:


The *Conferences* pane lists all the conferences currently running on the MCU along with their *Status*, *Conference ID*, *Start Time* and *End Time* data. The number of ongoing conferences is displayed in the pane's title.

The *Conferences* list toolbar contains the following buttons:



- **New Conference** – to start a new ongoing conference.
- **Delete Conference** – delete the selected conference(s).

If *Conference Recording* is enabled the following are displayed in color:

- **Start/Resume Recording** – start/resume recording.
- **Stop Recording** – stop recording.
- **Pause** –  toggles with the *Start/Resume* button.

## List Pane

The *List* pane displays details of the item selected in the *Conferences* pane or *RMX Management* pane. The title of the pane changes according to the selected item.



## RMX Management

The *RMX Management* pane lists the entities that need to be configured to enable the RMX to run conferences. Only users with *Administrators* permission can modify these parameters.

The *RMX Management* pane is divided into two sections:

- **Frequently Used** – parameters often configured monitored or modified.
- **Rarely Used** – parameters configured during initial system set-up and rarely modified afterward.

## Status Bar

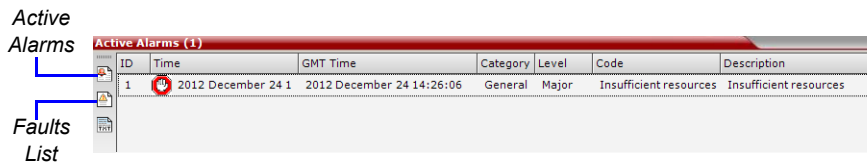
The Status Bar at the bottom of the *RMX Manager* contains *System* and *Participant Alerts* tabs as well as *Port Usage Gauges* and an *MCU State* indicator.



## System Alerts

This is a list of system problems. The alert indicator flashes red when at least one system alert is active. The flashing continues until a user with Operator or Administrator permission reviews the list.

The *System Alerts* pane is opened and closed by clicking the **System Alerts** button in the left corner of the *Status Bar*.



For more information about **Active Alarms** and **Faults List**, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide, "System and Participant Alerts"*.

## Participant Alerts

This is a list of participants that are experiencing connection problems. It is sorted by conference.

The *Participant Alerts* pane is opened and closed by clicking the **Participant Alerts** button in the left corner of the *Status Bar*.

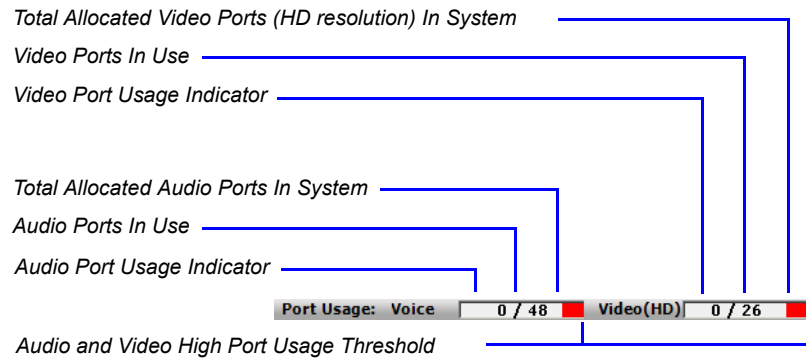
Conference	Name	Status	Disconnection Ti	Role	IP Address/Phone	Alias Name/SIP	Network	Dialing Direction	Audio	Video
SUPPORT_1228	HDX 4000 T	Disconnected	2012 December		10.253.72.24		SIP	Dial out		
SUPPORT_1228	Jeffrey	Disconnected	2012 December		10.253.72.18		H.323	Dial out		
SUPPORT_1228	Jeffrey SIP	Disconnected	2012 December		10.253.72.18		H.323	Dial out		

## Port Usage Gauges

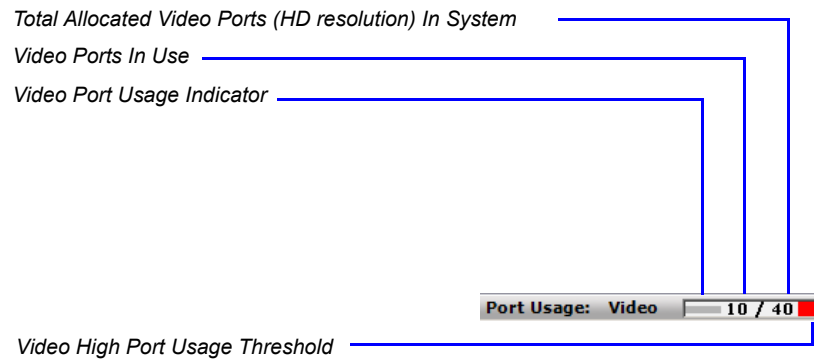
The *Port Usage* gauges indicates:

- The total number of *Video* or *Voice* ports in the system according to the *Video/Voice Port Configuration*.
- The number of *Video* and *Voice* ports in use.

- The *High Port Usage* threshold.



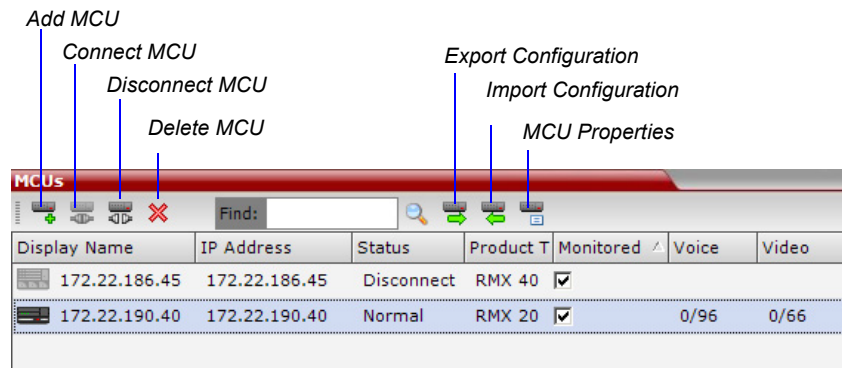
Starting from version 8.0/8.1, the basic unit used for reporting video resource usage in the Port Gauges has changed from CIF to HD720p30. Results are rounded to the nearest integer.



The *High Port Usage* threshold represents a percentage of the total number of video or voice ports available. It is set to indicate when resource usage is approaching its maximum, resulting in no free resources to run additional conferences. When port usage reaches or exceeds the threshold, the red area of the gauge flashes and a *System Alert* is generated. The default port usage threshold is 80% and it can be modified by the system administrator. For more information, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide, "Setting the Port Usage Threshold"*.

## MCUs Toolbar

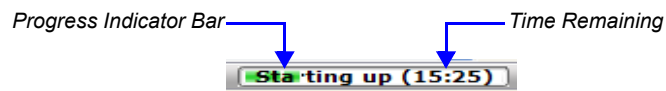
The MCUs toolbar contains the following buttons:



## MCU State

The MCU State indicator displays one of the following:

- The MCU is starting up. The time remaining until the system start-up is complete is displayed between brackets while a green progress indicator bar indicates the start-up progress.



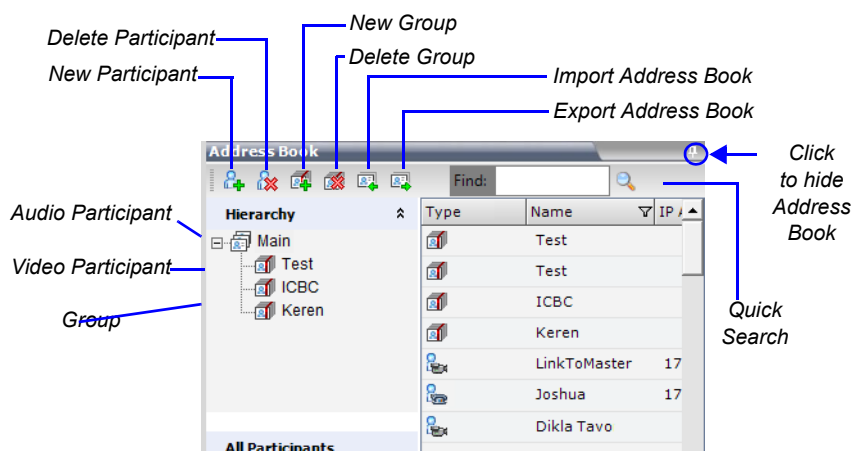
- The MCU is functioning normally.
- The MCU has a major problem. MCU behavior could be affected and attention is required.

## Address Book

The Address Book is a list of Participants and Groups that have been defined on the RMX. The information in the Address Book can be modified only by an administrator. All RMX users can, however, view and use the Address Book to assign participants to conferences.

The Address Book toolbar contains a Quick Search field and the following six buttons:

- *New Participant*
- *Delete Participant*
- *Import Address Book*
- *New Group*
- *Delete Group*
- *Export Address Book*



Address Book entries are listed according to:

- **Type** - whether an individual *Participant* or a *Group* of participants
- **Name** - of the participant or group
- **Dialing Direction** - Dial-in or Dial-out
- **IP Address/Phone** - of the participant

## Displaying and Hiding the Address Book

The first time you access the *Collaboration Server Manager*, the *Address Book* pane is displayed as a closed tab. You can open it by clicking the anchor pin (📌) button.

The *Address Book* pane closes and a tab appears at the right edge of the screen.

Click the tab to re-open the *Address Book*.



## Conference Templates

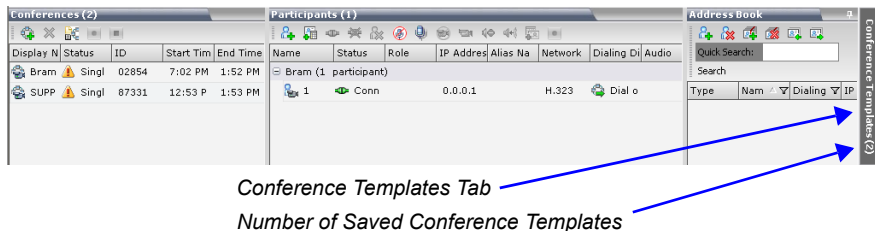
*Conference Templates* enable administrators and operators to create, save, schedule and activate identical conferences.

A *Conference Template*:

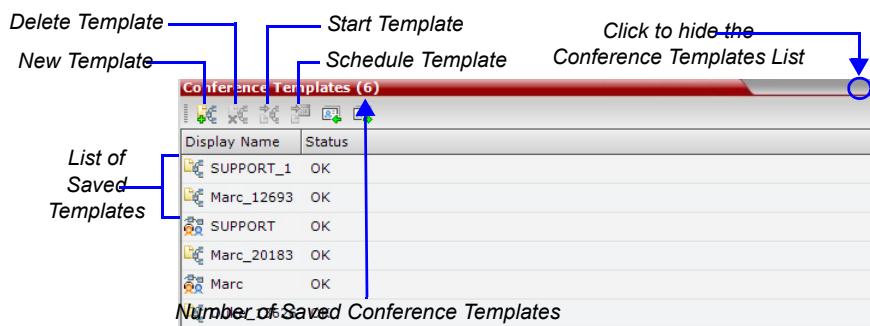
- Saves conference and Operator conference Profiles.
- Saves all participant parameters including their *Personal Layout* and *Video Forcing* settings.
- Simplifies the setting up *Telepresence* conferences where precise participant layout and video forcing settings are crucial.

## Displaying and Hiding Conference Templates

The *Conference Templates* list pane is initially displayed as a closed tab in the *RMX Manager* main window. You can open it by clicking the anchor pin (📌) button. The number of saved *Conference Templates* is indicated on the tab.



Clicking the tab opens the *Conference Templates* list pane.



Hide the *Conference Templates* list pane by clicking the anchor pin (📌) button in the top right corner of the pane.

The *Conference Templates* list pane closes and a tab appears in the top right corner of the screen.

## Adding MCUs to the MCUs List

The *RMX Manager* can connect to one or several *RMX*s simultaneously. If the site's configuration includes more than one MCU, or when a new MCU is added to your configuration, and you want to monitor and control all MCUs from within the same window, you must add the MCU to the MCUs list.



The *RMX* must be installed and its IP addresses properly configured in the Management Network Service before defining its connection parameters in the *RMX Manager* application.

To add the MCU to the list of MCUs being managed, define the MCU's connection parameters.

### To add a *RMX* unit:

- 1 On the *MCUs* toolbar, click the **Add MCU**  button to add an MCU to the MCU list. The *Add MCU* dialog box opens.

## 2 Define the following parameters:

**Table 3** MCU Properties

Field	Description
<i>MCU Name</i>	Enter the name of the MCU on the network.
<i>MCU IP</i>	Enter the IP address of the MCU's Control Unit. The IP address must be identical to the one configured in the MCU during first entry Configuration. For more details, see "Procedure 2: Gather Network Equipment and Address Information" on page 1-20.
<i>Port</i>	Enter the number of the port used for communication and data transactions between the <i>RMX</i> unit and the <i>RMX Manager</i> . For standard connection, enter <b>80</b> . For a Secured connection (using TLS or SSL), enter <b>443</b> .
<i>Username</i>	Enter the user name with which you will login to the MCU. A User with this name must be defined in the <i>RMX</i> Users list. The system is shipped with a default User whose name is POLYCOM.
<i>Password</i>	Enter the password as defined for the user name with which you will login to the MCU. The system is shipped with a default User whose password is POLYCOM.
<i>Secure Mode</i>	<b>Optional.</b> Select this check box to connect to the <i>RMX</i> with SSL and work in Secure Mode.
<i>Remember Login</i>	This check box is automatically selected, and it enables the usage of the user name and password entered in this dialog box when connecting to the <i>RMX</i> . If this check box is cleared, the user is prompted for the user name and password when connecting to this <i>RMX</i> unit.
<i>Auto Reconnection</i>	Select this check box to automatically reconnect to the <i>RMX</i> if the connection between the <i>RMX Manager</i> and the MCU is broken.
<i>Interval</i>	Enter time in seconds between reconnect ion attempts to the <i>RMX</i> . For example, if you enter 10, the system will wait 10 seconds between the connection attempts.

**Table 3** MCU Properties (Continued)

Field	Description
<i>Max Time</i>	Enter the maximum amount of time in seconds that the <i>RMX</i> is allowed to try to reconnect. If the <i>RMX</i> reconnects before the allotted time frame the count down timer is halted. For example, if you enter 100, the system will stop trying to reconnect if it has failed to do so within 100 seconds.

- Click **OK**.  
The MCU is added to the MCUs pane.
- If required, repeat steps 1-3 to define additional *RMX* units.  
The *MCUs* pane contains the list of all defined MCUs.

Display Name	IP Address	Status	Product T	Monitored	Voice	Video
	172.22.186.45	172.22.186.45	Disconnect	RMX 40	<input checked="" type="checkbox"/>	
	172.22.190.40	172.22.190.40	Normal	RMX 20	<input checked="" type="checkbox"/>	0/96 0/66

## Customizing the Main Screen

You can customize the main screen according to your preferences. Pane sizes can be changed, column widths can be adjusted and data lists can be sorted.



Customization settings are automatically saved for each logged-in user. The next time the *RMX Manager* is opened, the main screen settings appear as they were when the user exited the application.

### To re-size a pane:

- >> Move the pointer over the pane border and when the pointer becomes a click and drag the pane border to the required size and release the mouse button.

### To adjust column width:

- In the column header row, place the pointer on the vertical field- separator bar of the column.
- When the pointer becomes a , click and drag the field separator bar to the required column size and release the mouse button.

### To sort the data by any field (column heading):

- In the *Conference* list or *List* view pane, click on the column heading of the field to be used for sorting.  
A or symbol appears in the column heading indicating that the list is sorted by this field, as well as the sort order.
- Click on the column heading to toggle the column's sort order.

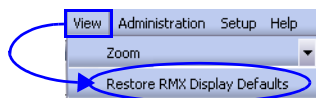
### To change the order of columns in a pane:

- >> Click the column heading to be moved and drag it to its new position. When a set of red arrows appears indicating the column's new position, release the mouse button.



**To restore the RMX 2000 display window to its default configuration:**

>> On the *RMX 2000* menu, click **View > Restore RMX Display Defaults**.



## Customizing the RMX Management Pane

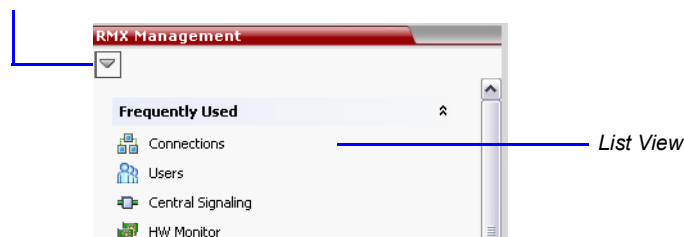
The *RMX Management* pane can be viewed either as a list or as a toolbar.

**To switch between Toolbar and List Views:**

>> In the *RMX Management* pane, click the *Toolbar View* button to switch to Toolbar view.

>> In Toolbar view, click the *List View* button to switch back to List view.

*Toolbar View Button*





*List View Button*




You can move items between the *Frequently Used* and *Rarely Used* sections depending on the operations you most commonly perform and the way you prefer to work with the *RXM Manager*.

This only works in *List* view because in *Toolbar* view, all items are represented by icons.

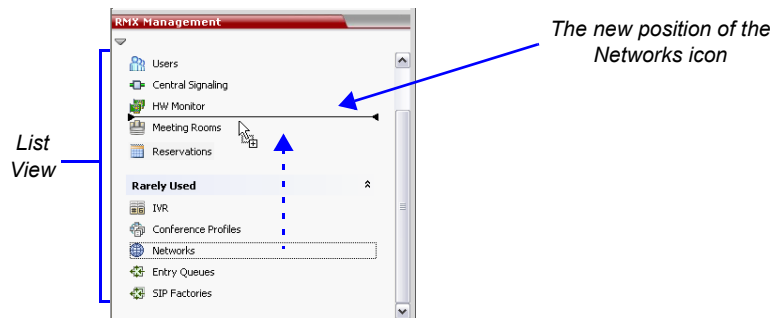
**To expand or Collapse the Frequently Used and Rarely Used sections:**

The *Frequently Used* and *Rarely Used* sections can be expanded or collapsed by clicking the  and  buttons.

**To move items within and between the Frequently Used and Rarely Used sections:**

- 1 In the *RMX Management* pane click and drag the icon of the item that you wish to move. An indicator line () appears indicating the new position of the icon.

- 2 Release the mouse button when the icon is in the desired position.



## Starting a Conference

There are several ways to start a conference:

- Clicking the *New Conference* button in the *Conferences* pane. For more information, see "*Starting a Conference from the Conferences Pane*" on page [2-16](#).
- Dialing in to a *Meeting Room*.
  - A *Meeting Room* is a conference that is saved on the MCU. It remains in passive mode until it is activated by the first participant, or the meeting organizer, dialing in.

For more information about Meeting Rooms, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*, "*Meeting Rooms*".

- Dialing in to an *Ad Hoc Entry Queue* which is used as the access point to the MCU. For a detailed description of *Ad Hoc Entry Queues*, see the *Collaboration Server 1500/2000/4000 Administrator's Guide*, "*Entry Queues, Ad Hoc Conferences and SIP Factories*".
- Start a *Reservation*:
  - If the *Start Time* of the *Reservation* is past due the conference becomes ongoing immediately.
  - If the *Start Time* of the *Reservation* is in the future the conference becomes ongoing, at the specified time on the specified date.

For more information, see "*Starting a Reservation*" on page [2-24](#).

- Start from any Conference Template saved in the *Conference Templates* list.



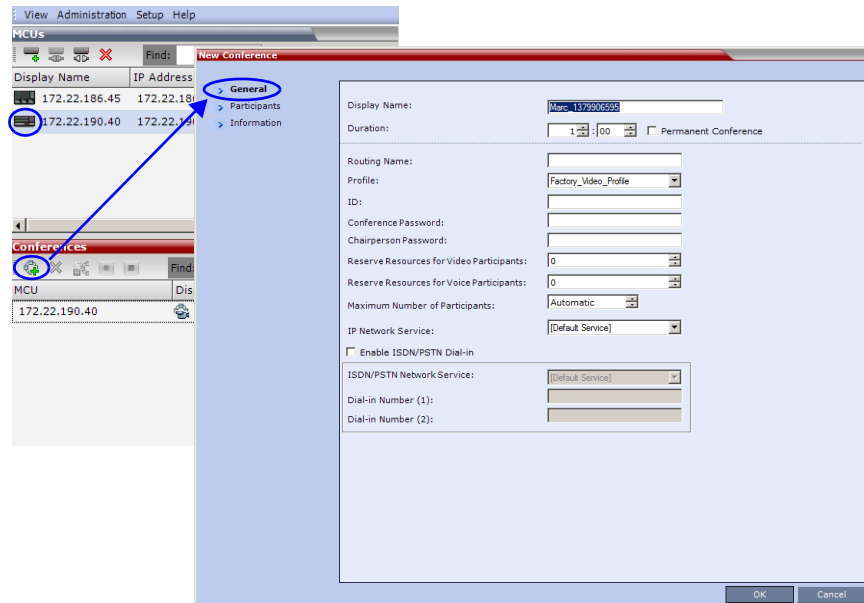
Although *SVC Conferencing Mode* options are available in *Conference Profiles*, it is advised that they not be used with *Version 8.3.0.J*.

## Starting a Conference from the Conferences Pane

To start a conference from the Conference pane:

- 1 In the *MCUs* pane, select the MCU to run the conference.
- 2 In the *Conferences* pane, click the **New Conference** (📍) button.

The *New Conference – General* dialog box opens.



The system displays the conference's default *Name*, *Duration* and the default *Profile*, which contains the conference parameters and media settings.

The *RMX* automatically allocates the conference *ID*, when the conference starts.

In most cases, the default conference *ID* can be used and you can just click **OK** to launch the conference. If required, you can enter a conference *ID* before clicking **OK** to launch the conference.

If you are the meeting chairperson or organizer using the *RMX Manager* to start your own meeting, you need to communicate the default conference *ID* (or the one you created) to the other conference participants so they can dial in.

You can use the *New Conference - General* dialog box to modify the conference parameters. If no defined participants are to be added to the conference, or you do not want to add additional information, click **OK**.

