

FlexNet Operations

Revera MCP Server User Guide



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1

FlexNet Operations Reverera MCP Server User Guide

Reverera MCP Server enables software producers' AI agents—such as **Microsoft Copilot**, **Amazon Q**, and **Claude**—to directly query FlexNet Operations Analytics data to answer natural-language questions across your monetization data.

This capability offers an alternative to navigating dashboards, building custom reports, or directly querying Snowflake data shares or data access APIs. Instead, users can ask questions in everyday language, while an AI agent dynamically coordinates the relevant data access tools through a standardized interface.

This guide explains how Reverera MCP Server provides AI agents with access to FlexNet Operations data through a standard interface, who can use this capability, how to configure it with different AI agents, how to troubleshoot common issues, and how to select and manage LLM models for AI agents.

- [Using AI Agents to Gain Insights from FlexNet Operations Analytics Data](#)
- [Setting Up an AI Agent to Access FlexNet Operations Data](#)
- [Selecting and Managing LLM Models for AI Agents](#)

Read-Only Access (No Data Changes)

When an AI agent connects to Reverera MCP Server, it can issue read-only queries through the Data Access API. Reverera MCP Server provides read-only access to the FlexNet Operations Analytics data warehouse but does not allow changes to FlexNet Operations data and does not provide access to Web Services APIs (no create, update, or delete operations).

Product Support Resources

The following resources are available to assist you:

- [Reverera Product Documentation](#)
- [Reverera Community](#)
- [Reverera Learning Center](#)
- [Reverera Support](#)

Reverera Product Documentation

You can find documentation for all Reverera products on the [Reverera Product Documentation](#) site:

<https://docs.reverera.com>

Reverera Community

On the [Reverera Community](#) site, you can quickly find answers to your questions by searching content from other customers, product experts, and thought leaders. You can also post questions on discussion forums for experts to answer. For each of Reverera's product solutions, you can access forums, blog posts, and knowledge base articles.

<https://community.reverera.com/s/>

Reverera Learning Center

The Reverera Learning Center offers free, self-guided, online videos to help you quickly get the most out of your Reverera products. You can find a complete list of these training videos in the Learning Center.

<https://learning.reverera.com>

Reverera Support

For customers who have purchased a maintenance contract for their product(s), you can submit a support case or check the status of an existing case by first logging into the [Reverera Community](#), clicking **Support** on the navigation menu to open the **Support Hub** page, and then clicking the **Open New Case** or **Case Portal** button.

Contact Us

Reverera is headquartered in Itasca, Illinois, and has offices worldwide. To contact us or to learn more about our products, visit our website at:

<http://www.reverera.com>

You can also follow us on social media:

- [Facebook](#)
- [LinkedIn](#)
- [YouTube](#)
- [Instagram](#)

Using AI Agents to Gain Insights from FlexNet Operations Analytics Data

Reverera MCP Server enables users to gain insights from FlexNet Operations Analytics data by allowing AI agents to answer questions in natural language rather than requiring users to navigate dashboards, build reports, or write queries.

This section introduces that approach by describing who it is intended for, the key benefits it offers, and best practices for asking effective questions.

The section also includes illustrative use cases and example questions with representative AI responses.

- [From Dashboards to AI Agents: A Fourth Way to Get Answers](#)
- [Example Use Cases for Accessing FlexNet Operations Data with AI Agents](#)
- [Example Questions and Representative AI Responses](#)



Note - Setup, configuration, and troubleshooting for connecting an AI agent to Reverera MCP Server are covered in [Setting Up an AI Agent to Access FlexNet Operations Data](#).

From Dashboards to AI Agents: A Fourth Way to Get Answers

Imagine a producer starting their day with a simple question: “Which customer’s usage increased this week?”

Until now, answering that question required choosing among several technical paths:

- **Analytics Dashboard**—Exploring curated charts, filters, and pre-built reports.
- **Data Access API-based apps**—Building or using internal reporting applications that call the FlexNet Operations Data Access API.
- **Snowflake data share**—Analyzing raw data directly in your own warehouse tools.

Each option works well, but all assume you know where the data lives, how fields are named, and which report or query to run.

A new, **fourth option** removes that complexity. Producers can now ask questions in plain, natural language through an AI assistant or agent:

- **Ask in everyday language**—No need to remember report names, SQL, or API field names.
- **AI agent translates the intent**—The agent converts the question into the appropriate Data Access API calls behind the scenes.

Another Way to Access Your Data — “Bring Your Own Agent”

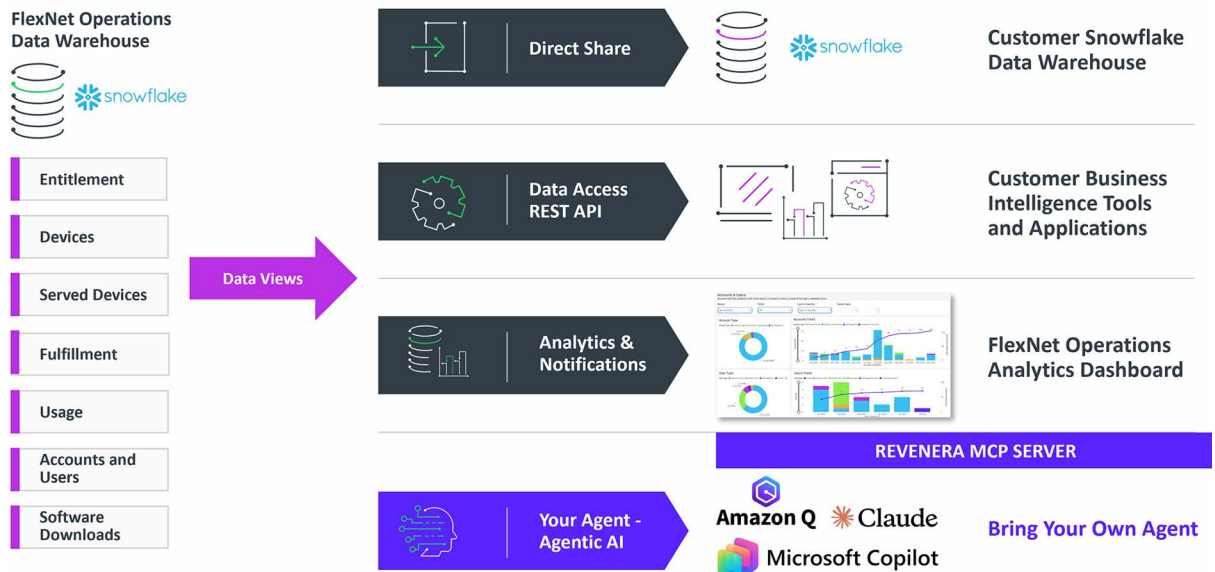


Figure 2-1: Using AI Agents with Revenera MCP Server

The system translates user intent into the appropriate calls behind the scenes—no SQL, no API field names, just questions and answers.

This is enabled by Revenera MCP Server, a hosted Model Context Protocol (MCP) server deployed in front of the FlexNet Operations Data Access APIs. Through Revenera MCP Server, AI agents such as **Microsoft Copilot**, **Amazon Q**, and **Claude** can securely connect, discover available tools, and query licensing and entitlement data on your behalf, while respecting all existing roles, permissions, and environments. For more information, see the following sections:

- [Who Should Use AI Agents to Access FlexNet Operations Data](#)
- [Key Benefits of Querying FlexNet Operations Analytics Data with AI Agents](#)
- [How to Ask Effective Questions When Using an AI Agent](#)
- [Security and Access Best Practices for AI Agents](#)

Who Should Use AI Agents to Access FlexNet Operations Data

AI agents are useful for a range of roles that need faster access to FlexNet Operations Analytics data without deep technical knowledge or manual analysis.

- **Business users** who want quick answers without navigating dashboards or reports.
- **Support and operations teams** that need to accelerate case resolution and usage analysis.
- **Admin and IT teams** responsible for enabling secure, governed AI access to FlexNet Operations data.

Key Benefits of Querying FlexNet Operations Analytics Data with AI Agents

Using AI agents to query FlexNet Operations Analytics data enables faster access to insights while reducing reliance on manual navigation, report building, or technical expertise.