## General Tab

### 3 Define the following parameters:

**Table 2-1** *New Conference – General Options*

Field	Description
<i>Display Name</i>	<p>The Display Name is the conferencing entity name in native language character sets to be displayed in the RMX Manager. In conferences, Meeting Rooms and Entry Queues the system automatically generates an ASCII name for the <i>Display Name</i> field that can be modified using Unicode encoding.</p> <ul style="list-style-type: none"> <li>English text uses ASCII encoding and can contain the most characters (length varies according to the field).</li> <li>European and Latin text length is approximately half the length of the maximum.</li> <li>Asian text length is approximately one third of the length of the maximum.</li> </ul> <p>The maximum length of text fields also varies according to the mixture of character sets (Unicode and ASCII). Maximum field length in ASCII is 80 characters. If the same name is already used by another conference, Meeting Room or Entry Queue, the Collaboration Server displays an error message requesting you to enter a different name.</p> <p><b>Note:</b> This field is displayed in all tabs.</p>
<i>Duration</i>	<p>Define the duration of the conference in hours using the format HH:MM (default 01:00).</p> <p><b>Note:</b> This field is displayed in all tabs.</p>
<i>Routing Name</i>	<p><i>Routing Name</i> is the name with which ongoing conferences, Meeting Rooms and Entry Queues register with various devices on the network such as gatekeepers. This name must be defined using ASCII characters.</p> <p><b>Comma, colon and semicolon characters cannot be used in the <i>Routing Name</i>.</b></p> <p>The <i>Routing Name</i> can be defined by the user or automatically generated by the system if no <i>Routing Name</i> is entered as follows:</p> <ul style="list-style-type: none"> <li>If ASCII characters are entered as the <i>Display Name</i>, it is used also as the <i>Routing Name</i></li> <li>If a combination of Unicode and ASCII characters (or full Unicode text) is entered as the <i>Display Name</i>, the <i>ID</i> (such as Conference ID) is used as the <i>Routing Name</i>.</li> </ul> <p>If the same name is already used by another conference, Meeting Room or Entry Queue, the RMX displays an error message and requests that you to enter a different name.</p>

**Table 2-1** *New Conference – General Options (Continued)*

Field	Description
<i>Profile</i>	The system displays the name of the default Conference Profile. Select the required Profile from the list. The Conference Profile includes the Conference line rate, media settings and general settings. For a detailed description of Conference Profiles, see the <i>RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide, "Conference Profiles"</i> .
<i>ID</i>	Enter the unique-per-MCU conference ID. If left blank, the MCU automatically assigns a number once the conference is launched. This ID must be communicated to conference participants to enable them to dial in to the conference.
<i>Conference Password</i>	Enter a password to be used by participants to access the conference. If left blank, no password is assigned to the conference. This password is valid only in conferences that are configured to prompt for a conference password.
<i>Chairperson Password</i>	Enter a password to be used by the RMX to identify the <i>Chairperson</i> and grant him/her additional privileges. If left blank, no chairperson password is assigned to the conference. This password is valid only in conferences that are configured to prompt for a chairperson password.
<i>Reserve Resources for Video Participants</i>	Enter the number of video participants for which the system must reserve resources. Default: 0 participants. Maximum: 80 participants.
<i>Reserve Resources for Audio Participants</i>	Enter the number of audio participants for which the system must reserve resources. Default: 0 participants. Maximum: 120 participants.

- 4 If all participants are undefined, dial-in and no additional information is required for the new conference, click **OK**.
- 5 To add participants from the *Participants Address Book* or to define participants (mainly dial-out participants) click the *Participants* tab.

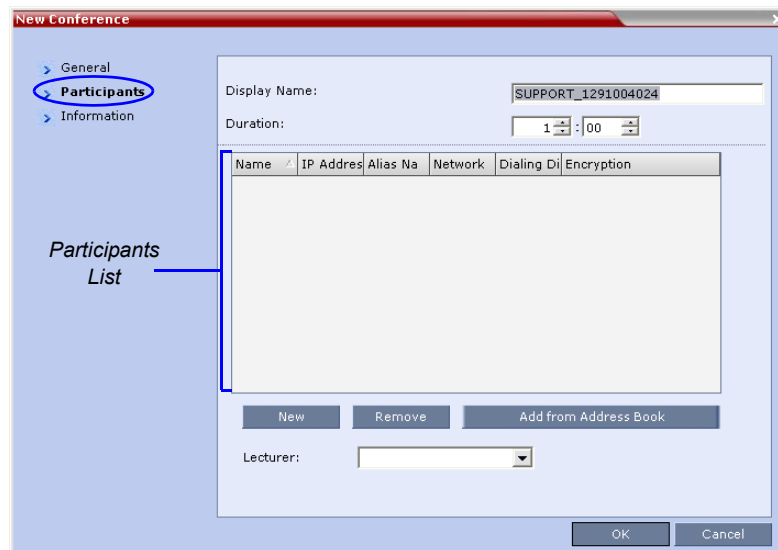
### Participants Tab



This procedure is optional.  
The *Participants* tab is used to add participants to the conference from the *Address Book*. It is also used to add defined dial-out participants to the conference. Defined dial-out participants are connected to the conference automatically when the conference is launched

- 6 Click the **Participants** tab.

The *Participants* tab opens.



When defining a new conference, the *Participants List* is empty.

The following table describes the information displayed in the *Participants List* and the operations that can be performed.

**Table 2-2** *New Conference – Participants Tab*

Column / Button	Description
<b>Participants List</b>	
<i>Name</i>	A Unicode field that displays the participant's name and an icon representing the endpoint type: <i>Audio Only</i> or <i>Video</i> .
<i>IP Address/Phone</i>	Indicates the IP address or phone number of the participant's endpoint. <ul style="list-style-type: none"> <li>For dial-out connection, displays the IP address or phone number of the endpoint called by the RMX.</li> <li>For dial-in connection, displays the participant's IP address or phone number used to identify and route the participant to the appropriate conference.</li> </ul>
<i>Alias Name (IP Only)</i>	Displays the alias name of an H.323 endpoint.
<i>Network</i>	The network communication protocol used by the endpoint to connect to the conference: <i>H.323</i> or <i>ISDN/PSTN</i> .
<i>Dialing Direction</i>	<b>Dial-in</b> – The participant dials in to the conference <b>Dial-out</b> – The Collaboration Server dials out to the participant
<i>Encryption</i>	Displays whether the endpoint uses encryption for its media. The default setting is <i>Auto</i> , indicating that the endpoint must connect according to the conference's encryption setting. <b>Note:</b> The H.320 protocol (ISDN/PSTN) does not support encryption.
<b>Buttons</b>	
New	Click to define a new participant. For more information, see the <i>RealPresence Collaboration Server (RMX) 2000/4000 Administrator's Guide</i> , "Adding a new participant to the Address Book Directly".
Remove	Click to remove the selected participant from the conference.
Add from Address Book	Click to add a participant from the <i>Address Book</i> to the conference.
<i>Lecturer</i>	This option is used to activate the <i>Lecture Mode</i> . Select the participant you want to designate as <i>Lecturer</i> from the drop-down menu list of conference participants.

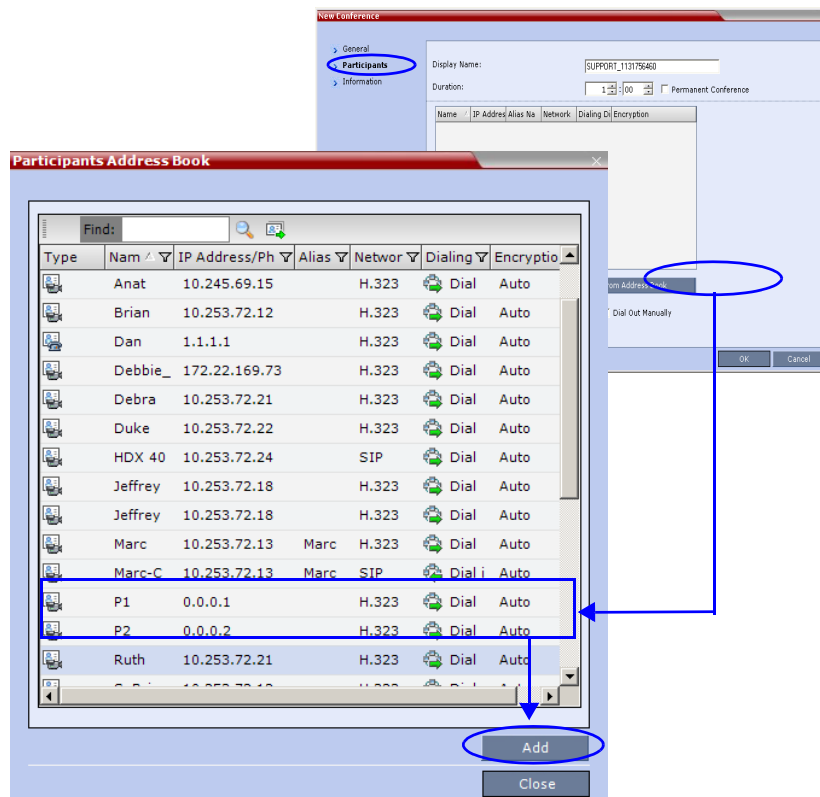
Participants can be added to the conference in the following methods:

- Defining a new participant during the definition of the conference (clicking the New button).

- Adding pre-defined participants from the *Address Book* by either selecting the participants from the list or dragging and dropping the participants from the *Address Book* to the Participants list.
- Dial-in participants can connect to the conference after it was started (without using the New Conference - Participants dialog box).
- Once the conference has started, participants can be added to a conference directly from the *Participants Address Book* without having to use the *New Conference - Participants* tab. For more details, see "Adding Participants from the Address Book" on page 2-41.

#### To add participants from the Address Book:

- 7 In the *Participants List*, click the **Add from Address Book** button to open the *Participants Address Book*.



- 8 In the *Participants Address Book*, select the participants that you want to add to the conference and click the **Add** button.  
Standard Windows multiple selection techniques can be used in this procedure.
- 9 The selected participants are assigned to the conference and appear in the *Participant List*.
- 10 Select additional Participants or click the **Close** button to return to the *Participants* tab.



## Information Tab

In the *Info* fields, you can add general information about the conference, such as contact person name, company name, billing code, etc.

This information is written to the *Call Detail Record (CDR)* when the conference is launched. Changes made to this information once the conference is running are **not** saved to the *CDR*.



This procedure is optional.  
The information entered into these fields does not affect the conference.

### To add information to the conference:

- 11 Click the **Information** tab.

The *Information* tab opens.

- 12 Enter the following information:

**Table 2-3** *New Conference – Info Options*

Field	Description
<i>Info1, 2, 3</i>	There are three information fields that allow you to enter general information for the conference such as company name, contact person etc. Unicode can be used in these fields. The maximum length of each field is 80 characters.
<i>Billing</i>	Enter the conference billing code if applicable.

- 13 Click **OK**.

An entry for the new conference appears in the *Conferences* pane.

If an ISDN/PSTN dial-in number was assigned to the conference either automatically or manually, this number can be viewed in the *Conferences* pane.

If no participants were defined for the conference or as long as no participants are connected, the indication *Empty* and a warning icon (⚠) appear in the *Status* column in the *Conferences* pane.

The status changes when participants connect to the conference.

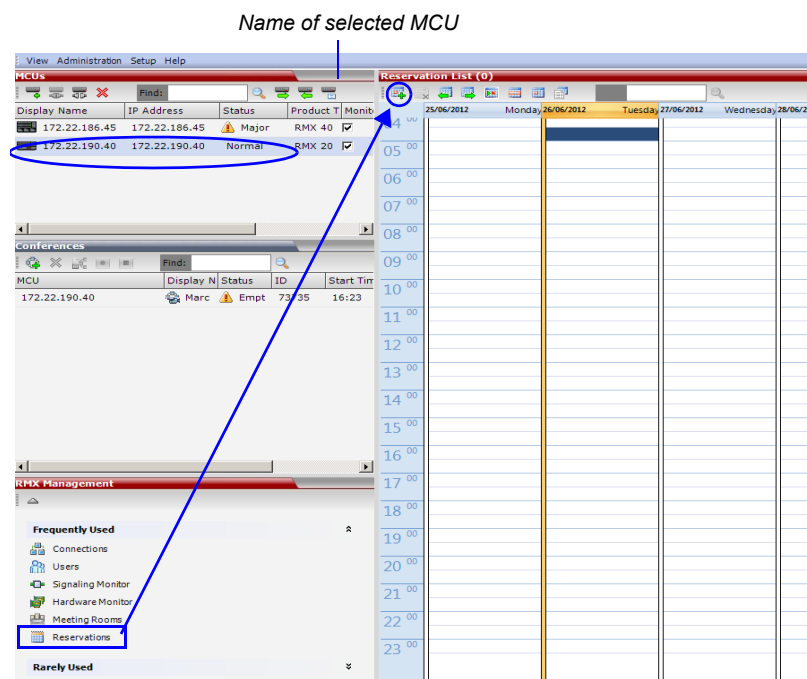
If no participant connects within the time specified in the *Conference Profiles > Auto Terminate > Before First Joins* field, the conference is automatically terminated by the system.

## Starting a Reservation

To start a conference from the Reservation Calendar:

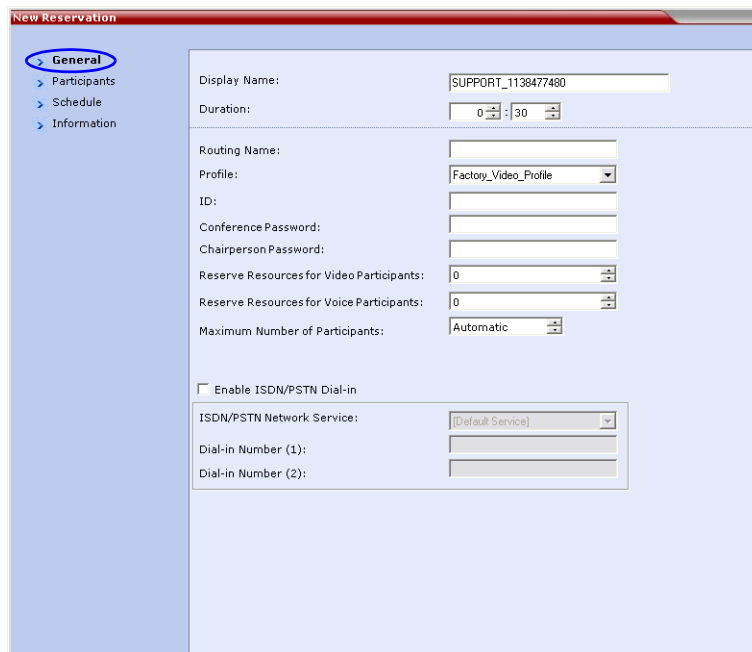
- 1 In the *MCUs* pane, select the MCU to run the conference.
- 2 In the *RMX Management* pane, click the *Reservation Calendar* button (📅).

The *Reservation Calendar* is displayed.



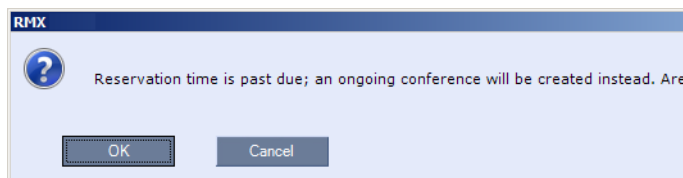
- 3 Click the **New Reservation** (📅+) button.

The *New Reservation – General* tab dialog box opens.



- 4 **Optional.** Select the **Enable ISDN/PSTN Dial-in** check box if you want ISDN and PSTN participants to be able to connect directly to the conference.
- 5 If *Enable ISDN/PSTN Dial-in* option is selected, either enter a dial-in number, or leave the *Dial-in Number* field blank to let the system automatically assign a number from the dial-in range defined for the selected ISDN/PSTN Network Service.
- 6 Click the **OK** button.

A confirmation box is displayed stating that the *Reservation* time is past due and that the conference will become ongoing.



- 7 Click the **OK** button.

The conference is started. If an ISDN/PSTN dial-in number was assigned to the conference either automatically or manually, this number can be viewed in the *Conferences* pane.

For more information about *Reservations*, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*, "Reservations".

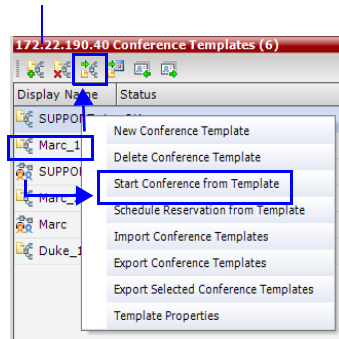
## Starting an Ongoing Conference From a Template

An ongoing conference or a Reservation can be started from any Conference Template saved in the *Conference Templates* list of the selected MCU.

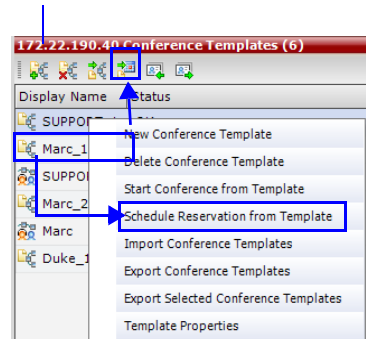
**To start an ongoing conference or a reservation from a Template:**

- 1 In the *MCUs* pane, select the MCU to run the conference.
- 1 In the *Conference Templates* list, select the Template you want to start as an ongoing conference.
- 2 Click the **Start Conference from Template** (📅) button to start a conference or **Schedule Reservation from Template** (📅) button to schedule a reservation.  
or  
Right-click and select **Start Conference from Template** to start an ongoing conference or **Schedule Reservation from Template** to schedule a reservation.

Name of selected MCU



Name of selected MCU



The conference is started.



If a Conference Template is assigned a dial-in number that is already assigned to an ongoing conference, Meeting Room, Entry Queue or Gateway Profile, when the template is used to start an ongoing conference or schedule a reservation it will not start. However, the same number can be assigned to several conference templates provided they are not used to start an ongoing conference at the same time. If a dial in number conflict occurs prior to the conference's start time, an alert appears: "ISDN dial-in number is already assigned to another conferencing entity" and the conference cannot start.

The name of the ongoing conference in the *Conferences* list is taken from the Conference Template *Display Name*.

Participants that are connected to other ongoing conferences when the template becomes an ongoing conference are not connected.



If an ongoing conference, Meeting Room or Entry Queue with the same *Display Name*, *Routing Name* or *ID* already exist in the system, the conference will not be started.

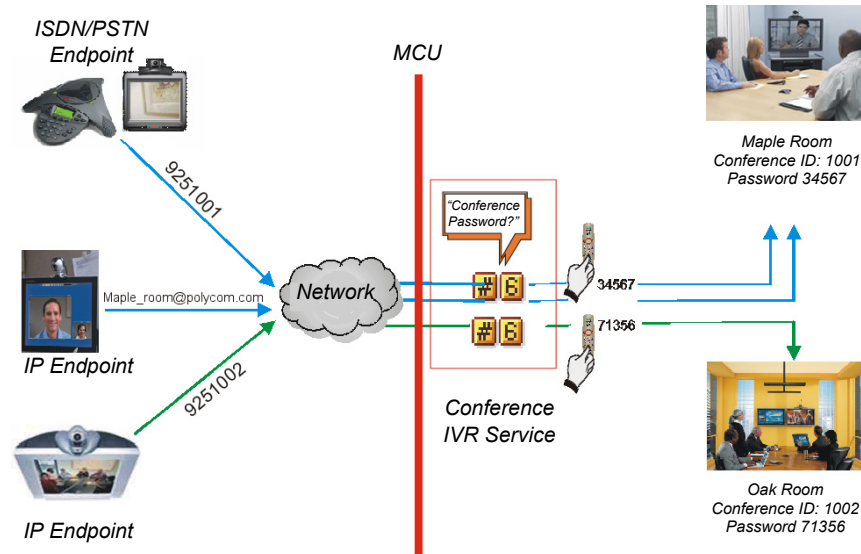
For detailed description of Conference Templates, see *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide, "Conference Templates"*.

# Connecting to a Conference

## Direct Dial-in

Participants must be provided with a dialing string which can vary according to the network type, conference password and chairperson password.

Participants dial the conference dial-in string and are connected to the conference *IVR Service*. Once the correct information, such as the conference password and chairperson password are entered, the participants are connected to the conference.



### Dial-in Connection via IVR System

The chairperson can use the chairperson password as the conference password and does not need to enter the conference password.



Participants connecting to HD Video Switching conferences must have HD capable endpoints and must connect using the same line rate as defined for the conference. If not, they are connected as Secondary (audio only participants).

## H.323 Participants

For *H.323* participants, the dialing string is composed of the MCU prefix in the Gatekeeper and the Conference ID.

### Example:

Prefix in gatekeeper	925
Conference ID	1001
Conference Name	Maple_Room

>> The participant dials 9251001 or 925Maple\_room

If there is no gatekeeper defined for the network, *H.323* participants dial the MCU's signaling host IP address and the conference ID, separated by ##.

### Example:

MCU (Signaling Host) IP address	172.22.30.40
Conference ID	1001

>> The participant dials 172.22.30.40##1001

## Entry Queue Access

Access via an Entry Queue allows all participants to dial the same entry point that acts as a routing lobby. Once in the Entry Queue, participants are guided to the conference according to the conference ID they enter.

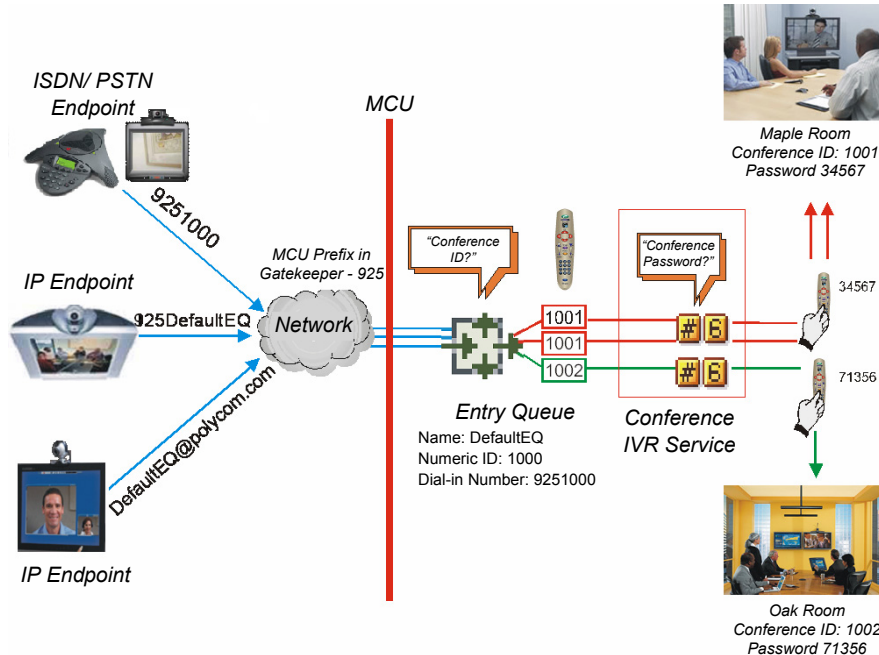


Figure 2-1: Dial-in Connection via Entry Queue

Dialing is executed in the same way as for conferences, where the Entry Queue ID/Name replaces the Conference ID/Name.

### H.323 Participants

H.323 participants dial [Gatekeeper Prefix][Entry Queue ID/Name].

**Example:**

Prefix in gatekeeper	925
Entry Queue ID	1000
>> The participant dials	9251000

H.323 participants can bypass the Entry Queue IVR voice messages by adding the correct Conference ID of destination conference to the initial dial string:

[Gatekeeper Prefix][EQ ID][##Destination Conference ID]

**Example:**

Conference ID	1001
>> H.323 participants dial	9251000##1001

H.323 participants can also bypass the conference IVR voice messages by adding the Conference Password to the initial dial string:

[Gatekeeper Prefix][EQ ID][##Destination Conference ID][##Password]

**Example:**

Conference ID	1001
Conference Password	34567
>> H.323 participants dial	9251000##1001##34567

## ISDN and PSTN Participants

Up to two dial-in numbers can be allocated to an Entry Queue for use by ISDN and PSTN participants.

Calls to numbers within the ISDN and PSTN *Dial-in Range* that are not allocated to an Entry Queue are routed to the *Transit Entry Queue*.

Dial-in ISDN and PSTN participants dial one of the dial-in numbers assigned to the Entry Queue, including the country and area code (if needed). They are routed to their conference according to the conference ID.

### Example:

```
Entry Queue ID           1000
Assigned Dial-in number  9251000
>> ISDN/PSTN participants dial  9251000
```

Once connected to the Entry Queue, they enter the conference Numeric ID or password to be routed to the appropriate conference.