- **Natural-language queries**—Ask questions without learning report interfaces or query syntax.
- **Instant insights**—Receive responses based on trusted FlexNet Operations Analytics data.
- **Secure by design**—Enforces existing FlexNet Operations roles and permissions.
- **Cross-platform ready**—Works across environments when appropriate credentials are provided.

How to Ask Effective Questions When Using an AI Agent

Although AI agents handle the technical complexity behind the scenes, the quality of the results still depends on how questions are phrased. Clear, specific input helps the agent return more accurate and relevant answers.

- **Be specific**—For example, “*Show entitlements expiring for product X*” is more effective than “*expiring entitlements*”.
- **Include filters when relevant**—Specify details such as product, account, version, region, or environment to narrow the scope.
- **Reference time frames clearly**—Use explicit ranges (for example, “*expiring in the next 30 days*”) to focus the results.

Security and Access Best Practices for AI Agents

Securing AI agent access to FlexNet Operations Analytics data requires careful control of permissions, credentials, and environments.

- **Least-privilege access**—Grant only the roles required for the AI agent’s intended use cases.
- **Token hygiene**—Rotate access tokens regularly and revoke them promptly when staff or responsibilities change. For more information, see [Rotate an access token](#) in the [FlexNet Operations API Reference](#).
- **Environment isolation**—Keep production and sandbox credentials separate to prevent cross-environment access.



Note - Detailed setup, authentication, and connection configuration steps are covered in [Setting Up an AI Agent to Access FlexNet Operations Data](#).

Example Use Cases for Accessing FlexNet Operations Data with AI Agents

This section provides illustrative use cases that demonstrate how AI agents can be used to query FlexNet Operations data and, in more advanced scenarios, combine insights across multiple systems.

- [Single-System Query Example](#)
- [Cross-System Query Example](#)

Single-System Query Example

This example shows how an AI agent can answer a natural-language question by querying data directly from the FlexNet Operations data warehouse.

The user asks a question in everyday language, and the agent translates that intent into the appropriate data queries and formats the response for presentation.

Use Case: Single System — FlexNet Operations

Retrieve all devices mapped to an Activation ID

Example

User:
"Retrieve all devices mapped to an Activation ID ACT-b2be-662F-274f-691, limit to 10 records for Dec 2025 to Jan 2026"

Device ID	Name	Last Seen
D-001	Edge-Gateway-01	2026-01-09 14:32Z
D-002	PLC-Alpha	2026-01-10 09:05Z
D-003	Robot-Cell-7	2026-01-12 18:21Z

Figure 2-2: Use Case: Single System - FlexNet Operations

Cross-System Query Example

In more advanced scenarios, an AI agent can orchestrate queries across multiple agent-enabled systems to provide a consolidated explanation.

This example illustrates how an agent could combine information from FlexNet Operations, CRM, and billing systems to diagnose an activation issue and summarize the results in a single response.

Use Case: Cross System

What is causing this customer's license activation to fail?

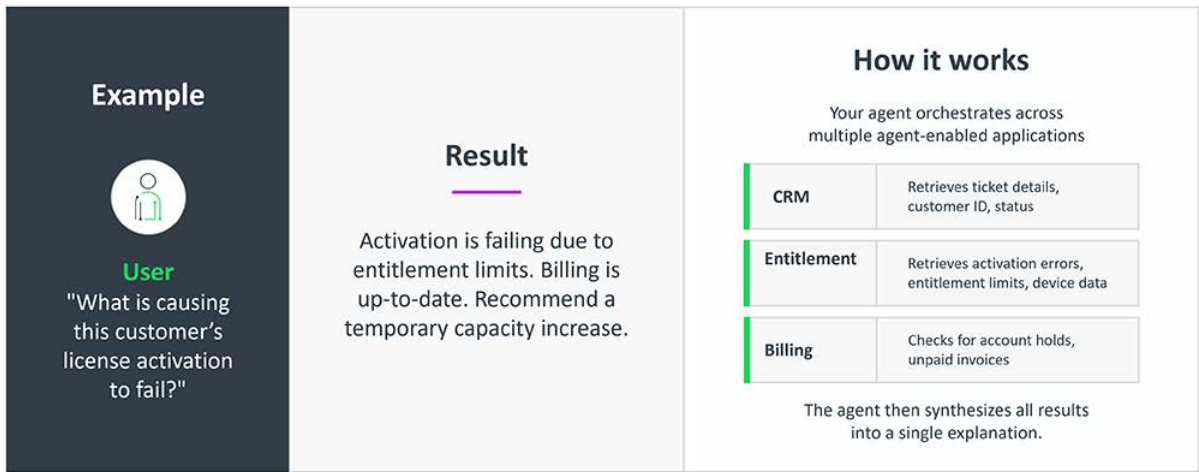


Figure 2-3: Use Case: Cross System

Example Questions and Representative AI Responses

The following examples show questions submitted through an AI agent connected to FlexNet Operations data warehouse, along with representative AI-generated responses.

- [Account Report](#)
- [Usage Report](#)
- [Device Report](#)
- [High Usage Customers Analysis](#)
- [High Usage Products Analysis](#)

Account Report

Prompt

Get me account report for past 5 days in table format.

Account Report for Past 5 Days

Here is the **Account Report for Past 5 Days** in table format.

ID	Account ID	Account Name	Account Type	Country	City	State	Created Date	Last Updated
2000001038617	Northwind	Northwind Solutions	CUSTOMER	US	-	-	2026-02-10 06:53:22	2026-02-10 06:53:22
2000001038616	BlueRidge	Blue Ridge Technologies	CUSTOMER	US	-	-	2026-02-10 06:52:50	2026-02-10 06:52:50
2000001038621	Harborview	Harborview Analytics	CUSTOMER	US	Chicago	IL	2026-02-10 21:14:30	2026-02-10 21:14:30
2000001038622	Lakeshore	Lakeshore Financial Group	CUSTOMER	US	Chicago	IL	2026-02-10 21:24:12	2026-02-10 21:24:12
2000001038625	SummitWorks	SummitWorks Consulting	CUSTOMER	US	-	-	2026-02-11 21:22:03	2026-02-11 21:22:03
2000001038658	ApexDigital	Apex Digital Services	CUSTOMER	US	-	-	2026-02-12 10:09:56	2026-02-12 10:09:56

Usage Report

Prompt

Get me usage report for 2025. Limit to 20 records in tabular format; also give an analysis.

Usage Report for 2025

Here is the report generated by the prompt.

Account	Consumer	Item	Version	Meter Type	Quantity	Used	Entitled	Instance	Usage Date
GraceNet	DataService	S1	1.0	concurrent	0	1	2	LMXSRV01	2025-03-08
GraceNet	DataService	S2	2025.05	concurrent	0	1	2	LMXSRV01	2025-05-16
Harborview	Pro-Viewer	SF2	2025.05	concurrent	0	1	3	XSRVPROD02	2025-05-21
SummitWorks	SurveyEngine	Survey	1.0	concurrent	0	1	1	XSRVSURVEY01	2025-05-21

Usage Analysis for 2025

Here is the analysis generated by the prompt.

Report Summary

- **Total Records:** 48 usage records (showing top 20)
- **Time Range:** January 2025 – February 2026
- **Report Generated:** February 13, 2026
- **Pages:** 3 total pages available

Key Insights

Account Distribution

- **SummitWorks:** 65% (13/20 records) – Most active account
- **Northwind:** 20% (4/20 records)
- **GraceNet:** 15% (3/20 records)

Top Consumers

- **Data Integration Service:** 65% of usage (13 records)
- **M. Reynolds:** 25% of usage (5 records)
- **Pro-Viewer:** 10% of usage (2 records)

Most Used Items

- **Core Analytics v1.0:** 80% (16 records) – Primary feature usage
- **Streaming Features (SF2/SF1):** 15% (3 records) – Secondary features
- **Usage Survey Module:** 5% (1 record each) – Minimal usage

Meter Types

- **Concurrent:** 70% of usage patterns
- **Unmetered:** 30% (simple access requests)

Usage Patterns

- **Peak Activity:** February 21, 2025 (15 records)
- **License Utilization:** Efficient usage with most items showing 1/10 or 1/2 ratios
- **Response Codes:** Mix of successful completions and specific service responses (12, 15)

Device Report

Prompt

Retrieve all devices using Basic_Paint. Limit to 10 records for Nov 2025 to Jan 2026 in tabular format.