## Dial-out Participants

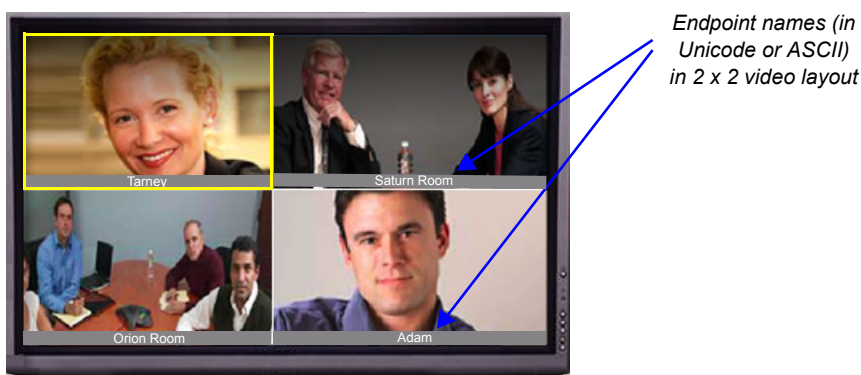
Dial-out participants are defined with their dial-out number. Once they are added to the ongoing conference, the MCU automatically calls them at a rate of 1 dial-out per second, using the default *H.323* or ISDN/PSTN Network Service defined for them.

## Text Indication in the Video Layout

### Endpoint Names

During conferences you can view the names of the endpoints that are connected to the conference in your endpoint's video layout windows. The MCU can display up to 33 characters of the endpoint's name, depending on the window's layout (size).

The following is an example of endpoint name display in the endpoint screen:



The displayed name is determined as follows:

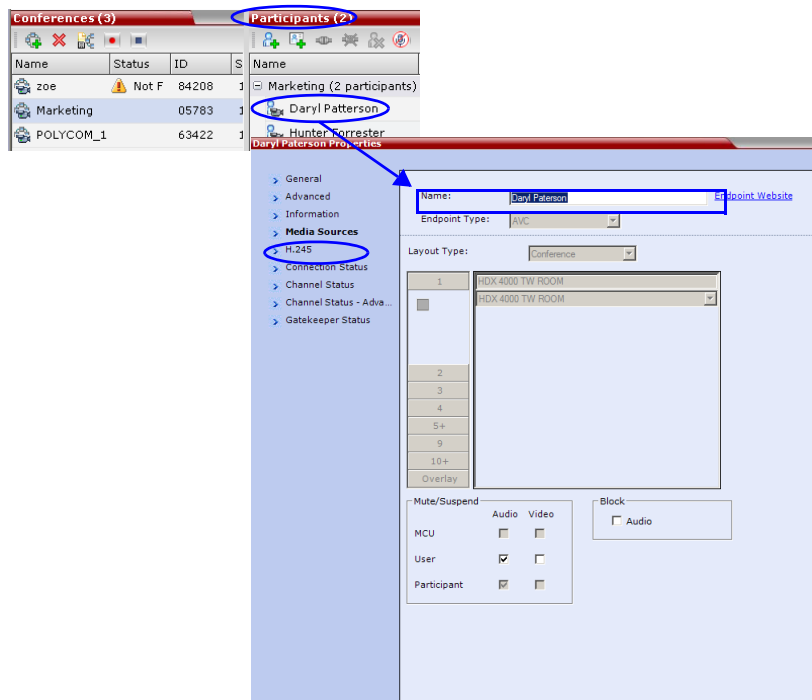
- The system displays the name that is defined at the endpoint.
- If the endpoint does not send its name:

- For a defined H.323 participant:
  - The system displays the name from the participant definition.
- For an undefined H.323 participant:
  - Display the *H.323 ID* alias.
  - or
  - Display the *E.164* alias.
  - or
  - Display nothing if all the fields are empty.
- For a defined H.320 participant:
  - The system displays the name from the participant definition.
- For an undefined H.320 participant:
  - Display the *Terminal Command String (TCS-2)* to identify the participant.
  - or
  - Display nothing if the string is not received or empty.
- If the endpoint's *Display Name* is changed in the *RMX Manager*, it overrides all the above.

**To change the Display Name:**

- 1 In the *Participants* list, double-click the participant or right-click the participant and then select **Participant Properties**.

The *Participant Properties – Media Sources* dialog box opens:



- 2 Enter the new *Display Name* in the *Name* field.
- 3 Click **OK**.

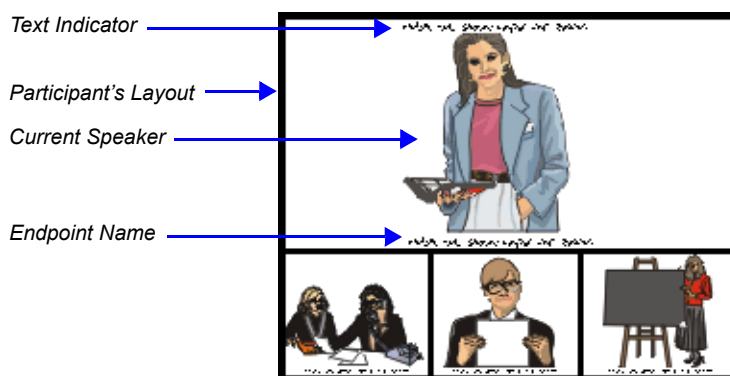


## Text Indication

The *Text Indication* appears in the window of the current speaker in the participant's layout in addition to the endpoint name. It displays the conference Secure mode (on or off), total number of connected participants, number of video participants and number of audio participants.

The text indication is automatically displayed when there is a change in the conference Secure state (when Secure is implemented or cancelled) and it appears only for a few seconds (the same duration as the endpoint names).

The conference chairperson or participants can request the display of a *Textual Indication* of the conference's statistics by entering the DTMF code \*88 on the endpoint's DTMF input device, such as remote control.



The Text Indication is displayed according to the permission set in the Conference IVR Service:

- Chairperson permission: Only the chairperson sees the indication
- Everyone permission: All participants see the indication.



Participants connected as Secondary (no video) will be considered as audio participants; defined participant which are not currently connected to the conference (disconnected, redial, disconnecting, etc.) are not counted.

*Text Indication* can be disabled by adding a new flag to the *System Configuration* and setting its value to NO as follows: `ENABLE_TEXTUAL_CONFERENCE_STATUS=NO`.

This setting is recommended for MCUs running *Telepresence* conferences.

For more information, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*, "System Configuration".

## Transparent Endpoint Names

Endpoint name backgrounds are 50% transparent, and while maintaining contrast, do not completely obscure the overlaid video.

The *Endpoint Name Transparency* feature can be disabled by adding a new flag to the *System Configuration* and setting its value to NO as follows: `SITE_NAME_TRANSPARENCY=NO`.

For more information, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*, "System Configuration".

## Monitoring Ongoing Conferences

When MCUs are connected to the *RMX Manager* they are automatically monitored, that is, any ongoing conference that is started on that MCU is automatically added to the Conferences pane and its participants are monitored.

**To list participants from several conferences (running on the same or different MCUs):**

>> In the *Conferences* pane, using Windows multiple selection methods, select the conferences whose participants you want to list.

The participants are displayed in the *Participants* list pane.

By default, the participants are grouped by conferences, and the name of the MCU is displayed in the first column of the properties table, enabling sorting according to MCU name.

The screenshot shows the Polycom RMX Manager interface. The **Conferences** pane at the bottom left lists several conferences. The **Participants** pane at the top right shows a list of participants grouped by conference. Annotations include:

- Conferences selected for monitoring:** Points to the selected rows in the Conferences pane.
- MCU Name. can be used for sorting by clicking on the column heading:** Points to the 'MCU' column header in the Participants table.
- Group by Conference:** Points to the 'Group by Conference' button in the Participants pane toolbar.

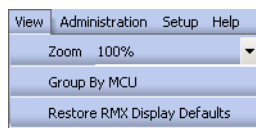
MCU	Name	Status	Role	IP Address	Alias Na	Netw
<b>721290 Niv Wagner (3 participants)</b>						
Sales	Austi	Connected		172.25.	Austin L	H.32
Sales	DWB	Connected		172.25.	DWB_H	H.32
Sales	Jesus	Connected		172.25.	Jesus 80	H.32
<b>721366 Ofir Gonen (9 participants)</b>						
Sales	Niv-H	Connected		172.25.	Niv-HDX	H.32
Sales	MaAll	Connected		172.25.	MaAllen	H.32
Sales	Sharo	Connected		172.25.	HDX 10	H.32
Sales	10.25	Connected		172.25.	10.253.	H.32
Sales	Milija	Connected		172.25.	Milijasev	H.32
Sales	liscot	Connected		172.25.	LiScottC	H.32
Sales	HDX-	Connected		172.25.	HDX-MR	H.32
Sales	Rand	Connected		172.25.	Randy,T	H.32
Sales	Ofirs-	Connected		172.25.	.TIME.1	H.32
<b>Marc (2 participants)</b>						
MCU	Marc	Connected		10.253.		H.32
MCU	HDX	Awaiting Individual assi		10.253.		SIP

## Grouping the Participants by MCU

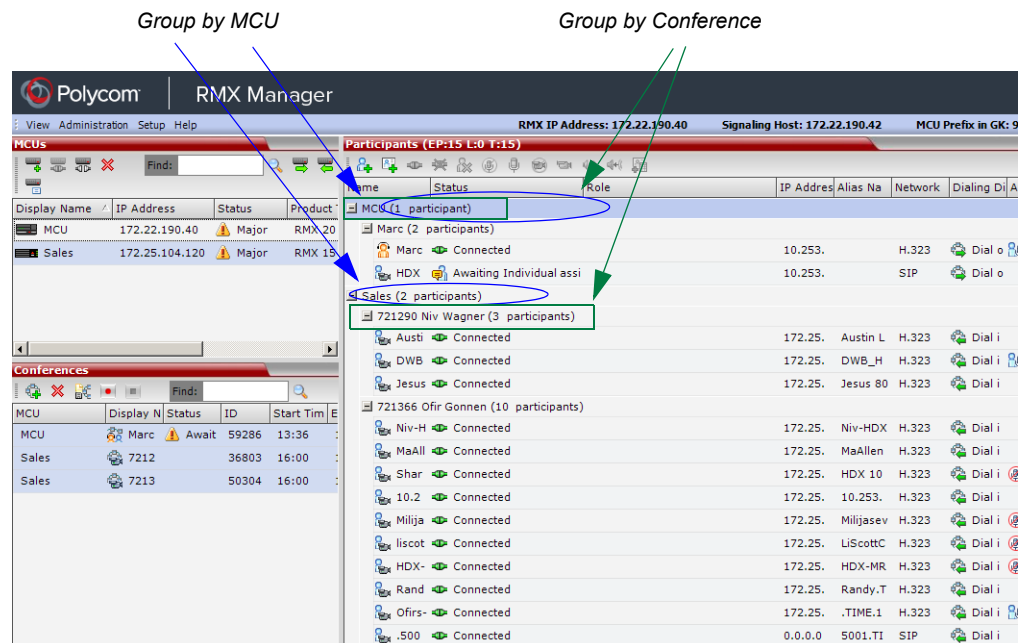
The Participants can be grouped by MCU and then by conferences.

To change the display mode for the Participants pane:

>> On the *RMX Menu*, click **View > Group by MCU**.



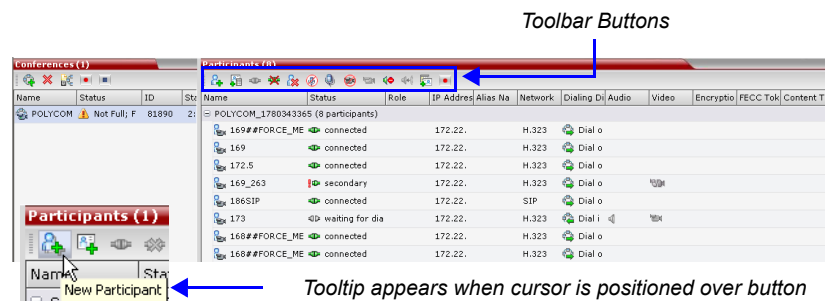
The *Participants* pane display changes accordingly.



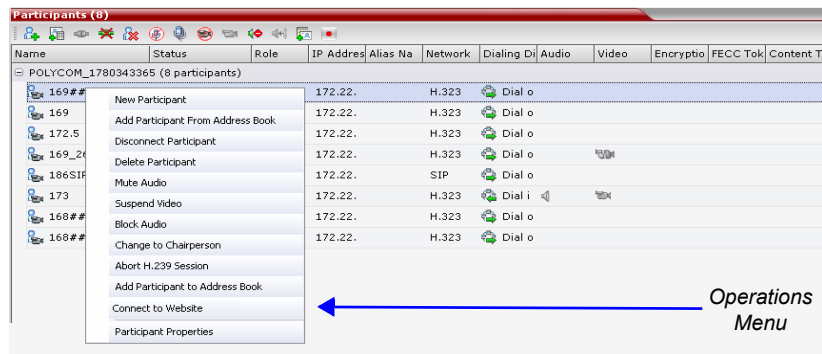
## Operation Selection

All monitoring and operations procedures performed during ongoing conferences can be performed by either of two methods:

- Using the buttons in the toolbars.



- **Right-clicking** anywhere in the *Conferences* or *Participants* pane and selecting an operation from the menu.

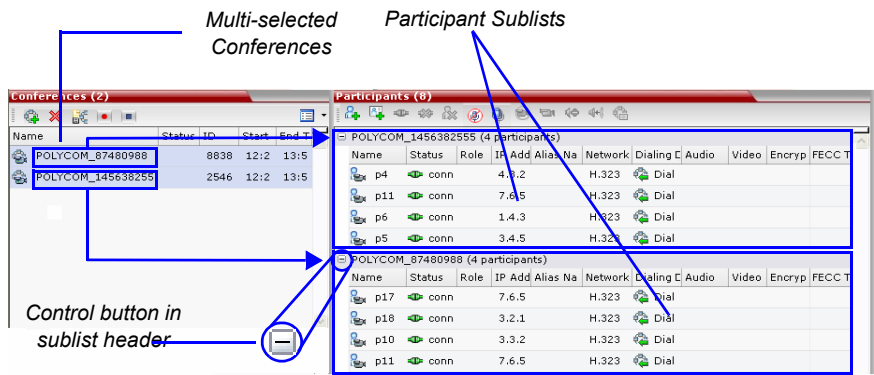


### Multi Selection

Using multiple selection, you can monitor and perform simultaneous operations on multiple participants in multiple conferences.

The selected conferences are displayed as sub-lists in the *Participants* list pane.

The sub-lists can be expanded and collapsed by clicking the **+** and **-** sublist control buttons that appear next to the conference name in the sublist headings.

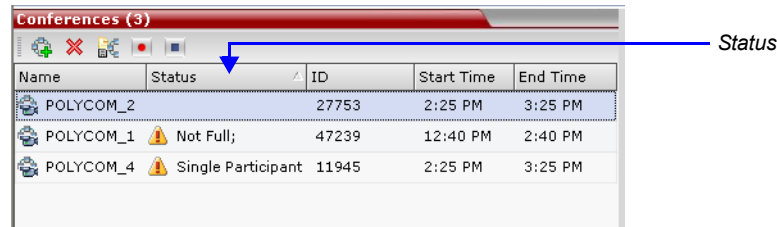


### Conference Level Monitoring

Conference level monitoring is available to the administrator and operator.

The *Conference List* pane displays information about ongoing conferences.





When *Conference Recording* is enabled in a conference's *Profile*, the *Conference Recording* buttons are enabled.



No status indicator display in the *Status* column means that the conference is running without problems.

One or more of the status indicators listed in Table 2-4 may appear in the *Status* column.

**Table 2-4** Conferences – Monitoring Information

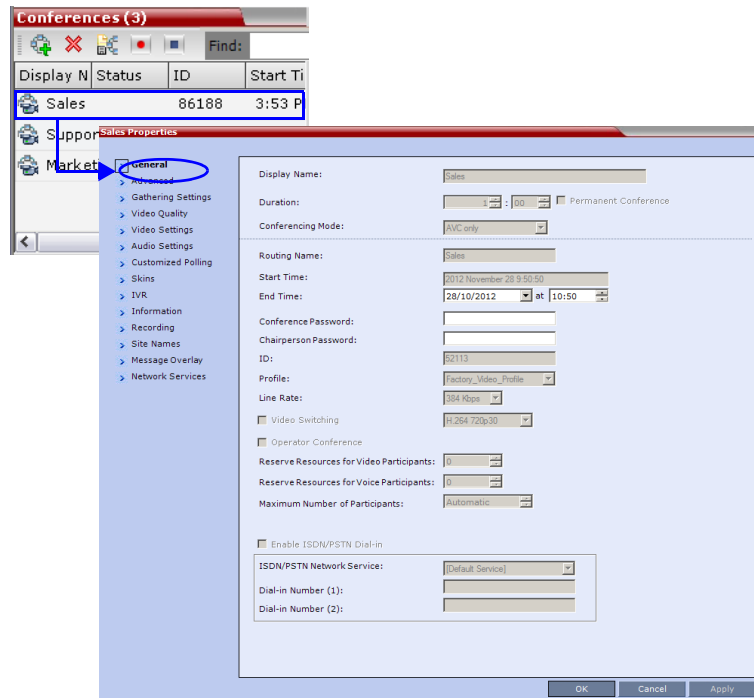
Field	Description
<i>Name</i>	Displays conference name and type of conference: <ul style="list-style-type: none"> <li>•  – Video Conference (including HD CP conferences).</li> <li>•  – High Definition Video Conference running in Video Switching mode.</li> <li>•  – The conference has been secured using the *71 DTMF code.</li> </ul>
<i>Status</i>	Displays the status of the ongoing conference. If there is no problem with the participant's connection no indication is displayed. If one of the following statuses occurs, the appropriate indication is displayed, preceded by a warning icon (  ). <ul style="list-style-type: none"> <li>• <b>Audio</b> – There is a problem with the participant's audio.</li> <li>• <b>Empty</b> – No participants are connected.</li> <li>• <b>Faulty Connection</b> – Participants are connected, but the connection is problematic.</li> <li>• <b>Not Full</b> – Not all the defined participants are connected.</li> <li>• <b>Partially Connected</b> – The connection process is not yet complete; the video channel has not been connected.</li> <li>• <b>Single Participant</b> – Only one participant is connected.</li> <li>• <b>Video</b> – There is a problem with the participant's video.</li> </ul>
<i>ID</i>	The Conference ID assigned to the conference.
<i>Start Time</i>	Conference start time.
<i>End Time</i>	The time the conference is expected to end.

Additional information about the conference can be viewed when accessing the conference properties.

**To monitor a conference:**

- >> In the *Conference List* pane, double click the name of the conference you wish to monitor or right-click the conference and then click **Conference Properties**.

The *Conference Properties* dialog box appears with the *General* tab open.



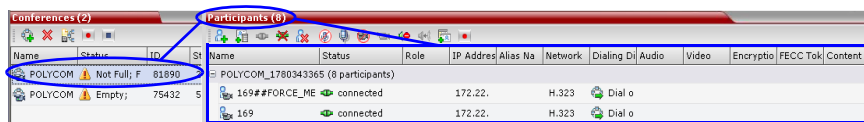
You can view all the conference’s properties but those that appear with a gray background cannot be modified.

For more information, see the *RealPresence Collaboration Server (RMX) 2000/4000 Administrator’s Guide*, "Conference Level Monitoring".

## Participant Level Monitoring



### Participant Connection Monitoring

When a conference is selected in the *Conference List*, details of its participants appear in the *List* pane.
















The following participant indicators and properties are displayed:









**Table 2-5** Participant Monitoring – Indicators and Properties

Column	Icon/Description
Name	Displays the name and type (icon) of the participant:
	 <b>Audio Participant</b> – Connected via IP phone or ISDN/PSTN.
	 <b>Video Participant</b> – Connected with audio and video channels.

**Table 2-5** Participant Monitoring – Indicators and Properties (Continued)

Column	Icon/Description	
<i>Status</i>	Displays the connection status (text and icon) of the participant. If there is no problem with the participant's connection no indication is displayed.	
		<b>Connected</b> – The participant is successfully connected to the conference.
		<b>Disconnected</b> – The participant is disconnected from the conference. This status applies only to defined participants.
		<b>Waiting for Dial-in</b> – The system is waiting for the defined participant to dial into the conference.
		<b>Partially Connected</b> – The connection process is not yet complete; the video channel has not been connected.
		<b>Faulty Connection</b> – The participant is connected, but problems occurred in the connection, such as synchronization loss.
		<b>Secondary Connection</b> – The endpoint's video channel cannot be connected to the conference and the participant is connected only via audio.
<i>Role</i>	Displays the participant's role or function in the conference:	
		<b>Chairperson</b> – The participant is defined as the conference chairperson. The chairperson can manage the conference using touch-tone signals (DTMF codes).
		<b>Lecturer</b> – The participant is defined as the conference Lecturer.
		<b>Lecturer and Chairperson</b> – The participant is defined as both the conference Lecturer and Chairperson.
		<b>Cascade Enabled Dial-out Participant</b> – A special participant functioning as a link in a cascaded conference.
		<b>Recording</b> – A special participant functioning as a Recording Link.
<i>IP Address/ Phone</i>	The IP participant's IP address or the ISDN/PSTN participant's phone number.	
<i>Alias Name</i>	The participant's Alias Name. The alias of an <i>RSS 2000 Recording System</i> if the participant is functioning as a recording link.	
<i>Network</i>	The participant's network connection type – H.323 or ISDN/PSTN.	
<i>Dialing Direction</i>		<b>Dial-in</b> – The participant dialed the conference.
		<b>Dial-out</b> – The MCU dialed the participant.

**Table 2-5** Participant Monitoring – Indicators and Properties (Continued)

Column	Icon/Description	
Audio	Displays the status of the participant's audio channel. If the participant's audio is connected and the channel is neither muted nor blocked, no indication is displayed.	
		<b>Muted</b> – Participant's audio channel is muted. The participant can still hear the conference.
		<b>Blocked</b> – Transmission of audio from the conference to the participant is blocked.
		<b>Muted and Blocked</b> - Audio channel is muted and blocked.
Video	Displays the status of the participant's video channel. If there is no problem with the participant's video connection and the channel is neither suspended nor secondary, no indication is displayed.	
		<b>Suspended</b> – Video transmission from the endpoint to the conference is suspended.
		<b>Secondary</b> – Participant is connected only through the audio channel due to problems with the video channel.
Encryption		Indicates that the endpoint is connected to the conference using encryption.
FECC Token		Participant is the holder of the FECC token and has Far End Camera Control capabilities. The FECC token can be allocated to only one participant at a time and remains un-allocated if no participant requests it.
Content Token		Participant is the holder of the Content token and has content sharing permission. The Content token can be allocated to only one participant at a time and remains un-allocated if no participant requests it. For more information, see the <i>RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide</i> , "H.239".

For more information, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*, "Participant Level Monitoring".

## Starting Monitoring / Stopping Monitoring

By default, all conferences running on connected RMXs are monitored.

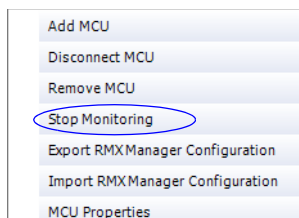
You can stop the automatic monitoring of conferences on a specific MCU in one of the following methods:

- By clearing the check box in the *Monitored* column in the *MCUs* pane.



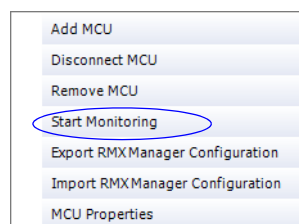
Display Name	IP Address	Status	Product T	Monitored	Voice	Video
172.22.186.45	172.22.186.45	Disconnect	RMX 40	<input checked="" type="checkbox"/>		
172.22.190.40	172.22.190.40	Normal	RMX 20	<input checked="" type="checkbox"/>	0/96	0/66

- Right-clicking the MCU icon and selecting **Stop Monitoring**.



The check box is cleared in the *Monitored* column.

To start monitoring again, click the check box in the *Monitored* column in the *MCUs* pane, or right-clicking the MCU icon and selecting **Start Monitoring**.



# Operations Performed During On Going Conferences

## Conference Level operations

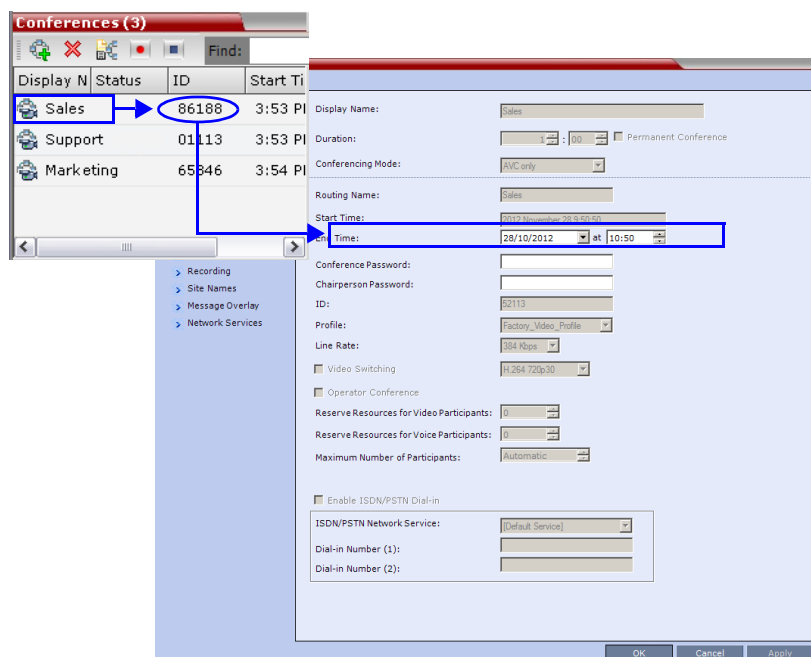
### Changing the Duration of a Conference

The duration of each conference is set when the new conference is created. The default duration of a conference is 1 hour. All conferences running on the RMX are automatically extended as long as there are participants connected to the conference.

A conference's *Duration* can be extended or shortened while it is running, by modifying its scheduled *End Time*.

**To extend or shorten a conference manually:**

- 1 In the *Conference List* pane, double-click the conference **Name**.
- 2 In the *General* tab, modify the *End Time* fields and click **OK**.

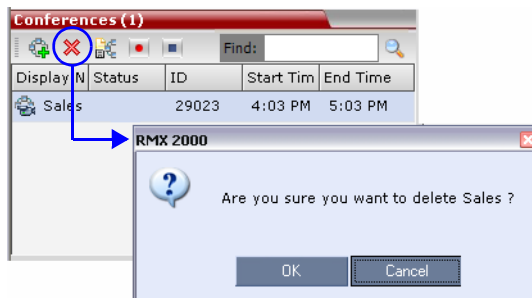


The *End Time* is changed and the *Duration* field is updated.

**To terminate a conference manually:**

- 1 In the *Conferences* list, select the conference you wish to delete and click the **Delete Conference (X)** button.

You are prompted for confirmation.



- 2 Click **OK** to terminate the conference.

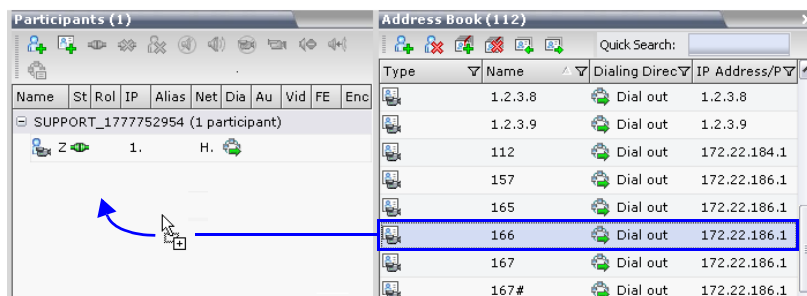
**Adding Participants from the Address Book**

Once the conference has started, you can add participants to a conference directly from the *Participants Address Book* without having to use the *New Conference - Participants* tab.

**To drag & drop participants into the Participants List:**

- 1 Open the *Address Book*.
- 2 Select, drag and drop the participant that you wish to add to the conference directly from the *Participant Address Book* into the *Participant List*.


Standard Windows multiple selection techniques can be used in this procedure.

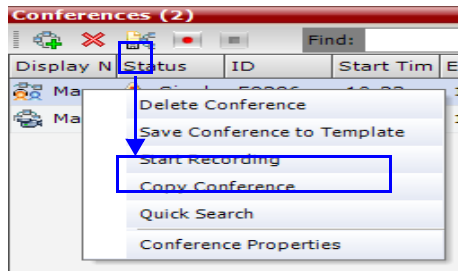
**Saving an Ongoing Conference as a Template**

Any conference that is ongoing can be saved as a template.

**To save an ongoing conference as a template:**

- 1 In the *Conferences List*, select the conference you want to save as a Template.

- 2 Click the **Save Conference** (  ) button.  
or  
Right-click and select **Save Conference to Template**.



The conference is saved to a template whose name is taken from the ongoing conference *Display Name*.

## Changing the Video Layout of a Conference

While the conference is running, you can change the video layout and select one of 24 video layouts supported by the RMX.

Video Layout selection can be done in two levels:

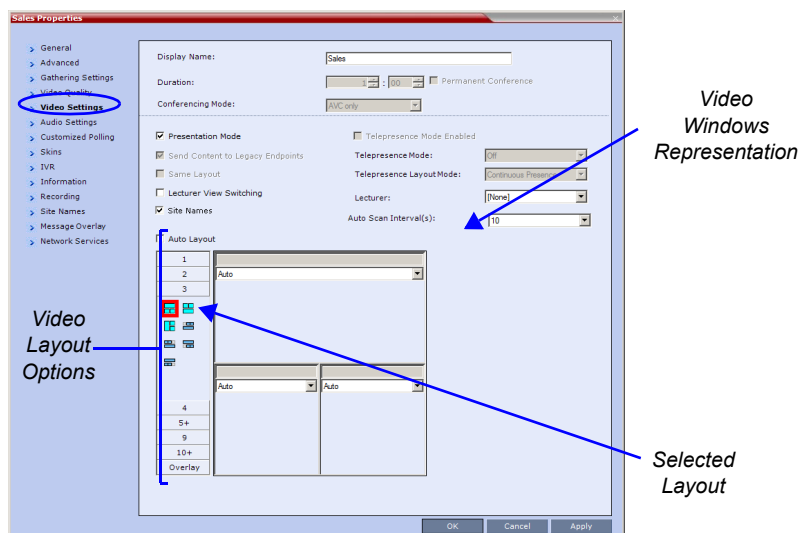
- **Conference Level** – Applies to all conference participants. All participants have the same video layout.
- **Participant Level** – The participant’s video layout is changed. All other conference participants’ video layouts are not affected.

The initial video layout is selected for the conference in the *Conference Profile*.

Participant level video layout selection overrides conference level video layout settings.

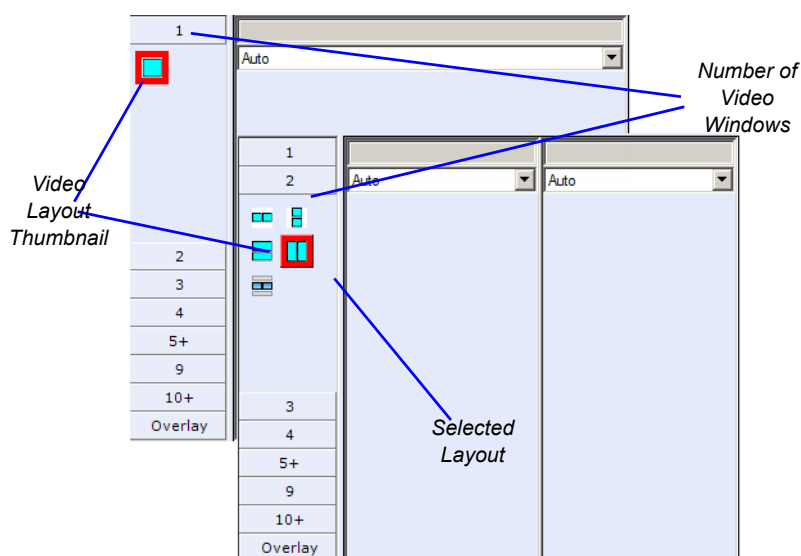
### To change the video layout of a conference:

- 1 In the *Conference Properties* dialog box, select **Video Settings**.



- 2 If **Auto Layout** check box is selected, clear it.

- From the *Video Layout* options, select the *Number of Windows* to display and the *Video Layout* thumbnail required and click **OK**.



## Video Forcing

Users with Administrator or Operator permission can select which participant appears in each of the video layout windows using *Video Forcing*. When a participant is forced to a layout window, switching between participants is suspended for that window and only the assigned participant is viewed. Video Forcing works on Conference Level or Participant Level:

- **Conference Level** – When forcing a participant to a window, all conference participants will see that participant in the selected window.
- **Participant Level** – When forcing a participant to a window, only the participant's video layout display is affected. All other participants see the conference layout.

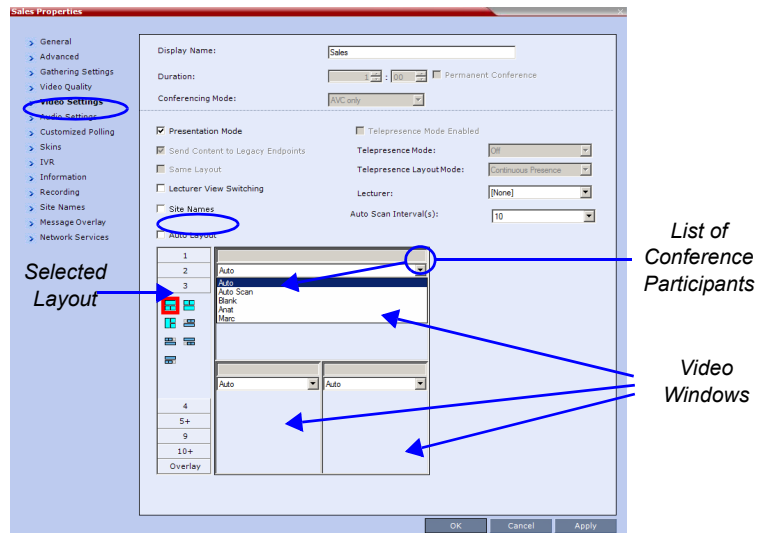
### Video Forcing Guidelines:

- A participant cannot appear in two or more windows at the same time.
- Participant level video forcing overrides conference level video forcing.
- A participant can view him/herself in a layout window, by selecting the *Same Layout* option.
- When different size video windows are used in video layouts such as 1+2, 1+3, 1+4, etc., a participant can only be forced, in *Personal Layout*, to a video window of the same size as that selected for him/her in *Conference Layout*.
- When changing the Video Layout at the conference level, the video forcing settings are not applied to a new layout, and switching between participants is audio-activated. The video forcing settings are saved and applied the next time the layout is selected.
- Windows that are not assigned any participant display the current speaker and last speakers.

### To video force a participant to a window:

- 1 In the *Conference Properties* dialog box, select the **Video Settings** tab.
- 2 If **Auto Layout** check box is selected, clear it.

- 3 Select the required video layout.
- 4 In the window to which you want to force a participant, select the participant's name from the list of conference participants.



- 5 Repeat step 3 to force participants to other windows.
- 6 Click **OK**.

**To cancel Video Forcing for a window:**

- 1 In the *Conference Properties* dialog box, select the **Video Settings** tab.
- 2 In the video layout window, in the *Participants* list, select **Auto**.
- 3 Click **OK**.

Switching between participants is renewed and is audio activated.

**Enabling and Disabling Video Clarity™**

The user can enable or disable Video Clarity™ during an ongoing conference.



















**To enable or disable Video Clarity:**

- 1 In the *Conference List* pane, double-click the name of the conference for which you want to enable or disable *Video Clarity*  
or  
right-click the conference name and then click **Conference Properties**.
- 2 Click the **Video Settings** tab.
- 3 Select or clear the **Video Clarity** check box as required.
- 4 Click **OK**.

## Participant Level Operations

Participant Level Operations enable you to modify and control the connections and statuses of participants in ongoing conferences, as described in Table 2-6.

**Table 2-6** Participant Level Operations

Menu Option	Button	Description
<i>New Participant</i>		Define a new participant. For more information about the <i>New Participant</i> dialog box tab, see Table 2-2 on page 2-21.
<i>Add Participant From Address Book</i>		Open the <i>Address Book</i> to select the participant for the conference. For more information about the <i>Address Book</i> , see the <i>RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide</i> , "Address Book".
<i>Connect Participant</i>		Connect a disconnected defined dial-out participant to the conference.
<i>Disconnect Participant</i>		Disconnect the participant from the conference.
<i>Delete Participant</i>		Delete the selected participants from the conference.
<i>Mute Audio</i>		Mute the audio transmission from the participant to the conference. The <i>Audio Muted</i> indicator appears in the <i>Participants List</i> and the <i>Unmute Audio</i> button (  ) becomes active.
<i>Unmute Audio</i>		Resume the participant's audio transmission to the conference. The <i>Mute Audio</i> button (  ) becomes active.
<i>Suspend Video</i>		Suspend the video transmission from the participant to the conference. The suppressed participant's video is not transmitted to the conference but the participant still receives conference video. The <i>Suspend Video</i> indicator appears in the <i>Participants List</i> and the <i>Resume Video</i> button (  ) becomes active.
<i>Resume Video</i>		Resume the participant's video transmission to the conference. The <i>Suspend Video</i> button becomes active (  )
<i>Block Audio</i>		Block the audio transmission from the conference to the participant. When blocked, the participant can still be heard by the conference. The <i>Audio Blocked</i> indicator appears in the <i>Participants List</i> and the <i>Unblock Audio</i> button (  ) becomes active.
<i>Unblock Audio</i>		Resume the audio transmission from the conference to the participant. The <i>Block Audio</i> button (  ) becomes active.
<i>Add Participant to Address Book</i>		Add selected participant's details to the <i>Participant Address Book</i> .

**Table 2-6** *Participant Level Operations (Continued)*

Menu Option	Button	Description
<i>Abort H.239 Session</i>		To withdraw the Content Token from the participant back to the MCU for re-assignment.
<i>Change to Chairperson</i>		Define the selected participant as the conference leader/chairperson.
<i>Change to Regular Participant</i>		Define the chairperson as a regular participant without chairperson privileges.
<i>Connect to Website</i>		Connect directly to the internal website of the participant's endpoint to perform administrative, configuration and troubleshooting activities.
<i>AGC (Auto Gain Control)</i>		Enable AGC for the participant with weak audio signal during ongoing conferences. <b>Note:</b> Enabling AGC may result in amplification of background noise.
<i>Participant Properties</i>		To view all <i>Participant Properties</i> . For more information, see the <i>RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide</i> , "Participant Level Monitoring".

## Personal Layout Control with the RMX Manager

RMX users can use the *RMX Manager* to change the *Video Layouts* of individual participants and force participants to its windows without affecting the *Video Layouts* of other participants.

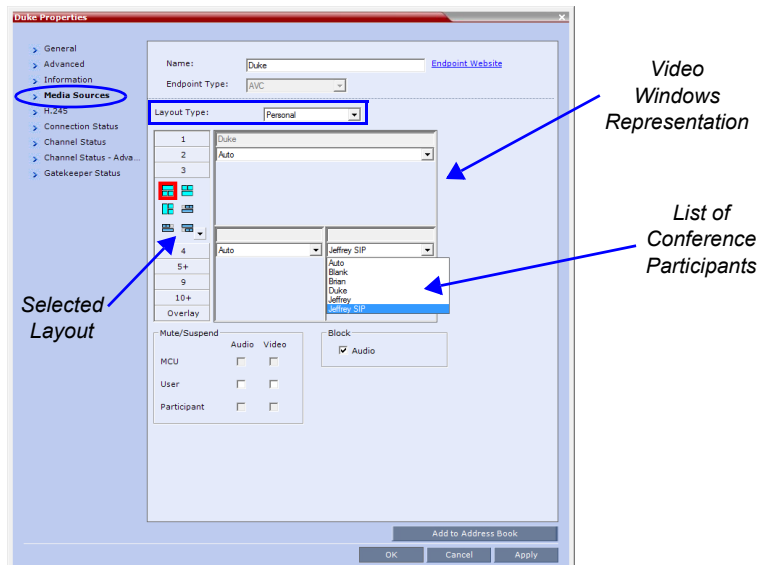
### To change a participant's Video Layout and Video Forcing:

- 1 In the *Participants* list, double click the participant or right-click the participant and then click **Participant Properties**.

The *Participant Properties – Media Sources* dialog box opens.



- 2 In the *Layout Type* list, select **Personal**.



- 3 Select the number of Video Windows.
- 4 Select the required Video Layout.
- 5 To video force participants to windows in the selected video layout, in the window to which you want to force a participant, select the name of the participant to force from the list of conference participants.
- 6 Repeat step 5 to force participants to other windows.
- 7 Click **OK**.

**To cancel the Personal Video Layout selection and return to the conference layout:**

- 1 In the *Participant Properties* dialog box, select the **Media Sources** tab.
- 2 In the *Layout Type* list, select **Conference**.
- 3 Click **OK**.

The participant will now see the conference video layout with its forced participants.

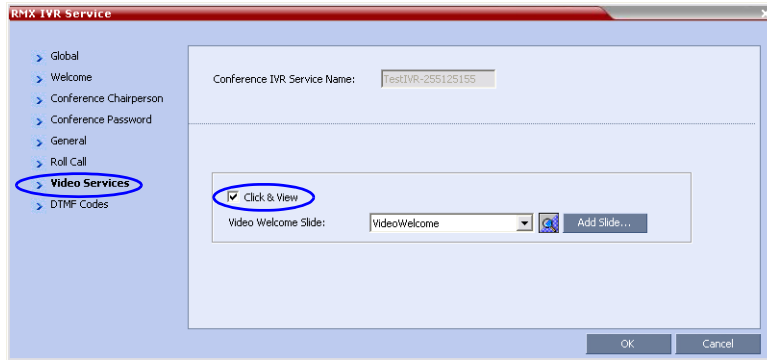
**To cancel the Personal Video Forcing for a window without returning to the conference layout:**

- 1 In the *Participant Properties – Media Sources* dialog box, in the video layout window, select **Auto** in the *Participants* list.
- 2 Click **OK**.

Switching between participants is renewed and is audio activated.

## Personal Layout Selection with *Click&View*

With the **Click&View** application, participants can change their *Personal Layouts* via *DTMF* codes entered from their endpoints. This option is available only if the **Click&View** option is selected in the Conference *IVR Service*.



### To change Personal Layout with Click&View:

- 1 **Enable Click&View** – on the endpoint’s keypad, enter **\* \* \***.

The *Click&View* application is displayed on the screen.



When using a *Polycom VSX* endpoint, an additional **\* \*** must be entered to enable the remote DTMF keypad. The full *Click&View* entry sequence is: **\* \* \*, \* \* \*, \* \* \***.

The Personal Layout keypad options menu is displayed on the video screen.



- 2 On the endpoint’s remote keypad, press the number corresponding to the number of video squares you wish to select.

For example, if you want a four-square video layout, press **\* 4 \***.

The video window layout of your screen changes to the first four-window layout as follows:



Repeated presses of the **4** key, within eight seconds, cycles through the following series of four-square layout options:



In any multi-square layout, pressing **#** forces the current speaker to the top left window.

In full view, pressing **#** forces the next participant to full view.

In any video layout, pressing **0** reverts to the conference layout.

The following table summarizes the Video Layout options available via *Click&View*.

**Table 2-7** Video Layout Options

DTMF Code	Layout Options
1	
2	
3	
4	
5	
6	
8	
9	

## Conference Control Using DTMF Codes

Participants and chairpersons can manage their connection to ongoing conferences from their endpoints, using touch-tone signals (DTMF codes) from their endpoints. Table 3-9 lists the DTMF Codes that can be used.

Chairpersons can also control an ongoing conference using DTMF codes.

Permissions for DTMF actions to be performed by all conference participants or by chairperson only are configured in the *Conference IVR Service* assigned to the conference.

For more information, see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide*, "Defining a New Conference IVR Service".

To use the DTMF codes to control the conference, the DTMF input must be first enabled on the endpoint remote control (for example, entering #).

**Table 2-8** Conference IVR Service Properties - DTMF Codes

Operation	DTMF String	Permission
Mute My Line	*6	Everyone
Unmute My Line	#6	Everyone
Increase Broadcast Volume	*9	Everyone
Decrease Broadcast Volume	#9	Everyone
Mute All Except Me	*5	Chairperson
Cancel Mute All Except Me	#5	Chairperson
Change Password	*77	Chairperson
Mute Incoming Participants	*86	Chairperson
Unmute Incoming Participants	#86	Chairperson
Play Help Menu	*83	Everyone
Enable Roll Call	*32	Chairperson
Disable Roll Call	#32	Chairperson
Roll Call Review Names	*33	Chairperson
Roll Call Stop Review Names	#33	Chairperson
Terminate Conference	*87	Chairperson
Start Click&View	**	Everyone
Change To Chairperson	*78	Everyone
Increase Listening Volume	*76	Everyone
Decrease Listening Volume	#76	Everyone
Override Mute All	Configurable	EveryoneAll
Secure Conference	*71	Chairperson
Unsecure Conference	#71	Chairperson
Show Participants	*88	Everyone


## Modifying the MCU Properties

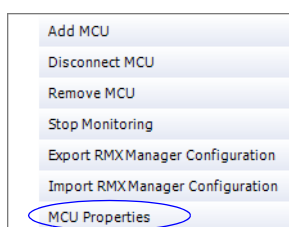
You can view the currently defined MCU settings, and modify them when required, for example, change the MCU name, IP address or Secured mode.

Use this procedure to add the *Username* and *Password* to the properties of the MCU that was automatically added to the MCU list when installing the *RMX Manager*. This enables automatic login when connecting the MCU to the *RMX Manager*.

You can modify the MCU properties when the MCU is connected or disconnected.

### To view and/or modify the MCU Properties:

- 1 Use one of the following methods:
  - a Select the MCU to disconnect and click the **MCU Properties**  button.
  - b Right-click the MCU icon and then click **MCU Properties**.




The *MCU Properties* dialog box opens.

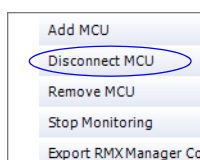
- 2 Define/modify the required parameters. For details, see “*MCU Properties*” on page 13.
- 3 Click **OK**.

## Disconnecting an MCU

An MCU can be disconnected from the *RMX Manager*, without removing it from the *MCUs* list.

### To disconnect an MCU:

- 1 Use one of the following methods:
  - a Select the MCU to disconnect and click the **Disconnect MCU**  button.
  - b Right-click the MCU icon and then click **Disconnect MCU**.




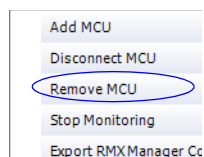
The MCU icon changes to disconnected and any ongoing conference running on that MCU will not be monitored in this *RMX Manager*; they are removed from the *Conferences* pane. This MCU can still be monitored and controlled by other users.

## Removing an MCU from the MCUs Pane

An MCU can be removed from the *RMX Manager*. This function should be used if the MCU hardware was disconnected and removed from the network.

### To Remove an MCU from the list:

- 1 Use one of the following methods:
  - a Select the MCU to disconnect and click the **Delete**  button.
  - b Right-click the MCU icon and then click **Remove MCU**.



A confirmation message is displayed.

- 2 Click **OK** to confirm or **Cancel** to abort the operation.  
The MCU icon is removed from the MCUs pane.