Device Report

Here is the report generated by the prompt..

ID	Device ID	Device Name	Account	Status	License Status	Qty on Device	Product Version	Expiration Date	Last Modified	Site
200000132911	W9WK0T1 YR_RUHP	W9WK0T1 YR_RUHP	Northwind Retail Group	ACTIVE	LICENSE_ GENERATED	20	1.0	2025-12-31	2026-01-12 10:14:44	1102-63266 37-site
2000001355071	4965974 BY67	Rbosch_C MAP_Analytics	Barry Photo Studio	ACTIVE	LICENSE_ GENERATED	5	1.0	2027-05-19	2025-12-05 02:16:47	-
2000001355071	4965974 BY67	Rbosch_C MAP_Analytics	Barry Photo Studio	ACTIVE	LICENSE_ GENERATED	3	1.0	2025-12-31	2025-12-05 02:16:47	-

High Usage Customers Analysis

Prompt

Give me customers with high usage.

High Usage Customers Analysis Report

Here is the report generated by the prompt..

Rank	Account Name	Usage Records	Total Quantities	Entitled Capacity	Usage Pattern
1	Summit Forge	25 records	25+ units	2-10 per feature	Heavy concurrent user
2	Blue Harbor Security	12 records	12+ requests	10,000+ capacity	Elastic token testing
3	Northwind Systems	8 records	100,003+ units	Unlimited	EXTREME USAGE
4	Drew Industries	3 records	3+ units	5 per feature	Moderate user
5	Apex Health	2 records	2 units	1 per feature	Light concurrent
6	Contoso	2 records	3 units	10,000+ capacity	Elastic testing
7	Gracewell Technologies	1 record	1 unit	1 per feature	Light user

Detailed High Usage Analysis

Here is the analysis generated by the prompt.

Extreme Usage Alert - Northwind Systems

- **Single Transaction:** 100,000 units on item "DualAxis Line"
- **Usage Pattern:** Metered licensing with unlimited consumption
- **Consumer:** M. Ionescu
- **Risk Level:** **CRITICAL** - Potential runaway usage

Top Volume Customers

1. Summit Forge (Highest Activity)

- **Usage Records:** 25 (52% of all usage)
- **Primary Users:** V. Dawson (17 records), M. Reynolds (8 records)
- **Popular Items:** FlexCore (concurrent), StreamFlow, UsageSurvey
- **Pattern:** Consistent concurrent licensing with 10-license pool
- **Status:** Efficient usage - good license utilization

2. Northwind Systems (Highest Volume)

- **Usage Records:** 8 records
- **Total Volume:** 100,003+ units








High Usage Products Analysis

Prompt

Get me a list of products with high usage.

High Usage Products Analysis Report

Here is the analysis generated by the prompt.

Rank	Product Name	Usage Records	Total Quantities	Peak Single Use	Usage Type	Status
1	FlexCore	28 records	100,028+ units	100,000	Concurrent/ Metered	 EXTREME
2	ElasticRate	12 records	15+ tokens	2 per session	Elastic	 High
3	StreamFlow	3 records	3+ units	1 per session	Concurrent	 Moderate
4	DualAxis Line	2 records	100,001+ units	100,000	Metered	 CRITICAL
5	Feature Release July	2 records	1 unit	1 per session	Concurrent	 Normal
6	MeterFlex	1 record	1 unit	1	Metered	 Light
7	StreamFlow Lite	1 record	1 unit	1	Unmetered	 Light

Detailed Product Usage Breakdown

Extreme Usage Products

Product "FlexCore" – TOP USAGE CHAMPION

- **Usage Frequency:** 28 records (58% of all usage)
- **Version:** 1.0
- **Total Consumption:** 100,028+ units
- **Peak Transaction:** 100,000 units (Customer101)

3

Setting Up an AI Agent to Access FlexNet Operations Data

This section describes how to configure AI agents to securely connect to FlexNet Operations Analytics data through Revenera MCP Server. It covers prerequisites, authentication options, and client-specific setup steps, along with guidance for testing connections and troubleshooting common issues.