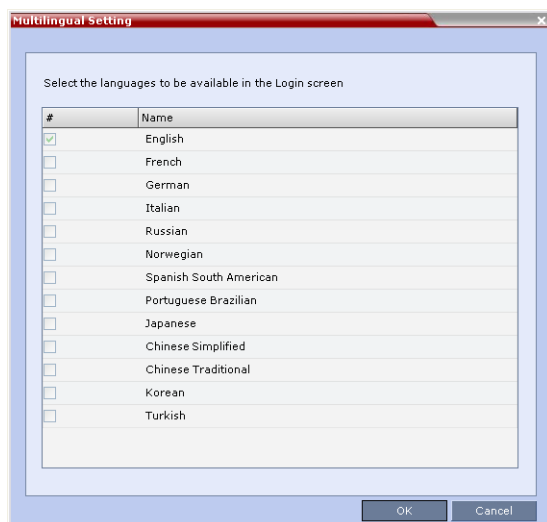
## Changing the RMX Manager Language

You can change the language of the *RMX Manager* menus and dialog boxes. Only one language can be selected at a time and the *RMX Manager* application must be restarted after changing the display language.

### To select a language:

- 1 On the *RMX Manager* menu, click **Setup > Customize Display Settings > Multilingual Settings**.

The *Multilingual Settings* dialog box opens, displaying the current language selection.



- 2 Click the check box of the required language. Only one language can be selected.
- 3 Click **OK**.

- Restart the *RMX Manager* application to implement the language change.

## Import/Export RMX Manager Configuration

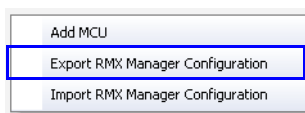
The *RMX Manager* configuration that includes the MCU list and the multilingual selection can be save to any workstation/PC on the network and imported to any *Multi-RMX Manager* installed in the network. This enables the creation of the MCUs list once and distributing it to all *RMX Manager* installations on the network.

In addition, when upgrading to a previous version, the MCU list is deleted, and can be imported after upgrade.

The exported file is save in XML format and can be edited in any text editor that can open XML files.

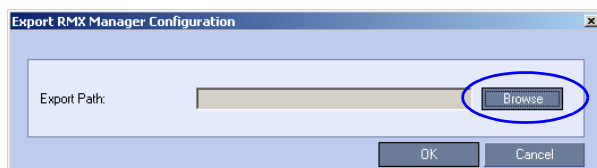
### To Export the *RMX Manager* Configuration:

- In the *Multi-RMX Manager*, click the **Export RMX Manager Configuration**  button in the toolbar, or right-click anywhere in the MCUs pane and then click **Export RMX Manager Configuration**.



The *Export RMX Manager Configuration* dialog box opens.


- Click the **Browse** button to select the location of the save file, or enter the required path in the *Export Path* box.

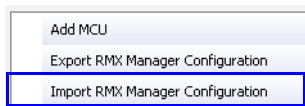


The selected file path is displayed in the *Export Path* box.

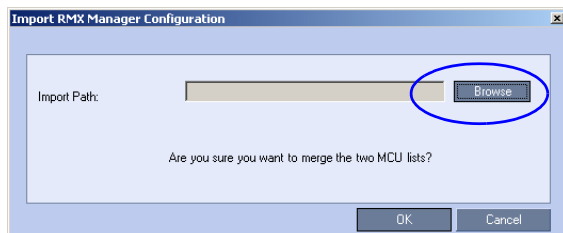
- Click **OK** to export the *RMX Manager* configuration.

### To Import the *RMX Manager* Configuration:

- In the *Multi-RMX Manager*, click the **Import RMX Manager Configuration**  button in the toolbar, or right-click anywhere in the MCUs pane and then click **Import RMX Manager Configuration**.

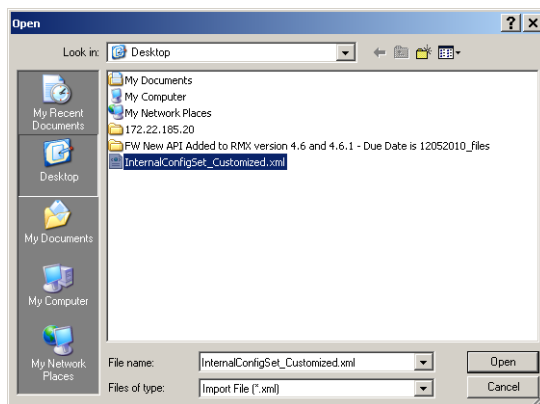


The *Import RMX Manager Configuration* dialog box opens.



- 2 Click the **Browse** button to select the saved file, or enter the required path in the *Export Path* box.

The *Open* dialog box is displayed.



- 3 Select the XML file previously saved, and click the **Open** button.  
The selected file path is displayed in the *Import Path* box.
- 4 Click OK to import the file.



# Restoring the RMX Using the USB Port



Do **not** insert a *USB* device into the *RMX*'s *USB* port unless it is your intention to disable *Secured Mode* or perform a *Comprehensive Restore to Factory Defaults*.

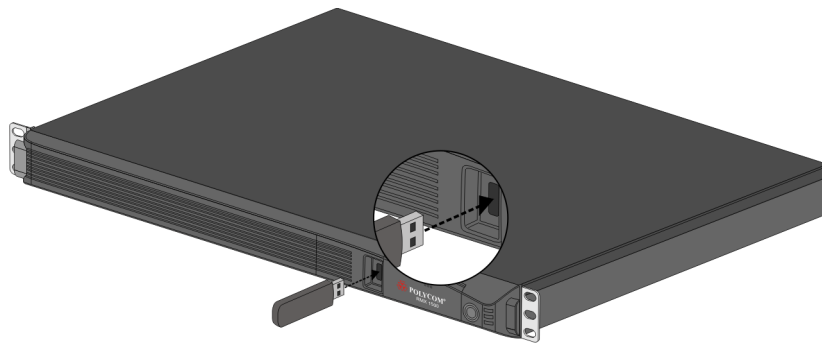
*Restoring the RMX Using the USB Port* can be used to set the *RMX* back to its factory default settings, if for any combination of factors the system becomes unstable or unmanageable. There are also administrative operations that cannot be performed on a *secured* or *ultra secured* system that require the *RMX* to be set back to its default (normal) security mode.



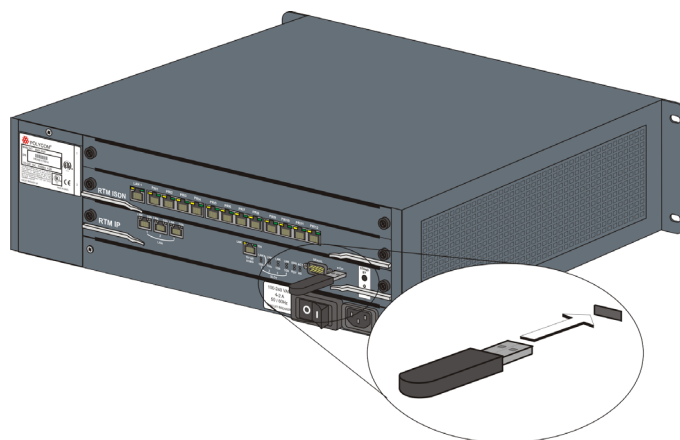
Do **not** use any *USB* ports other than the ones indicated in the following diagrams.

When performing operations using a *USB* device, the following *USB* ports are used:

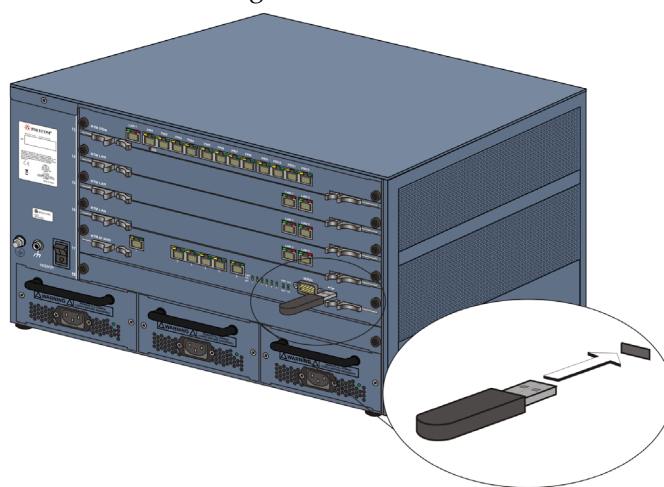
- *RMX 1500* - left most *USB* port on the **front panel**.



- *RMX 2000* - at the bottom right corner of the *RTM IP* card on the **back panel**.



- *RMX 4000* - at the bottom right corner of the *RTM IP 4000* card on the **back panel**.



## Recovery Operations Performed Using a USB Device

The RMX has two recovery options:

- *Comprehensive Restore to Factory Defaults*

Inserting a *USB* key with the following **two** text files will restore the *RMX* to factory defaults:

- *RestoreToFactoryDefault.txt*
- *lan.cfg*



Do **not** insert a *USB* key containing a file named *RestoreToFactoryDefault.txt* if the *USB* key does not also contain a *lan.cfg* file.

- *Emergency CRL (Certificate Revocation List) Update*

Inserting a *USB* key or *USB* mouse and restarting the *RMX* will:

- Change the *RMX* from *HTTPS* mode to *HTTP* mode.
- Disable *PKI Client Validation* so that the *RMX*'s configuration or *CRLs* (or both) can be updated.

## Comprehensive Restore to Factory Defaults

Inserting a *USB* key containing a file named *RestoreToFactoryDefault.txt* **and** a *lan.cfg* file will cause the *RMX* to exit *Secure Mode* **and** perform a *Comprehensive Restore to Factory Defaults*.

The *Comprehensive Restore to Factory Defaults* deletes the following files:

- CDR
- Address Book
- Log Files
- Faults
- Dump Files
- Notes

In addition all the conferencing entities are deleted:

- Entry Queues
- Profiles
- Meeting Rooms
- IVR Services
- Default Network IP Service
- Log Files
- CFS license information
- Management Network Service

The *RMX* is restored to the settings it had when shipped from the factory. The *Product Activation Key* is required to re-configure the *Management Network Service* during the *First Entry Configuration*.

### Procedure Summary for Performing a Comprehensive Restore to Factory Defaults:

#### To perform a Comprehensive Restore to Factory Defaults:

Restoring the *RMX* to *Factory Defaults* consists of the following steps:

**Step 1:** Backup Configuration Files. These files will be used to restore the system in **Step 10**.

**Step 2:** Configure a workstation for *Direct Connection*.

**Step 3:** Connect to the *RMX* and the workstation using a *LAN* cable.

**Step 4:** Into the *RMX*'s *USB* port, insert a *USB* key containing a file named *RestoreToFactoryDefault.txt* and also containing a *lan.cfg* file.



Do **not** insert a *USB* key containing a file named *RestoreToFactoryDefault.txt* if the *USB* key does not also contain a *lan.cfg* file.

**Step 5:** Restart the *RMX*.

**Step 6:** If you are **not** using an *RMX4000* continue with **Step 9**.

**Step 7:** Into the *RMX*'s *USB* port, insert a *USB* key containing a file named *lan.cfg* file only.

**Step 8:** Restart the *RMX*.

**Step 9:** From the workstation, connect to the *RMX*'s *Alternate Management Network*.

**Step 10:** Apply the *Product Activation Key*.

**Step 11:** Unplug the *USB* key.

**Step 12:** Restart the *RMX*.

**Step 13:** Restore the *System Configuration* from the backup by applying the backup files created in procedure **Step 1**.

**Step 14:** Restart the *RMX*. (If the *RMX* is unresponsive after these procedures a further restart may be necessary.)

**Step 15:** Enable *Secured Communication* and re-apply the *Certification* procedures as set out in "Procedure 6: Enable Secured Communication" on page 1-58.

## Detailed Procedure for Performing a Comprehensive Restore to Factory Defaults:

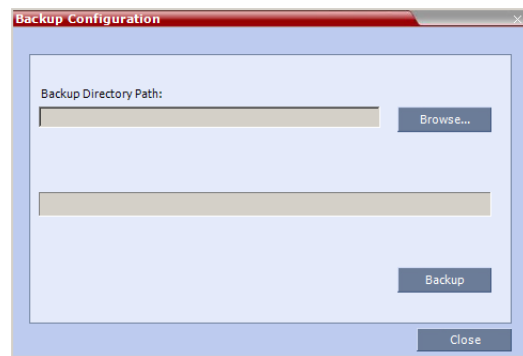
### Step 1: Backup Configuration Files

The *Software Management* menu is used to backup and restore the *RMX*'s configuration files and to download MCU software.

To backup configuration files:

- a On the *Collaboration Server* menu, click **Administration > Software Management > Backup Configuration**.

The *Backup Configuration* dialog box opens.



- b **Browse** to the *Backup Directory Path* and then click **Backup**.

### Step 2: Configure a Workstation for Direct Connection

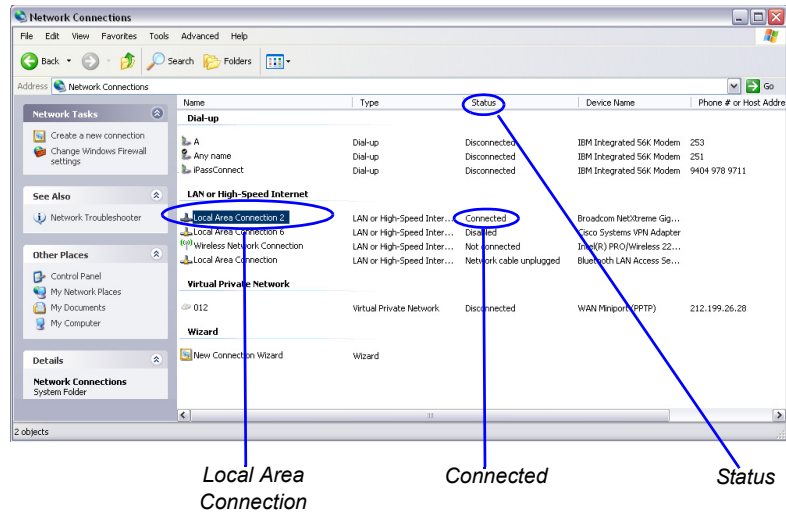
The following procedures show how to modify the workstation's networking parameters using the *Windows New Connection Wizard*.

For non-Windows operating systems an equivalent procedure must be performed by the system administrator.

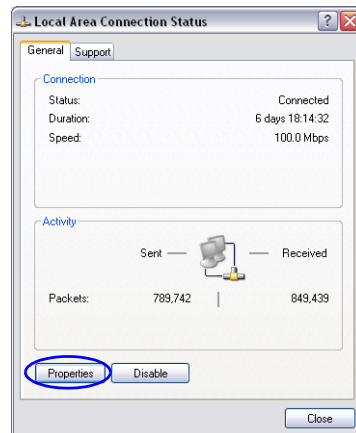
Before connecting directly, you must modify the *IP Address*, *Subnet Mask* and *Default Gateway* settings of the workstation to be compatible with the *Collaboration Server's Alternate Management Network*.

- a On the *Windows Start* menu, select **Settings > Network Connections**.

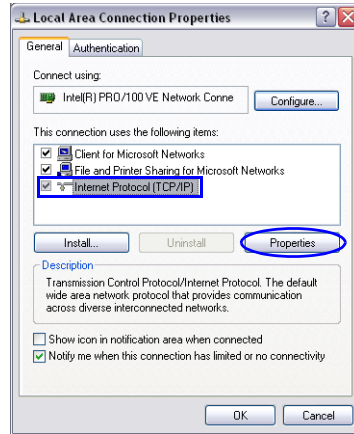
- b In the *Network Connections* window, double-click the **Local Area Connection** that has *Connected* status.



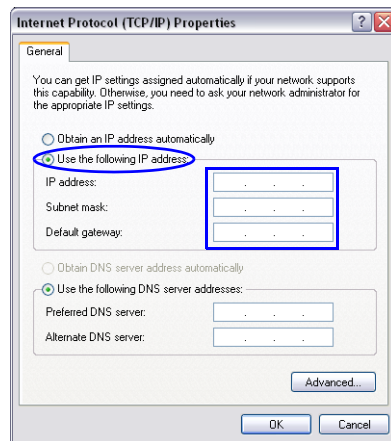
- c In the *Local Area Connection Status* dialog box, click the **Properties** button.



- d In the *Local Area Connection Properties* dialog box, select **Internet Protocol [TCP/IP] > Properties**.



- e In the *Internet Protocol (TCP/IP) Properties* dialog box, select **Use the following IP address**.
- f Enter the *IP address*, *Subnet mask* and *Default gateway* for the workstation.



The workstation’s IP address should be in the same network neighborhood as the *RMX’s Control Unit* IP address.

**Example:** *IP address* – near **169.254.192.nn**



None of the reserved IP addresses listed in *Table 3-1* should be used for the *IP Address*.

The addresses needed for connection to the Collaboration Server’s *Alternate Management Network* are listed in *Table 3-1*.

**Table 3-1** *Reserved IP Addresses*

Network Entity	Alternate Network IP Address
<i>Control Unit IP Address</i>	169.254.192.10

**Table 3-1** *Reserved IP Addresses*

<b>Network Entity</b>	<b>Alternate Network IP Address</b>
<i>Control Unit Subnet Mask</i>	255.255.240.0
<i>Default Router IP Address</i>	169.254.192.1
<i>Shelf Management IP Address</i>	169.254.192.16
<i>Shelf Management Subnet Mask</i>	255.255.240.0
<i>Shelf Management Default Gateway</i>	169.254.192.1

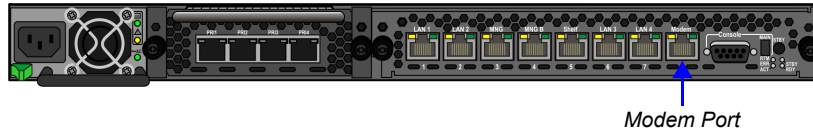
**g** Click the **OK** button.

### Step 3: Connect the RMX to the Workstation

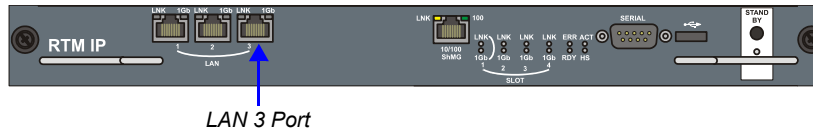
The *Alternate Management Network* enables direct access to the RMX for support purposes. The *Alternate Management Network* cannot be configured and operates according to factory defaults.

Access to the *Alternate Management Network* is via a cable connected to a workstation. The *Alternate Management Network* is accessible only via the LAN 3 port on the RMX 2000, the Modem port on the RMX 1500 and LAN 1 port on the RMX 4000.

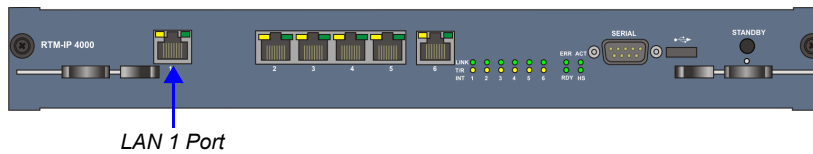
#### RMX 1500



#### RMX 2000



#### RMX 4000



>> Connect the cable between the RMX port and the LAN port configured on the workstation.

### Step 4: Insert a USB key containing a file named RestoreToFactoryDefault.txt and a lan.cfg file into the USB port of the RMX

The USB port locations for RMX 1500/2000/4000 are shown in "There are also administrative operations that cannot be performed on a secured or ultra secured system that require the RMX to be set back to its default (normal) security mode." on page 3-1.

**Step 5: Power the RMX Off and then On.**

**Step 6: If you are not using an RMX 4000 continue with Step 9.**

**Step 7: Into the RMX's USB port, insert a USB key containing a file named lan.cfg file only.**

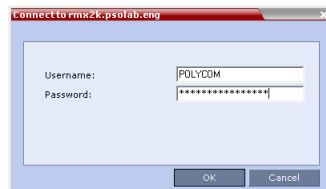
**Step 8: Restart the RMX.**



**Step 9: Connect to the Alternate Management Network**

- a Start the *RMX Manager*.
- b In the *MCU's* list, either modify the current *MCU IP* address to the *Alternate Management Network's IP* address, **169.254.192.10** or add the *Alternate Management Network's IP* address as a that of an additional *MCU*.
- c Login to the *RMX*.

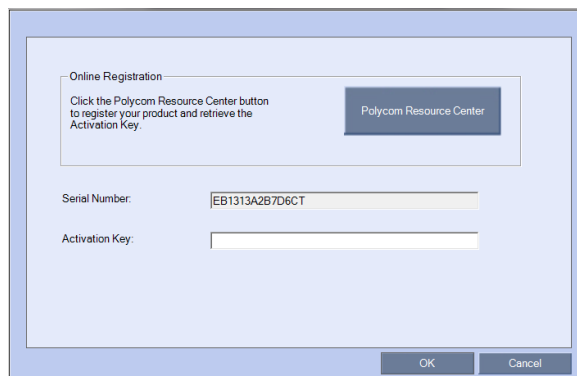
The *Username / Password* dialog box is displayed.



- d Enter the default *Username* (**POLYCOM**) and *Password* (**POLYCOM**) and click **OK**.

**Step 10: Apply the Product Activation Key.**

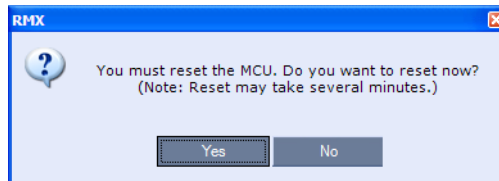
The *Product Activation* dialog box is displayed with the serial number filled in.



- a In the *Activation Key* field, enter or **paste** the *Product Activation Key* obtained earlier.
- b Click **OK**.

If you do not have an *Activation Key*, click **Polycom Resource Center** to access the *Service & Support* page of the Polycom website.

The system prompts with a restart dialog box:

**Step 11: Unplug the USB device.**

>> Remove the *USB* device from the *USB* port of the *RMX*.

**Step 12: Restart the RMX.**

>> In the restart dialog box, click **Yes**.

**Step 13: Restore the System Configuration From the Backup.****To restore configuration files:**

- a** On the *RMX* menu, click **Administration > Software Management > Restore Configuration**.
- b** Browse to the *Restore Directory Path* where the backed up configuration files are stored.
- c** Click the **Restore** button.
- d** When the **Restore** is complete, restart the *RMX* (**Step 14**).  
*RMX* system settings, with the exception of *User* data, are restored.
- e** Restore *User* data by repeating **Step a** to **Step d** of this procedure.

**Step 14: Restart the RMX.**

**Step 15:** Enable *Secured Communication* and re-apply the *Certification* procedures as set out in "*Procedure 6: Enable Secured Communication*" on page **1-58**.

## Emergency CRL (Certificate Revocation List) Update

If CRLs are used, administrators maintaining *RMX* systems are required to perform an update of the CRLs used on the systems within the validity period of the current CRLs. Should the current CRLs expire; the system will not allow administrators to login and perform administrative tasks using the *RMX Manager*.

The *Emergency CRL Update* procedure disables client certificate validation enabling an administrator to access the system and install an updated CRL file without having to perform a full system rebuild.



This procedure must only be performed on a secured network as the system must disable the client certificate validation process resulting in management traffic being sent over the network without the use of SSL encryption.



The *RMX* must be powered on before starting this procedure.

**To perform an Emergency CRL Update procedure:**

**Step 1:** Download and save the updated CRL files from the CA Server.

**Step 2:** Disable *Secured Communications Mode*.

**Step 3:** Open the *Certification Repository*.

**Step 4:** Update the CRL files.

**Step 5:** Update the *Repository*.

**Step 6:** Re-connect to the *RMX*.

**Step 7:** Re-enable *Secured Communications Mode*.

**Step 1: Download and save the updated CRL files from the CA Server.**

These files are saved on the workstation.



The *RMX* supports the use of *PEM* and *DER* formats. Take note of the format you download as you will need to make a selection later in this process when uploading the new CRL files.

**Step 2: Disable Secure Communications mode**

- a** Connect a *USB* keyboard or mouse to the *USB* port of RMX.

The *USB* port locations for RMX 1500/2000/4000 are shown in "There are also administrative operations that cannot be performed on a secured or ultra secured system that require the RMX to be set back to its default (normal) security mode." on page **3-1**.

- b** Power the RMX **Off** and then **On** using the power switch and allow the RMX to complete its startup.

System restart can take 5 - 10 minutes, depending on the RMX's configuration.

Using the *RMX Manager*:

- c** In the *MCUs* list, select the RMX to be updated.  
**d** In *MCU Properties*, change the *Port* number from **443** to **80**.  
**e** Click **OK**.  
**f** In the *MCUs* list, select the RMX to be updated.  
**g** Right-click in the *MCUs* list entry and select **Connect**.  
**h** Click **Accept** to accept the warning banner.  
**i** Enter an administrator *Username* and *Password*.  
**j** Click **OK**.

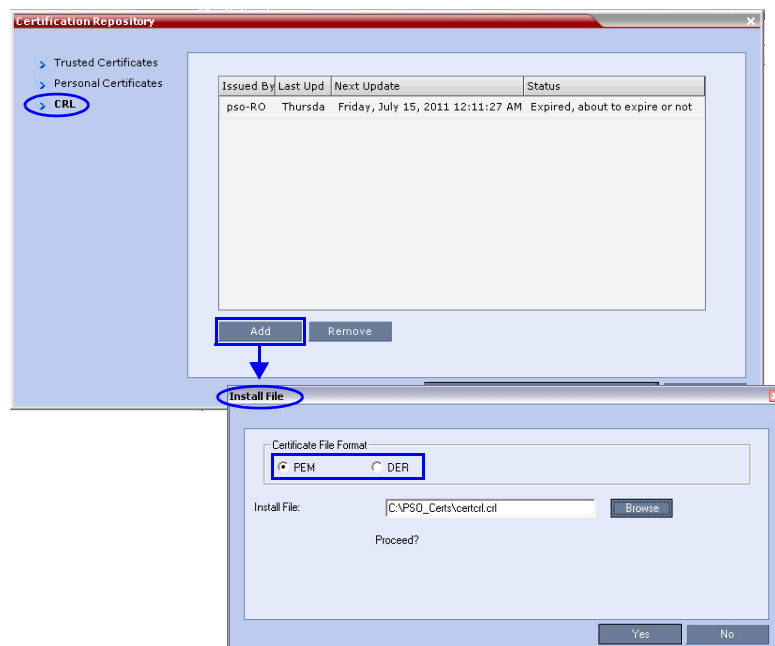
**Step 3: Open the Certification Repository.**

>> On the RMX menu, click **Setup > RMX Secured Communication > Certification Repository**.

**Step 4: Update the CRL files.**

In the *Certification Repository*:

- a** Click the **CRL** tab.  
**b** Click **Add**.



- c In the *Install File* dialog box, select the **DER** or **PEM** format depending on which file format was chosen in *Step 1* of this procedure.
- d Click the **Browse** button to navigate to the folder on the workstation where you saved the *CRL* files in *Step 1* of this procedure.
- e Select the *CRL* file that you want to upload.
- f Click **Yes** to proceed.  
The system checks the *CRL* file and displays a message that the certificate was loaded successfully.
- g Repeat Steps *d* through *f* until all of the required *CRL* files has been updated.

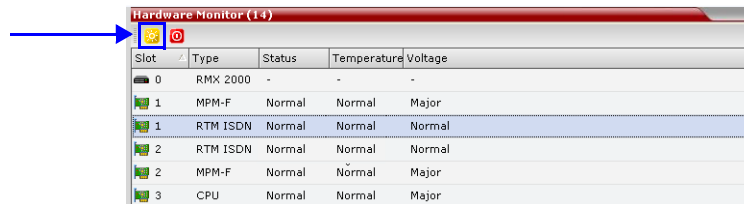
**Step 5: Update the repository.**

When all the *CRL* files have been updated as described in *Step 4*:

- a Click **Update Repository**.  
A repository update confirmation message is displayed.
- b Click **OK** to update the repository.

**Step 6: Re-connect to the RMX.**

- a Remove the *USB* device that was connected in *Step 2a*.
- b Restart the *RMX*.
- c In the *RMX Management* pane, click the **Hardware Monitor** button.  
The *Hardware Monitor* pane is displayed.



- d Click the **Reset** button.

The *RMX* restarts. System restart can take 5 - 10 minutes, depending on the *RMX*'s configuration.

Using the *RMX Manager*:

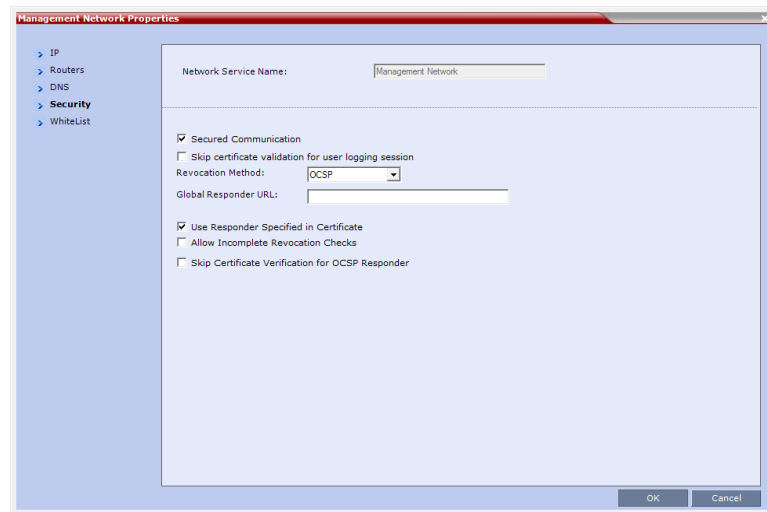
- e In the *MCUs* list, select the *RMX* to be updated.
- f Right-click in the *MCUs* list entry and select **Connect**.
- g Click **Accept** to accept the warning banner.
- h Enter an administrator *Username* and *Password*.
- i Click **OK**.

**Step 7: Re-enable Secured Communications Mode.**

Using the *RMX Manager*:

- a In the *RMX Management* pane, click the **IP Network Services** button. (Depending on the *RMX Manager* configuration, you may have to click **Rarely Used** first.)
- b In the *IP Network Services* list pane, double-click **Management Network**.

The *Management Network Properties* dialog box is displayed.



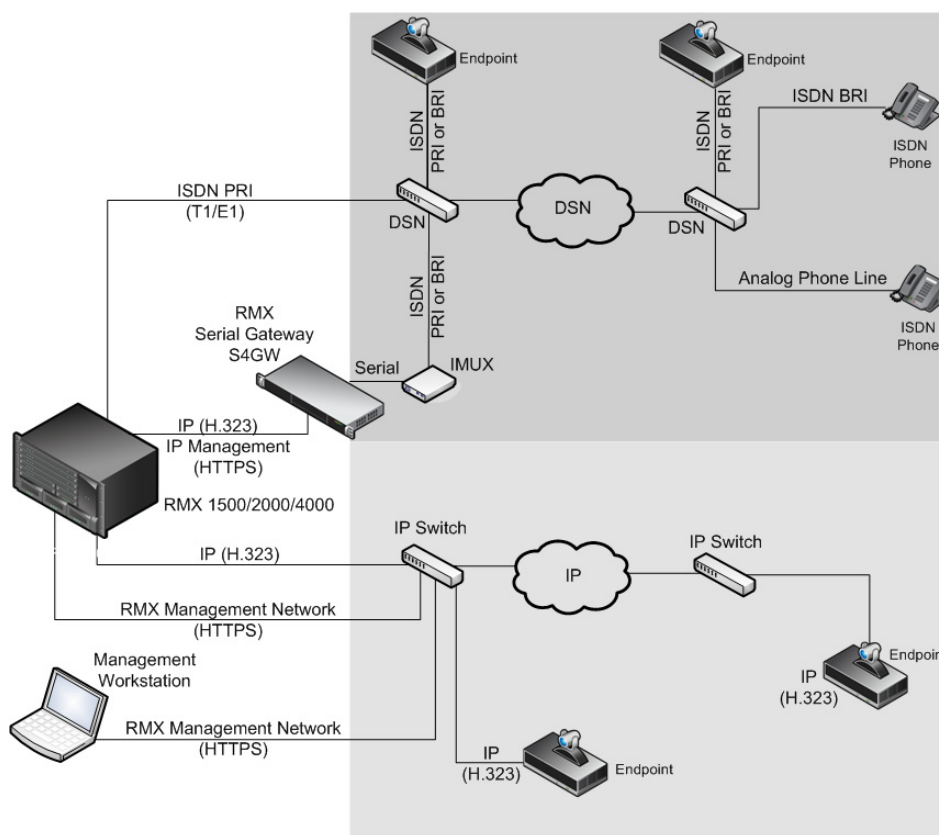
- c** Select the *Secured Communication* check box.
- d** Click **OK**.  
A message informs you that your session will be disconnected and that you must re-connect the *RMX* using **https** in the browser *URL*.
- e** Click **OK**.  
A system restart confirmation message is displayed.
- f** Click **Yes** to restart the *RMX*.  
The *RMX* restarts. System restart can take 5 - 10 minutes, depending on the *RMX*'s configuration.
- g** In the *MCUs* list, select the *RMX* to be updated.
- h** In *MCU Properties*, change the *Port* number from **80** to **443**.
- i** Click **OK**.



# Deploying a Polycom RMX™ Serial Gateway S4GW

UC-APL Public Key Infrastructure (PKI) requires that the *Serial Gateway S4GW* be connected directly to the RMX and not to the H.323 network. The *Serial Gateway* effectively becomes an additional module of the RMX, with all web and H.323 traffic passing through the RMX.

## Network Infrastructure



**Figure 4-1** Network infrastructure with direct connection to Serial Gateway S4GW

After initial setup, the *Serial Gateway* is configured, managed and monitored via the *RMX Manager*. For more information see “*Setting Up Your Polycom RMX Serial Gateway S4GW*” in the *RMX Serial Gateway S4GW System User Guide*.

## Guidelines

- The *Serial Gateway* is supported on RMX 1500/2000/4000 systems.
- A *Serial Gateway* can be associated with only one *Network Service*.
- Although the *Media* and *Signaling Network Service* on the RMX can be configured for IPv6 addressing, the *Network Service* assigned to the *Serial Gateway* can only support IPv4 addressing.
- For all RMX platforms:
  - The following *System Flags* must be set to **YES**:
    - **ULTRA\_SECURE\_MODE**
    - **V35\_ULTRA\_SECURED\_SUPPORT**
- In addition, for RMX 2000, when connecting a *Serial Gateway*:
  - It is essential that an *RTM LAN* card is installed.
  - The *Serial Gateway* must be physically connected to a *RTM LAN* card, *LAN 1* port.
  - The **SEPARATE\_MANAGEMENT\_NETWORK** *System Flag* must be set to **YES**.
  - The **RMX2000\_RTMLAN** *System Flag* must be set to **YES**.
- Beginning with Version 7.5.2.J, a *Serial Gateway* can be connected directly to any available *RTM-LAN* port on the RMX that is associated with a *Network Service*.
- If *Content* is to be shared the conference *Profile* should have *Content Protocol* set to **H.263**.
- When the RMX is in *Ultra Secure Mode*, it requires that the *Serial Gateway* be in *Maximum Security Mode*. For more information see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Deployment Guide for Maximum Security Environments*, "*Serial Gateway S4GW - Maximum Security Mode*" on page **4-12**.
- H.323 connections to the RMX are 1024-bit encrypted *TLS*.
- *RTP* traffic between the RMX and the *Serial Gateway* are not encrypted.
- If the certificates installed on the *Serial Gateway* and the RMX are signed by the same *Certificate Authority*, that *Certificate Authority* must be trusted. If the certificate installed on the *Serial Gateway* was issued by a different *Certificate Authority* to the one that issued the RMX certificate, the *Certificate Authority* trust that signed the *Serial Gateway* certificate must be added to the *Trusted Certificate Repository* on the workstation.
- An *RTM LAN* card must be installed in the RMX2000 or RMX4000 if an RMX *Serial Gateway S4GW* is to be directly connected to the RMX.

## Configuring the RMX - Serial Gateway Connection

Configuring the connection between the *Serial Gateway* and the RMX consists of the following procedures:

### 1 Initial Setup of the Serial Gateway

Initial Setup must be completed for **each** of the *Serial Gateways* to be deployed. For more information see "*Setting Up Your Polycom RMX Serial Gateway S4GW*" in the *RMX Serial Gateway S4GW System User Guide*.

### 2 Configure a Network Service on the RMX for each of the Serial Gateways and Connect the Serial Gateways to the RMX

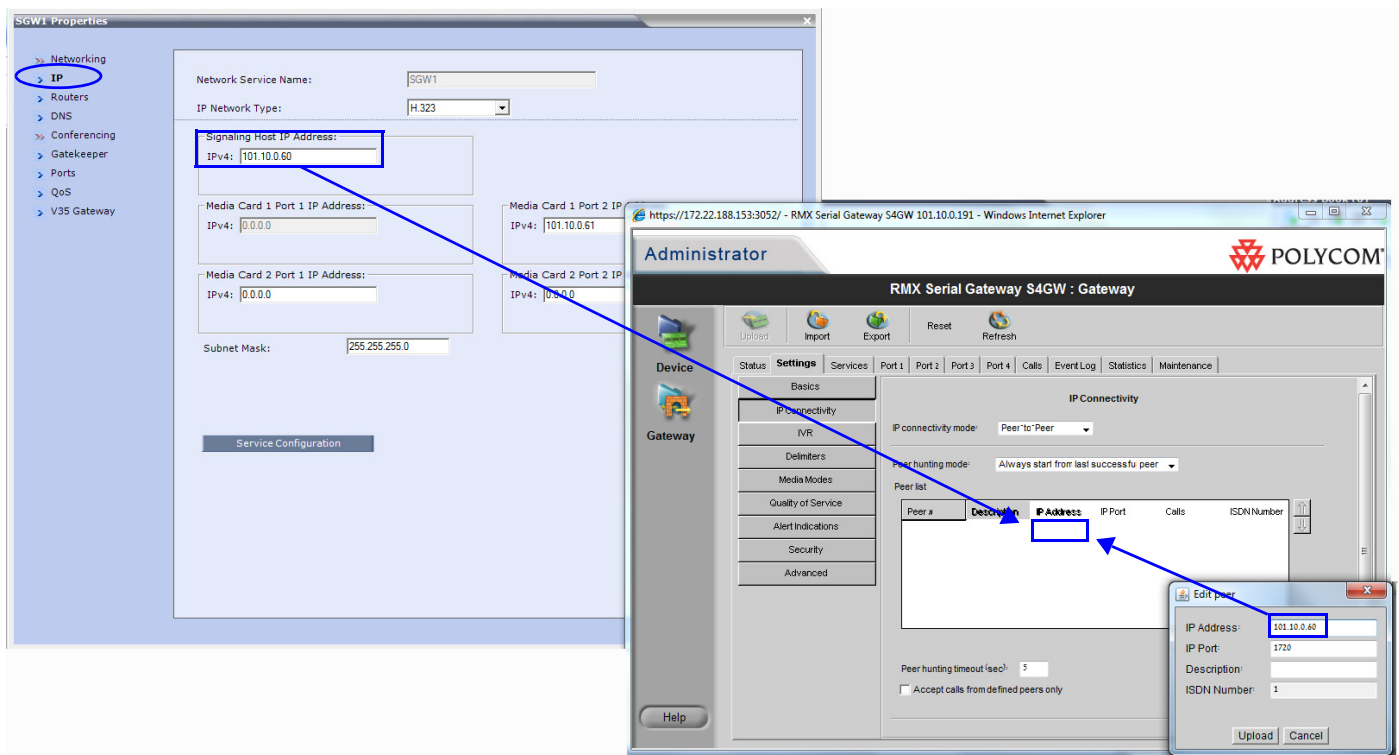


## Procedure 1: Initial Setup of the Serial Gateway

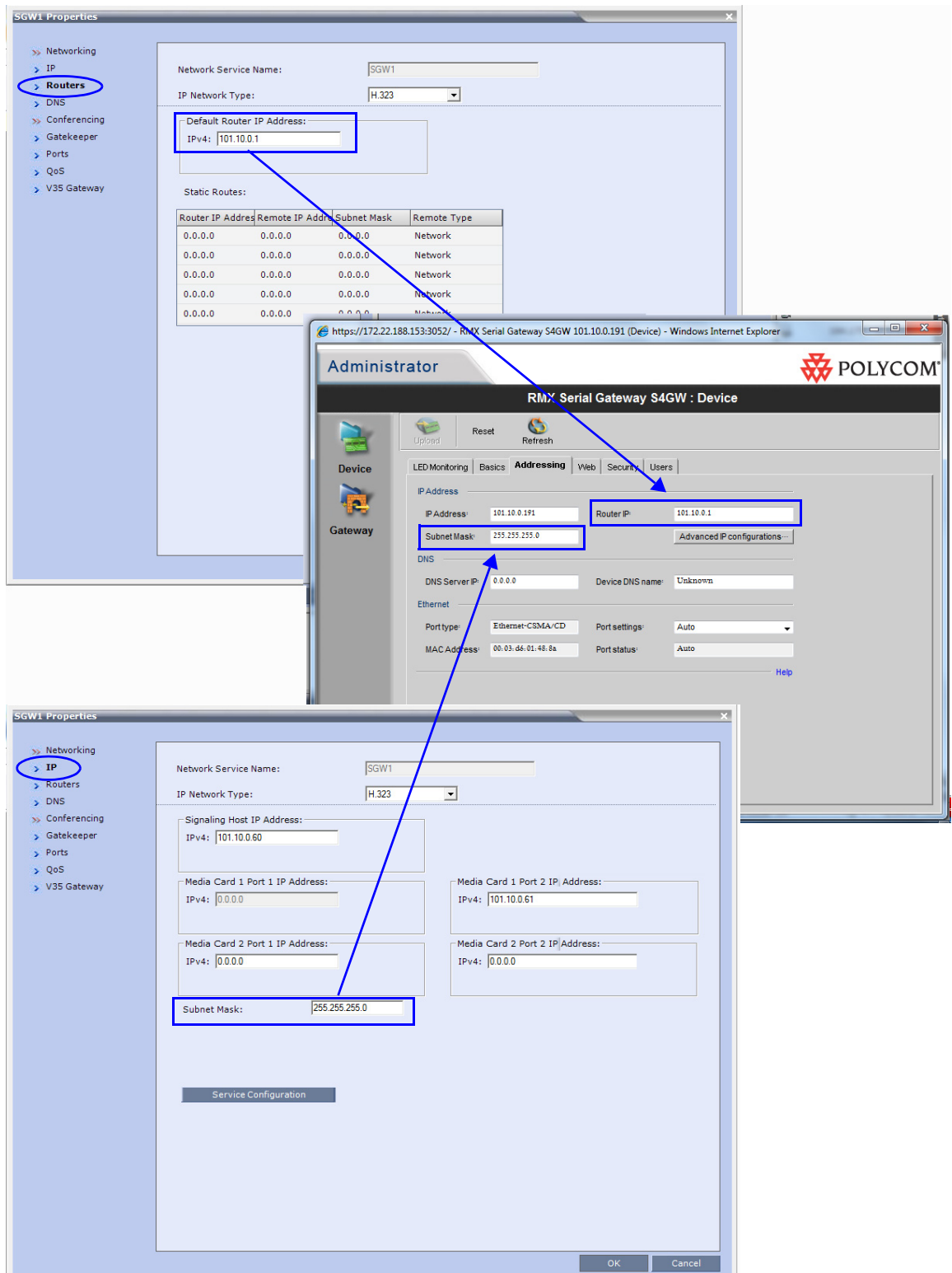
The IP Addresses on the RMX that match those described in this procedure are described in "Procedure 2: Configure a Network Service on the RMX for the Serial Gateway and Connect the Serial Gateway to the RMX" on page 4-7.

- 1 Establish a serial connection between the *Serial Gateway* and the workstation. For more information see "Setting Up Your Polycom RMX Serial Gateway S4GW" in the *RMX Serial Gateway S4GW System User Guide*.
- 2 In the *Administrator > Device > Settings > IP Connectivity > Peer List*, enter the *Signaling Host IP Address* (Signaling and Media). The RMX will use this IP address to connect to the *Serial Gateway's* management interface.

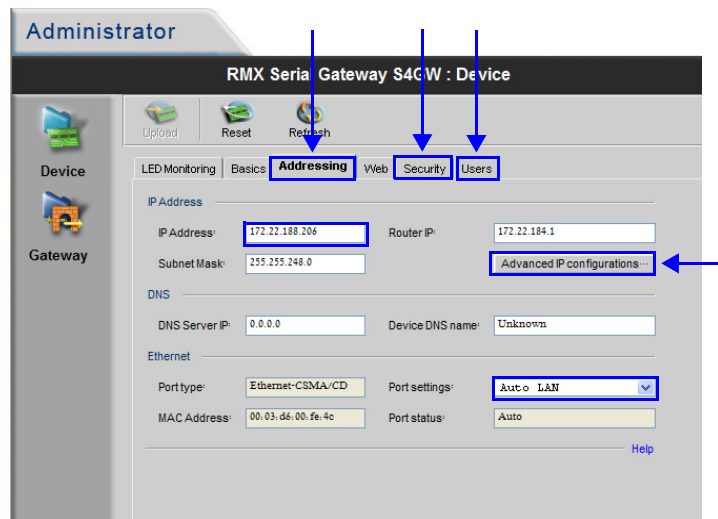
Remove all other addresses from the *Peer list*. Each *Serial Gateway* uses the address of the LAN port on the RTM-LAN card that is assigned to its *Network Service*.



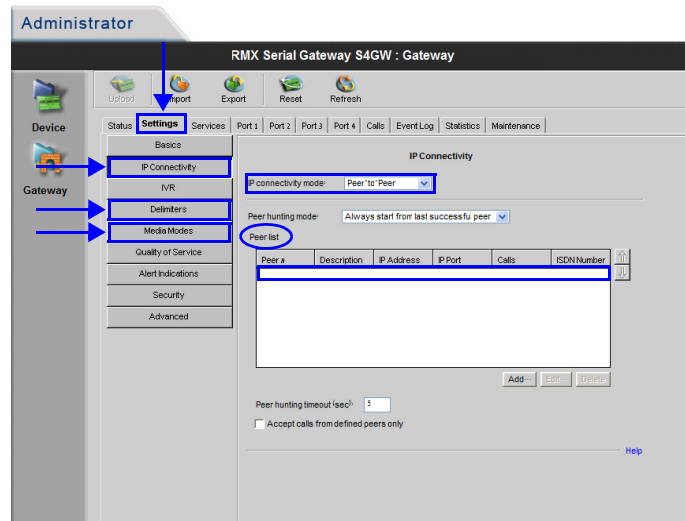
- 3 In the *Device > Addressing > IP Address* Dialog Box:
  - In the *Router IP* field, enter the *Default Router IP Address*.
  - In the *Subnet Mask* field, enter the *Subnet Mask* address.



- 4 In the Port settings field, select Auto LAN. (If configured as 100 Mbps/Full Duplex while directly connected to the RMX, the Serial Gateway network adapter is disabled and until the cable is disconnected and reconnect to the RMX.)