- [Configuring AI Agents to Connect to Revenera MCP Server](#)
- [Testing the Connection to Revenera MCP Server](#)
- [Troubleshooting Common Issues with Revenera MCP Server](#)

Configuring AI Agents to Connect to Revenera MCP Server

To use natural-language questions with your FlexNet Operations data, your AI agent (Microsoft Copilot, Amazon Q, Claude) needs to connect to Revenera MCP Server through a simple authorization process.

This section describes how to configure the producer's AI agent to connect to Revenera MCP Server, enabling it to securely invoke Data Access API tools on your behalf.

- [Requirements and Prerequisites](#)
- [End-to-End Setup Flow for Connecting an AI Agent to Revenera MCP Server](#)
- [Authentication and Token Management](#)
- [Configuring an AI Agent Using Copilot Studio](#)

Requirements and Prerequisites

This section describes the prerequisites and configuration requirements for connecting an AI agent to FlexNet Operations Analytics data, including basic setup needs and engineering-defined security and access controls.

The following requirements define the access controls, identifiers, network conditions, and environment boundaries needed for an AI agent to successfully connect to FlexNet Operations Analytics data.

Item	Requirements
FlexNet Operations Credentials	FlexNet Operations credentials with appropriate access.
MCP Compatible Client	An MCP compatible client: Microsoft Copilot, Amazon Q, or Claude.
Reverera MCP Server URL	Reverera MCP Server URL (provided by your Support Department or your Administrator).
FlexNet Operations Roles and Permissions	A FlexNet Operations Publisher role is required. The FlexNet Operations Data Access REST APIs do not require any specific permissions

End-to-End Setup Flow for Connecting an AI Agent to Reverera MCP Server

The following diagram illustrates the high-level flow for configuring an AI agent to connect to Reverera MCP Server, from validating prerequisites through authentication, connection setup, and initial testing.