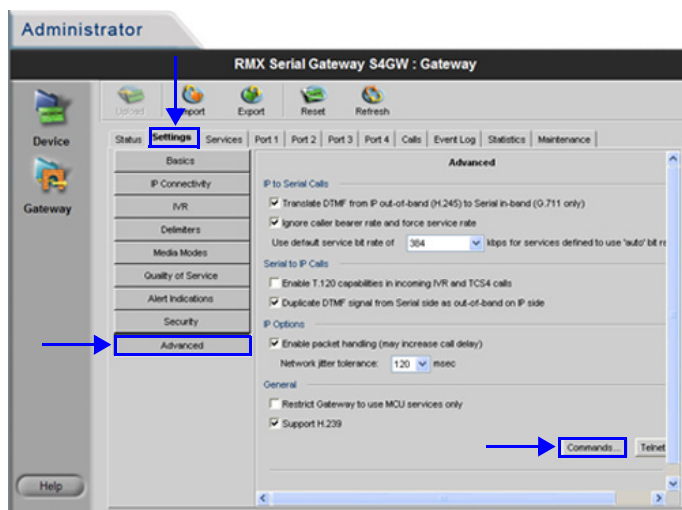


- 5 Click the **Advanced Configurations** button and verify that:
  - *VLAN Tagging* is **disabled**
  - *Use different interface for media and signaling* is **disabled**.
 If they are not disabled, disable them.
- 6 Select the **Security** tab.
- 7 Set the *Security Mode* to **Maximum**.
- 8 Select the **Users** tab.
- 9 Create the user account that the *RMX* will use to connect to the *Serial Gateway*.



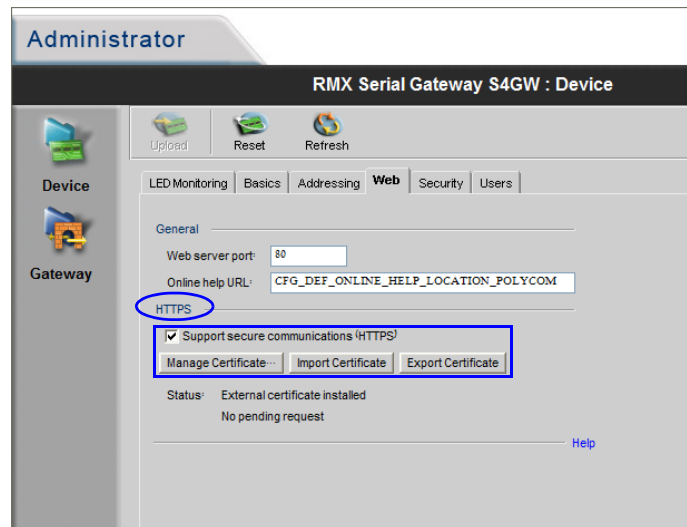
- 10 Click the **Delimiters** tab.
  - a Set the delimiter to #.
- 11 Click the **Media Modes** tab.
  - a Un-check *Enable H.263+*.
  - b Un-check *Enable T.120*.

- 12 Click the **Security** tab.
  - a Select **Independent**.
- 13 Click the **Advanced** tab.



- a Verify the following settings:
  - **IP to Serial calls:**
    - *Translate DTMF from IP...* **Selected.**
    - *Ignore caller bearer...* **Selected.**
    - *Use default service bit rate of* **384 kbps ...**
  - **Serial to IP calls:Table 4-3**
    - *Enable T.120 capabilities ...* **Un-selected.**
    - *Duplicate DTMF signal ...* **Selected.**
  - **IP Options:**
    - *Enable packet handling...* **Selected.**
    - *Network jitter tolerance...* **120 msec.**
  - **General:**
    - *Restrict Gateway to use ...* **Un-selected.**
    - *Support H.239* **Selected.**
- 14 Click the **Commands** button.
  - a Enter the advanced commands as set out in Table 4-2 on page 4-13.
  - b Set command **embeddedMode** to **Enable**
  - c Set command **IsdnCapsTimeout** to **15**
  - d Set command **h239OlcPatch** to **Enable**
- 15 For each port in use un-check **IVR**.

- 16 In the *HTTPS* section of the *Administrator > Device > Web* dialog box:
  - a Use the buttons to install a *TLS Certificate*.
  - b Select the **Support Secure Communications (HTTPS)** check box.



For more information see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Deployment Guide for Maximum Security Environments, "Serial Gateway S4GW - Maximum Security Mode"* on page **4-12**.

- 17 Save the changes to the *Serial Gateway* configuration.  
The *Serial Gateway* will re-start.
- 18 Disconnect the *Serial Gateway* from the workstation.

## Procedure 2: Configure a Network Service on the RMX for the Serial Gateway and Connect the Serial Gateway to the RMX

- 1 In the *RMX* menu, click **Setup > System Configuration**.
- 2 Set the following *System Flags*:
  - **ULTRA\_SECURE\_MODE = YES**
  - **SEPARATE\_MANAGEMENT\_NETWORK = YES**  
(*RMX 2000* only)
  - **V35\_ULTRA\_SECURED\_SUPPORT = YES**
  - **ENABLE\_EPC = NO** (If this *System Flag* doesn't exist it must be created)
- 3 Re-start the *RMX*.
- 4 For versions prior to Version 7.5.2.J, connect the *LAN* cable from the front of the *Serial Gateway* to the *LAN 1* port on the *RTM LAN* card.  
If Version 7.5.2.J is being used, connect the *Serial Gateway* to any available *RTM-LAN* port on the *RMX* that is associated with a *Network Service*.
- 5 In the *RMX Management* pane, click **Rarely Used** and click **IP Network Services**.
- 6 In the *IP Network Services* list pane click the **New IP Service** icon.

The *New IP Service* dialog box is displayed.

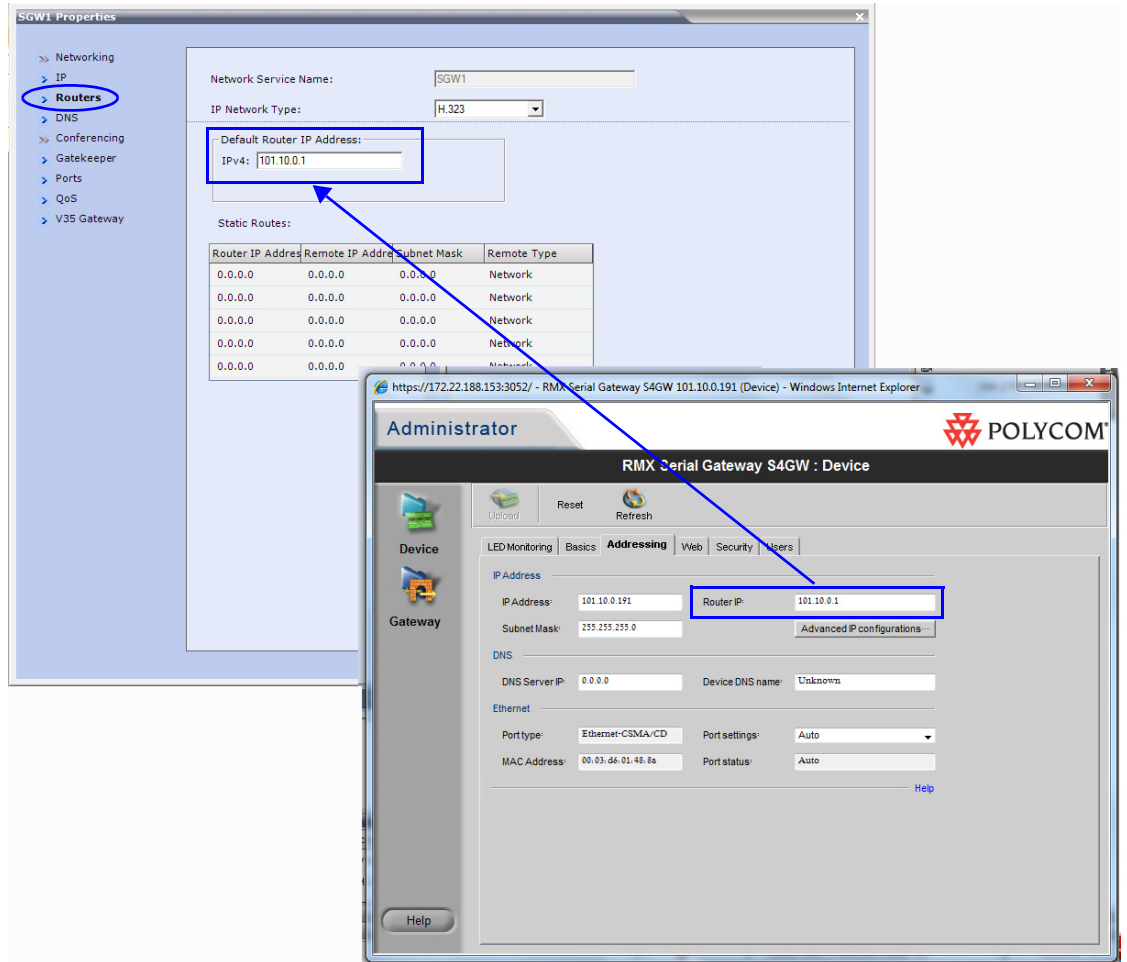
The screenshot shows the 'SGW1 Properties' dialog box with the 'IP' tab selected. The 'IP' tab is circled in blue. The configuration fields are as follows:

Field	Value
Network Service Name	SGW1
IP Network Type	H.323
Signaling Host IP Address (IPv4)	101.10.0.60
Media Card 1 Port 1 IP Address (IPv4)	0.0.0.0
Media Card 1 Port 2 IP Address (IPv4)	101.10.0.61
Media Card 2 Port 1 IP Address (IPv4)	0.0.0.0
Media Card 2 Port 2 IP Address (IPv4)	0.0.0.0
Subnet Mask	255.255.255.0

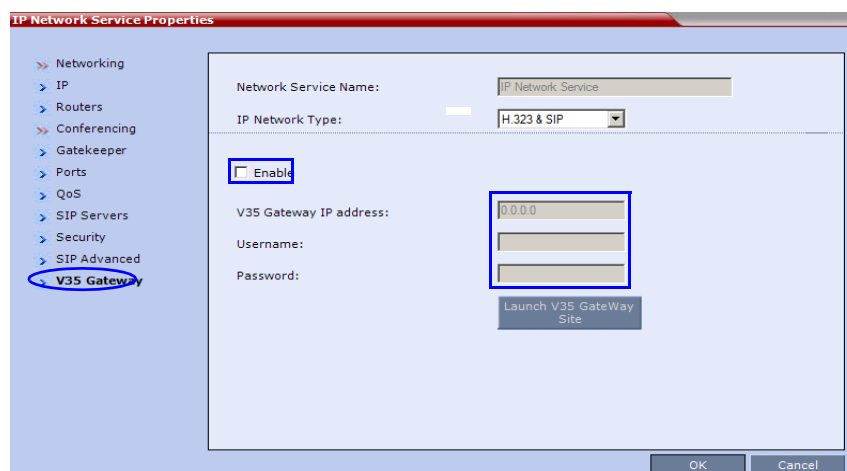
Buttons: Service Configuration, OK, Cancel

- 7 In the *IP* tab:
  - a Enter an *IP Network Service Name*.
  - b Enter a *Signaling Host IP Address* that is on the same *VLAN* as the *Serial Gateway Management* address.
  - c Enter a *Media Card 2 Port 1 IP Address* that is on the same *VLAN* as the *Serial Gateway Management* address.

- 8 Click the **Routers** tab.
- 9 Enter a *Default Router IP Address* that is on the same VLAN as the *Serial Gateway Management* address. (This address was configured in Step 3 of "Procedure 1: Initial Setup of the Serial Gateway" on page 4-3.)



- 10 Click the **V35 Gateway** tab.  
The network service *Properties* dialog box is displayed. The *Enable* field is selected and cannot be un-checked.



- 11 Modify the following fields:

**Table 4-1** Network Service - V35 tab

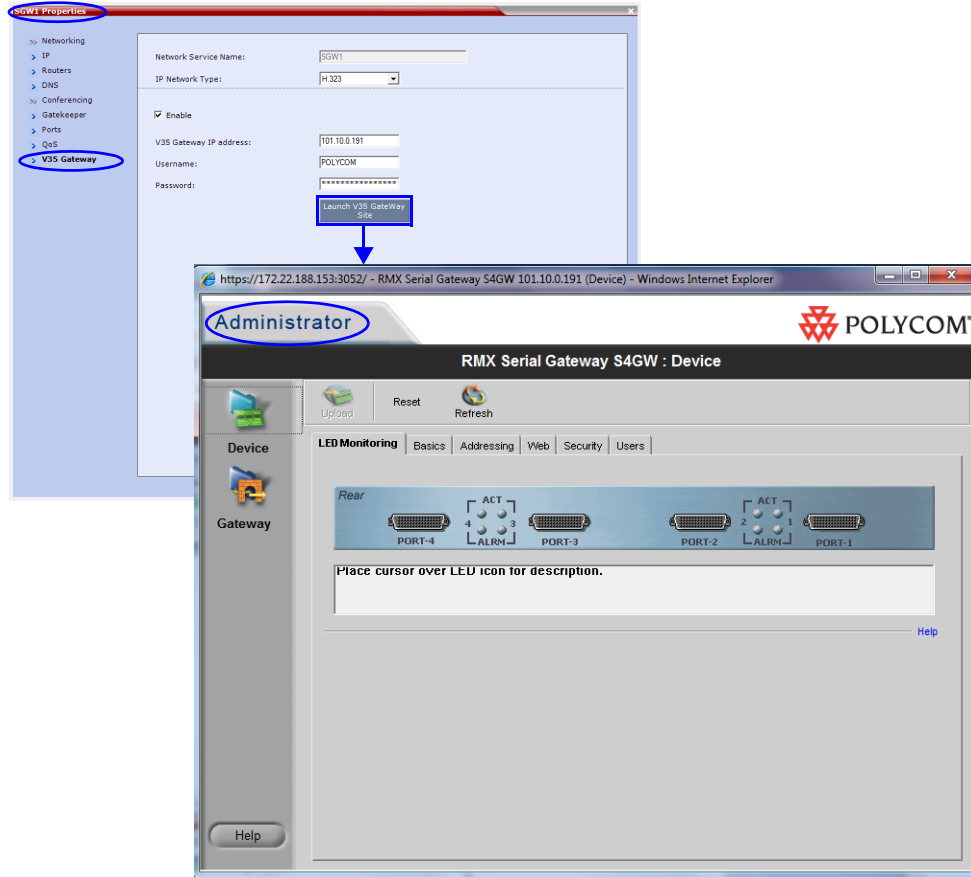
Field	Description
<i>V35 Gateway IP Address</i>	Enter the <i>Management IP</i> address of the management interface of the <i>Serial Gateway</i> .
<i>Username</i>	Enter the <i>User Name</i> that the <i>RMX</i> uses to log in to the management interface of the <i>Serial Gateway</i> .
<i>Password</i>	Enter the <i>Password</i> that the <i>RMX</i> uses to log in to management interface of the <i>Serial Gateway</i> .

- 12 Click **OK**.  
A *Reset Confirmation* dialog box is displayed
- 13 Click **Yes**.
- 14 After the *RMX* has restarted, log in.
- 15 Modify the *Video Quality* tabs of all conference *Profiles*, by changing the *Content Video Definition - Content Protocol* setting of all conferences to **H.263**.



## Management of Serial Gateways

After initial setup, if necessary, *Serial Gateways* can be further configured, managed and monitored using the *RMX Manager*. Clicking the **Launch V35 Gateway Site** button in the *Network Properties -V35 Gateway* dialog box opens the *Serial Gateway's Administrator* console.



For more information see “*Setting Up Your Polycom RMX Serial Gateway S4GW*” in the *RMX Serial Gateway S4GW System User Guide*.



The administrator may also use the following *URL* for administration of the *RMX Serial Gateway*:  
 URL: [https://\[rmx FQDN\]/admin/gw/login.asp](https://[rmx FQDN]/admin/gw/login.asp)



For users deploying a *RMX Serial Gateway S4GW*, the **VIEW\_RVGW\_ACTIVEX** *System Flag* can be added and its value modified to determine if *ActiveX* controls are used to display the *RMX Serial Gateway S4GW* web site. If the flag value is set to **NO** (default) an external *Internet Explorer* browser is launched to display the *RMX Serial Gateway S4GW* web site.  
 For more information see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide "ActiveX Bypass"*.

## Testing

### Dialing to the RMX from an ISDN Endpoint

To dial to the RMX from an ISDN endpoint:

**Dial String:** <ISDN Number of AdTran>##<Conference  
\_Room\_Number>

**Example:** 5556789##4000



- The password can be included in the dial string by adding #<password> at the end of the dial string.
- The password can be entered via DTMF from the endpoint (HDX) if including it in the dial string would create a security concern.

### Dialing to an ISDN Endpoint from the RMX

To dial to an ISDN endpoint from the RMX:

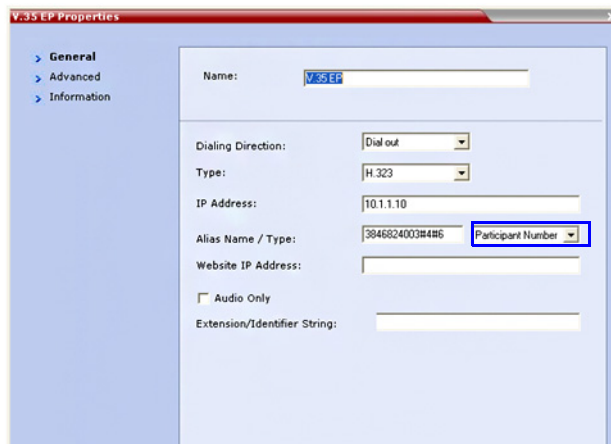
**IP Address:** The IP address of the *Serial Gateway*

**Alias Name /Type:** <service prefix><ISDN Number><AdTran  
suffix> and select **Participant Number**

The first number in the *AdTran* suffix is the bit rate  
(#3 for 56kbps, #4 for 64kbps).

The second number in *AdTran* suffix is the number of  
*B Channels*.

**Example:** For a 384kbps call:



## Serial Gateway S4GW - Maximum Security Mode

In *Ultra Secure Mode*, it is required that the *S4GW Serial Gateway* operates in *Maximum Security Mode*.

**To enable Maximum Security Mode:**

- 1 Login to the *Gateway* as an administrator:
  - a In your browser type the URL of the *Gateway*.

- If *HTTPS* is enabled, a *Security Alert* screen is displays.
- b** Click **Yes** to proceed and display the Administrator login screen. Click **No** to cancel the current operation.
  - c** Type a *user name* and *password*.
  - d** Click **Login**.
- 2** Enable *Maximum Security Mode*:
    - a** In the *Gateway* interface, on the sidebar, click **Device**.
    - b** Click the **Security** tab.
    - c** In the *Security mode* field, select **Maximum** (no Telnet, ftp, SNMP and ICMP)
  - 3** Verify the *Advanced Settings* for *Maximum Security Mode*:
    - a** In the *Gateway* interface, on the sidebar, click **Gateway**.
    - a** Click the **Settings** tab.
    - a** Click **Advanced >> Commands**.  
The *Advanced Settings* dialog box is displayed.
    - b** Enter the *Advanced Commands* in *Table 4-2* and observe the returned *Status Messages*. If necessary, modify the settings to match those listed in the table.  
For more information see "*Advanced Commands*" on page **4-15**.

**Table 4-2** Maximum Security - Advanced Command Settings

Advanced Command	Status message	Status After Setting/ Enable
<i>advancedsecuritymode</i>	Advanced Security Mode is currently <b>DISABLED</b>	Advanced Security mode - ENABLED
<i>embeddedMode</i>	<b>ENABLED</b>	
<i>daysForPassword ExpireNotification</i>	Number of days till password expiration is set to <b>7</b>	NO CHANGE NEEDED
<i>h239OlcPatch</i>	<b>ENABLED</b>	
<i>IsdnCapsTimeout</i>	<b>15</b>	
<i>lowerCaseMinimum</i>	Minimum lower case chars in password is set to <b>2</b>	NO CHANGE NEEDED
<i>MinNumberOfChangedChars</i>	Minimum number of changed chars in password is set to <b>4</b>	NO CHANGE NEEDED
<i>NumberOfRepeatCharsAllowed</i>	Number of repeated chars in password is set to <b>2</b>	NO CHANGE NEEDED

**Table 4-2** Maximum Security - Advanced Command Settings (Continued)

Advanced Command	Status message	Status After Setting/ Enable
<i>numericalCharsMinimum</i>	Minimum numerical chars in password is set to <b>2</b>	NO CHANGE NEEDED
<i>passwordChangeMinimumTime</i>	Minimum time between password changes is <b>1</b>	NO CHANGE NEEDED
<i>passwordReuseBuffSize</i>	The size of the re-usebuffer is <b>10</b>	NO CHANGE NEEDED
<i>SpecialCharsMinimum</i>	Minimum special chars in password is set to <b>2</b>	NO CHANGE NEEDED
<i>upperCaseMinimum</i>	Minimum upper case chars in password is set to <b>2</b>	NO CHANGE NEEDED

**c** Log out.

**4** Request a *Web SSL* certificate:

**a** Click **Device >> Web Tab > Manage Certificate**.

**a** Select the **Manage Certificate** button and follow the prompts to request the certificate.

For more information see the *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide for Maximum Security Environments, "Certificate Configuration and Management"*.

**5** Install the *Web SSL* certificate:

**a** Click **Device >> Web Tab >> Manage Certificate**.

**a** Select the **Manage Certificate** button

**b** Select **Process Pending Request**

For more information see *RealPresence Collaboration Server (RMX) 1500/2000/4000 Administrator's Guide for Maximum Security Environments, "Certificate Configuration and Management"*.

## Advanced Commands

**Table 4-3** Advanced Commands

Command	Parameters	Description	Default
<i>Advanced Security Mode</i>	ENABLE	This command puts the Gateway in MAXIMUM security mode. Used by: CS	The default of the Gateway will be in MINIMUM security mode , but once the user sets the Gateway to Maximum security the only way to go back to Standard security is by the 'Setting Factory Defaults' procedure.
<i>Session Inactivity Enabled Timeout</i>	5-60 minutes	Sets the Inactivity timeout value. Web will disconnect from GW if user is inactive for this period of time.	10 minutes
<i>password Change Minimum Time</i>	1-30 days	Sets the minimum number of days needed to pass before User can change his/her own password. This value is not valid for administrators	1 day
<i>minimum Password Length</i>	8-15	Sets the minimum length of a valid password	15
<i>upperCase Minimum</i>	1-2	Sets the minimum number of upper case characters needed for a valid password.	2
<i>lowerCase Minimum</i>	1-2	Sets the minimum number of lower case characters needed for a valid password.	2
<i>Numerical Chars Minimum</i>	1-2	Sets the minimum number of numerical characters needed for a valid password.	2
<i>Special Chars Minimum</i>	1-2	Sets the minimum number of special characters needed for a valid password.	2
<i>NumberOf Repeat Chars Allowed</i>	1-4	Sets the number of repeated characters allowed in valid password.	2
<i>Min NumberOf Changed Chars</i>	1-4	Sets the minimum number of characters needed to change when setting new password.	4

**Table 4-3** Advanced Commands (Continued)

Command	Parameters	Description	Default
<i>daysFor Password Expire Notification</i>	1-7	Sets the number of days before password expires that a 'password expiration notice' will be shown to user.	7
<i>password ReuseBuff Size</i>	8-16	Sets the number of passwords saved to check for reuse. i.e. if the buffer is set to 10, then the user cannot re-use any of the last 10 passwords.	10
<i>user LockedOut Duration</i>	0-480 minutes	Sets the number of minutes before user that was locked out will be automatically released. Value of 0 – means indefinite.	0
<i>user Session Limit</i>	1-10 sessions	Sets the number of simultaneous sessions per user allowed.	5
<i>auditLog Threshold</i>	10 -100 percent of log capacity	Sets the audit log threshold, so that when this value is reached an audit log overflow trap is sent.	70
<i>Password Expiration Timeout</i>	30-180 days	Sets the number of days till password will expire.	60
<i>User Lockout Failures Interval</i>	60-1440 minutes. (1440 = 24 hours)	Period of time in which the failed login threshold must be exceeded the lock the users account.	60
<i>User Lockout MaxFailure</i>	2-10	Sets the number of login failures needed to lockout user. Failed login threshold.	3

# Appendix A

## Troubleshooting

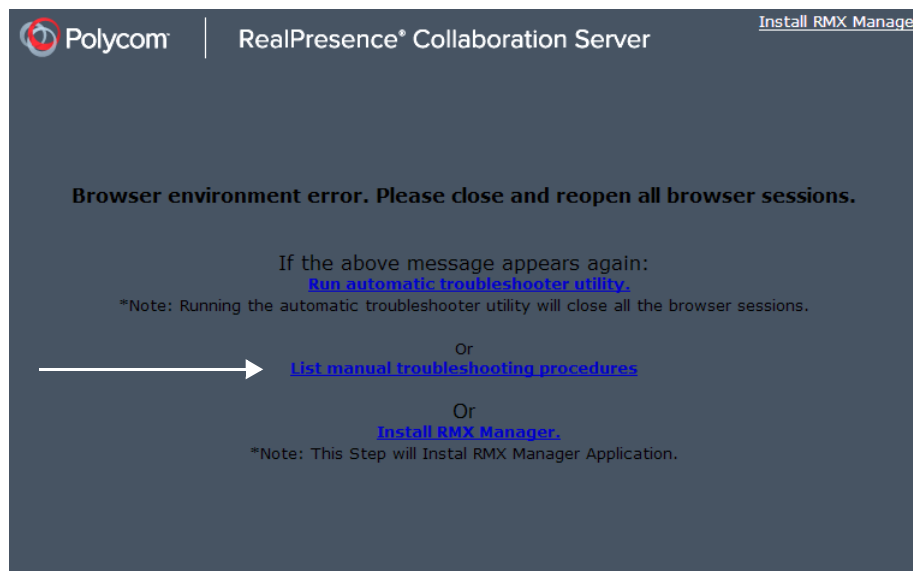


Use of the *RMX Web Client* is not recommended in *Maximum Security Environments*. Management using the *RMX Manager* is the recommended method.

### Collaboration Server Web Client Installation - Troubleshooting Instructions

If a *Browser Environment Error* occurs, close all the Internet Explorer sessions and reconnect to the MCU.

**If the problem persists**, you can run the *Automatic Troubleshooting Utility* or perform the *Troubleshooting Procedures* manually.



The *Manual Troubleshooting Procedures* include several procedures that can be performed in order to solve the connection error. At the end of each procedure, check if you can connect to the MCU and if the problem persists, perform the next procedure.



In *Secured Mode (https://)*, the *DNS* name specified in the *RMX's Certificate* must correspond with that of the *DNS Server* used by the *Client* that is connecting to the *RMX*.

The following troubleshooting procedures can be performed manually:

- Procedure 1: Ending all Internet Explorer Sessions

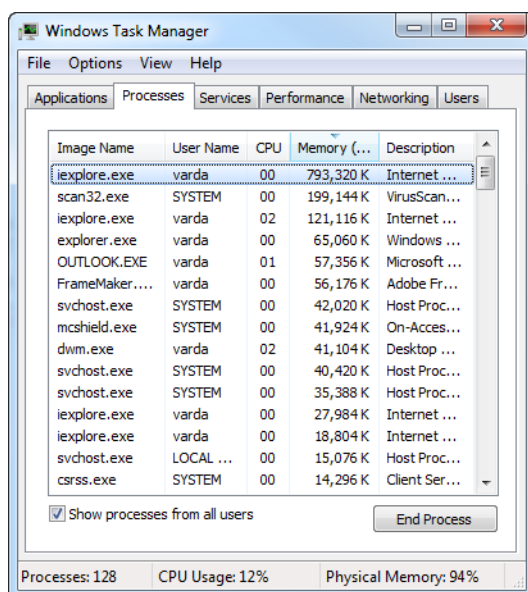
- Procedure 2: Deleting the Temporary Internet Files, Collaboration Server Cookie and Collaboration Server Object
- Procedure 3: Managing Add-ons Collisions
- Procedure 4: Add the Collaboration Server to the Internet Explorer Trusted Sites List
- Procedure 5: Browser Hosting Controls (Optional)

## Procedure 1: Ending all Internet Explorer Sessions

In some cases, although all the Internet Explorer sessions were closed, the system did not end one or several IE processes. These processes must be ended manually.

**To end all Internet Explorer sessions:**

- 1 Start the **Task Manager** and click the **Processes** tab.
- 2 Select an **ieexplore** process and click the **End Process** button.



- 3 Repeat this process for all **ieexplore** processes that are currently active.
- 4 Close the *Windows Task Manager* dialog box.
- 5 Open the Internet Explorer and connect to the MCU.

If the problem persists, continue with Procedure 2.

## Procedure 2: Deleting the Temporary Internet Files, RMX Cookie and RMX Object

If at the end of Procedure 1 the error message is still displayed, and you cannot connect to the MCU, perform the following operations:

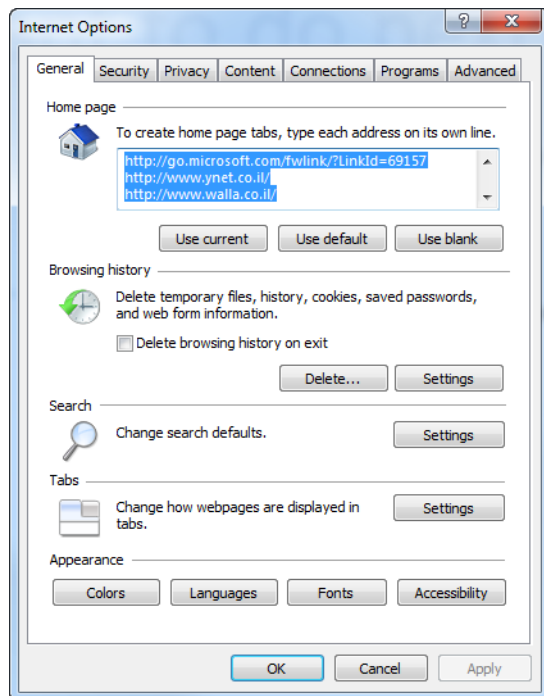
- Delete the Temporary Internet files
- Delete the RMX/Collaboration Server Cookie
- Delete the RMX/RMX ActiveX Object



## Deleting the Temporary Internet Files

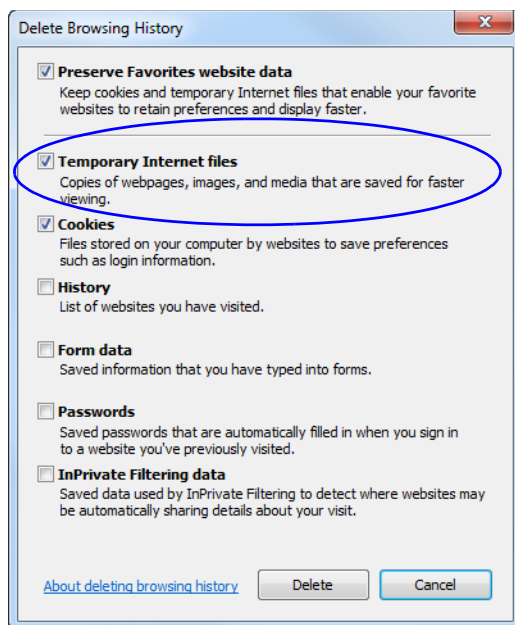
To delete the Temporary files:

- 1 In the *Internet Explorer*, click **Tools > Internet Options**. The *Internet Options* dialog box opens.
- 2 In the *Browsing history* pane, click the **Delete** button.



The *Delete Browsing History* dialog box opens.

- 3 It is recommended to delete only the **Temporary Internet files**. By default, the **Cookies** option is also selected. Clear it if you do not want to clear the cookies from your computer.

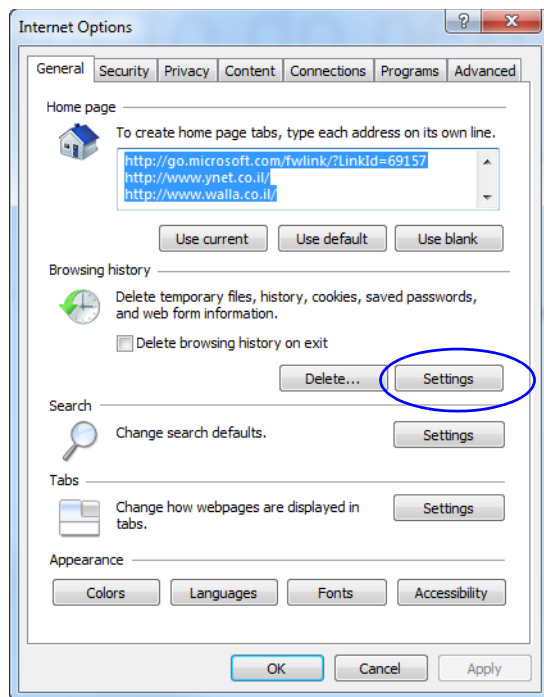


- 4 Click the **Delete** button.
- 5 When the process is complete, the system return to the *Internet Options* dialog box.

## Deleting the RMX/Collaboration Server Cookie

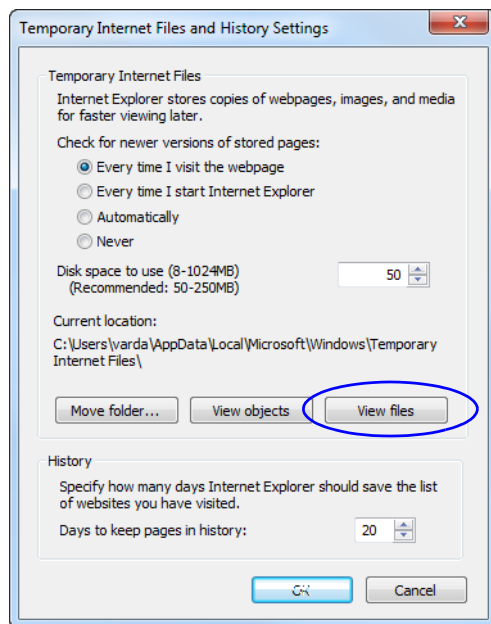
To delete the RMX Cookie:

- 6 In the *Internet Options* dialog box - *Browsing History* pane, click the **Settings** button.



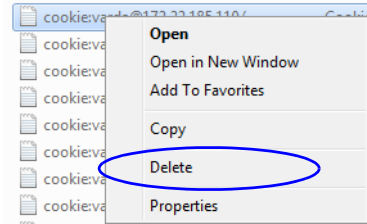
The *Temporary Internet Files and History Settings* dialog box opens.

- 7 Click the **View files** button.



The Windows Explorer screen opens, listing Windows *Temporary Internet Files*.

- 8 Browse to the RMX/ RMX cookie.  
The cookie is listed in the format: **cookie:user name@RMX/RMX IP address**. For example: **cookie:valerie@172.22.189.110**.
- 9 Right-click the RMX cookie and click **Delete**.



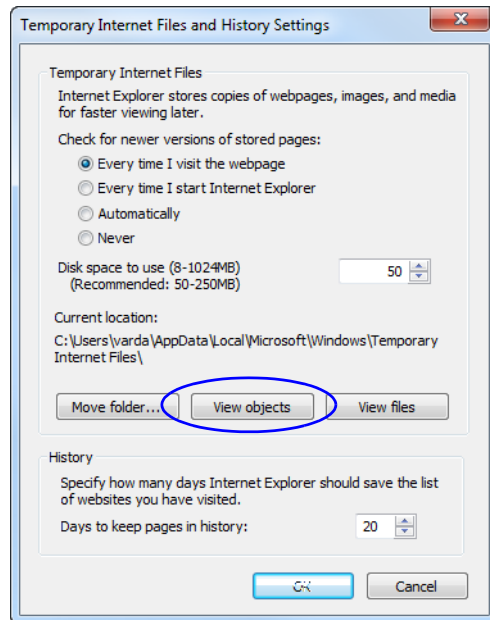
The system prompts for confirmation.

- 10 Click **Yes**.  
The cookie is deleted.
- 11 Close the Windows Explorer screen.

### Deleting the RMX/Collaboration Server ActiveX Object

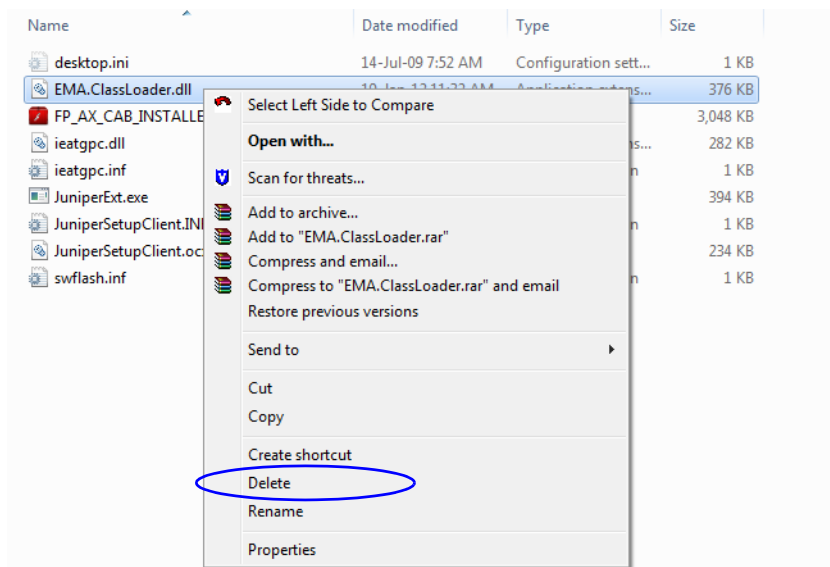
To delete the RMX/RMX ActiveX Object:

- 12 In the *Temporary Internet Files and History Settings* dialog box, click the **View objects** button.



The Windows Explorer screen opens, listing the Windows *Downloaded Program Files*.

**13** Right-click the **EMA.ClassLoader.dll** and then click **Delete**.



The system prompts for confirmation.

- 14** Click **Yes**.  
The RMX object is deleted.
- 15** Close the Windows Explorer screen.
- 16** In the *Temporary Internet Files and History Settings* dialog box, click **OK**.
- 17** In the *Internet Options* dialog box, click **OK** to close it.
- 18** Close the Internet Explorer session and reopen it.
- 19** Connect to the RMX.

If the problem persists, continue with Procedure 3.

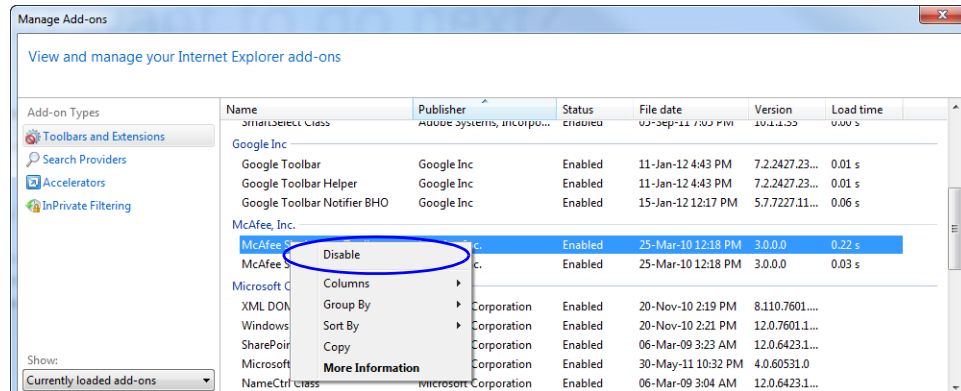
### Procedure 3: Managing Add-ons Collisions

In some cases, previously installed add-ons, such as anti virus programs can create collisions between applications and prevent the installation of a new add on. Disabling these add-ons may be required in order to install the RMX Web Client.

**To disable an add-on:**

- 1 In the *Internet Explorer*, click **Tools > Manage Add-ons**.  
The *Manage Add-ons - Toolbars and Extensions* dialog box opens.
- 2 Scroll to the add-on to disable (for example, the anti virus add-on), right-click it and then click **Disable**.

Alternatively, select the add-on and click the **Disable** button.



- 3 Click the **Close** button to close this dialog box.
- 4 Connect to the RMX.

If the problem persists, continue with the Procedure 4.

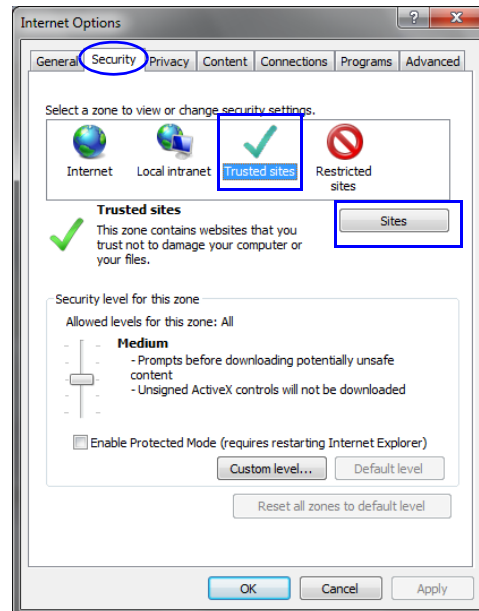
## Procedure 4: Add the Collaboration Server to the Internet Explorer Trusted Sites List

In some cases, local security settings may prevent *Internet Explorer* from accessing the RMX.

### To add the RMX to the *Internet Explorer* Trusted Sites list:

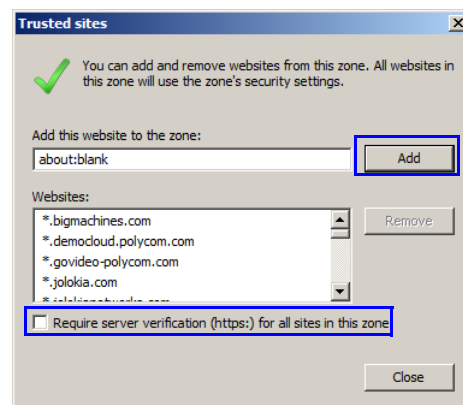
- 1 In the *Internet Options* dialog box, click the **Security** tab.

The **Security** tab is displayed.



- 2 Click the *Trusted Sites* tab.
- 3 Click the *Sites* button.

The *Trusted sites* dialog is displayed.



- 4 **If the Collaboration Server is using Secure Mode:**
  - a In the *Add this website to the zone:* field, enter, "https:// " followed by the IP address or the DNS name of the Collaboration Server.
  - b Click the **Add** button.
  - c Click the **Close** button.
- 5 **If the Collaboration Server is using Standard Security Mode:**
  - a In the *Add this website to the zone:* field, enter, "https:// " followed by the IP address or the DNS name of the Collaboration Server.
  - b Click the **Add** button.
  - c Clear the *Require server verification (https:) for all sites in this zone* checkbox.
  - d Click the **Close** button.

## Procedure 5: Browser Hosting Controls (Optional)

If the *Collaboration Server Web Client* does not load and run after *Procedures 1-4* have been performed, the reason may be that *.NET Framework 4* or higher is running on the workstation with *Managed Browser Hosting Controls* disabled.

*Managed Browser Hosting Controls* is an *Internet Explorer* operating mode required by the *Collaboration Server Web Client*. By default, *.NET Framework 4* and higher are not enabled to support *Managed Browser Hosting Controls*.

Perform *Procedure 5* to:

- Determine whether *.NET Framework 4* or higher is running on the workstation.
- Determine whether a *32-bit* or *64-bit* version of *Windows* is running on the workstation.
- Enable *Managed Browser Hosting Controls* if *.NET Framework 4* or higher is running on the workstation.

### To enable *Managed Browser Hosting Controls*:

- 1 Determine whether *.NET Framework 4* or higher is running on the workstation.
  - a On the *Windows Desktop*, click **Start**.
  - b In the *Start Menu*, click **Control Panel**.
  - c In the *Control Panel*, click **Programs and Features**.
  - d Inspect the **Programs and Features** list for the version of *Microsoft .NET Framework Client Profile* that is installed.
- 2 Determine whether a *32-bit* or *64-bit* version of *Windows* is running on the workstation:
  - a On the *Windows Desktop*, click **Start**.
  - b In the *Start Menu*, click **Computer**.
  - c In the *Computer Menu*, **System properties** and inspect the value of the *System type* field in the *System* section
- 3 Enable *Managed Browser Hosting Controls* if *.NET Framework 4* or higher is running on the workstation.
  - a Open the *Registry*.
  - b Navigate to the *Subkey*:
    - **32-bit System:**  
HKEY\_LOCAL\_MACHINE\SOFTWARE\MICROSOFT\ .NETFramework
    - **64-bit System:**  
HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Microsoft\ .NETFramework
  - c Add the *Dword Value: EnableIEHosting*
  - d Set value of *EnableIEHosting* to **1**.
  - e Close the *Registry*.
  - f Close and re-open *Internet Explorer*.

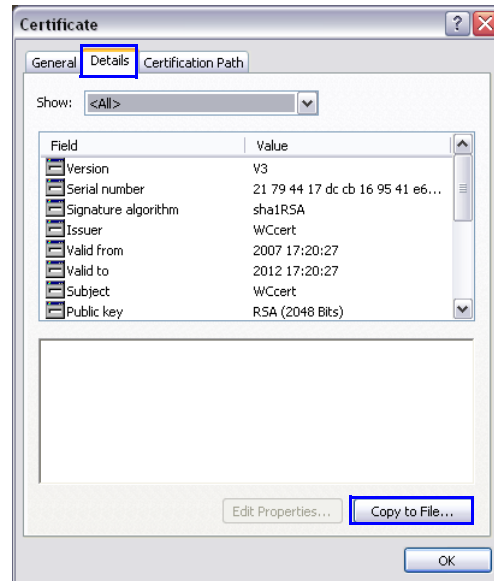


## Using an Internal Certificate Authority

If your TLS certificate was created and issued by an *Internal Certificate Authority*, it may not be seen as having been issued by a trusted *Certificate Authority*. The *RMX Manager* is not downloaded successfully and a warning is received stating that the certificate was not issued by a trusted *Certificate Authority*.

**To add the Internal Certificate Authority as a trusted Certificate Authority:**

- 1 Navigate to the folder where the certificate (.cer) file is saved.
- 2 Open the certificate file.

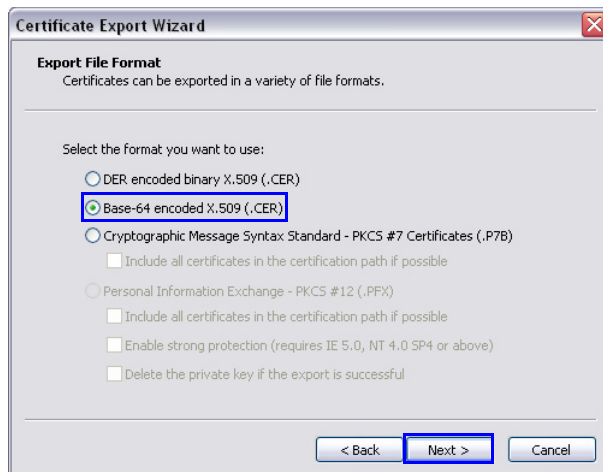


- 3 Click the **Detail** tab.
- 4 Click the **Copy to File** button.

The *Certificate Export Wizard* is displayed.



- 5 Click the **Next** button.  
The *Export File Format* dialog box is displayed.



- 6 Select **Base-64 encoded X.509 (.CER)**.
- 7 Click the **Next** button.  
The *File to Export* dialog box is displayed.



- 8 In the *File Name* field, enter the file name for the exported certificate.

- 9 Click the **Next** button.
- 10 The final *Certificate Export Wizard* dialog box is displayed.



- 11 Click the **Finish** button.  
The successful export message is displayed.



- 12 Click the **OK** button.