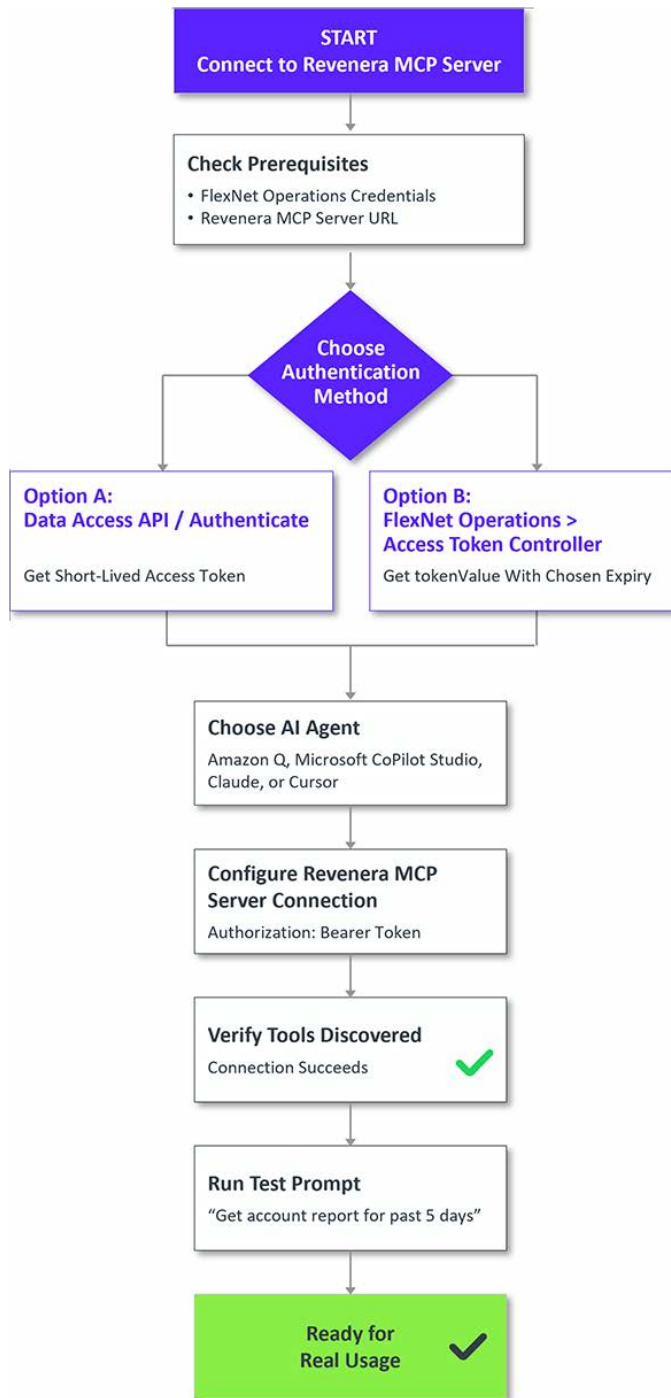


Figure 3-1: End-to-End Setup Flow for Connecting an AI Agent to Reverera MCP Server

The following table describes the items in the flow diagram.

Table 3-1 ▪ End-to-End Setup Flow for Connecting an AI Agent to Revenera MCP Server

Step	Description
Check Prerequisites	Verify that required prerequisites are in place, including FlexNet Operations credentials and the Revenera MCP Server URL.
Choose Authentication Method	Select how the AI agent will authenticate when connecting to Revenera MCP Server
Option A: Data Access API / Authenticate	Get a short-lived access token by calling the FlexNet Operations Data Access API authenticate endpoint.
Option B: FlexNet Operations > Access Token Controller	In FlexNet Operations, navigate to Accounts & Users > Manage Access Tokens to get a tokenValue with a chosen expiration.
Choose AI Agent	Select the AI agent that will be configured to connect to Revenera MCP Server.
Configure Revenera MCP Server Connection	Configure the MCP server connection, including the server URL and Authorization header using the bearer token.
Verify Tools Discovered	Confirm that the AI agent successfully connects to the Revenera MCP Server and discovers the available tools.
Run Test Prompt	Run a simple test query (for example, retrieving an account report for the past five days) to validate connectivity.
Ready for Real Usage	After successful testing, the AI agent is ready for regular usage.

Using Access Token Controller (Configurable Expiration)

To authenticate Revenera MCP Server using the access token controller authentication option, perform the following steps.

- [Obtaining an Access Token](#)
- [Entering the Access Token in the Agent](#)

Obtaining an Access Token

You can obtain an access token either using the FlexNet Operations Producer Portal or using REST API:

- [Obtaining an Access Token Using the FlexNet Operations Producer Portal](#)
- [Obtaining an Access Token Using REST API](#)

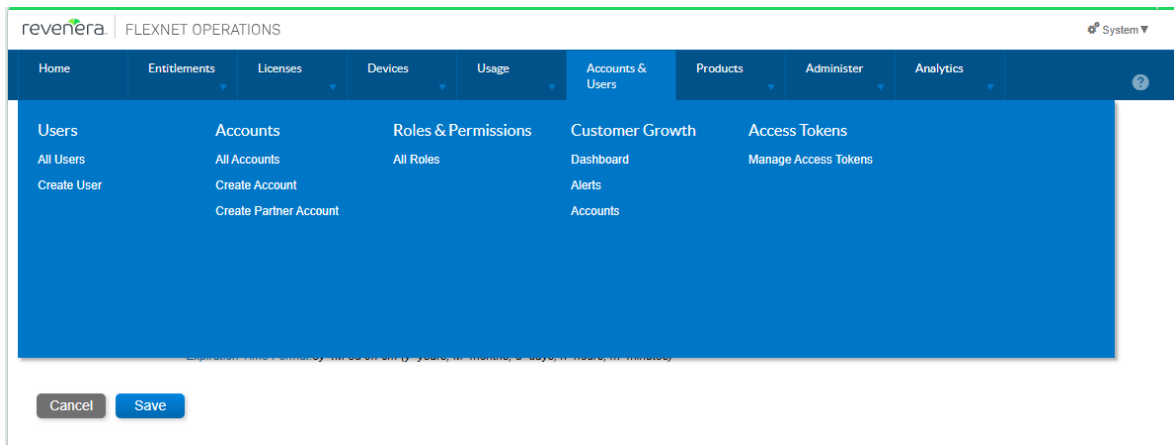
Obtaining an Access Token Using the FlexNet Operations Producer Portal

To obtain an access token using the FlexNet Operations Producer Portal user interface, perform the following steps:

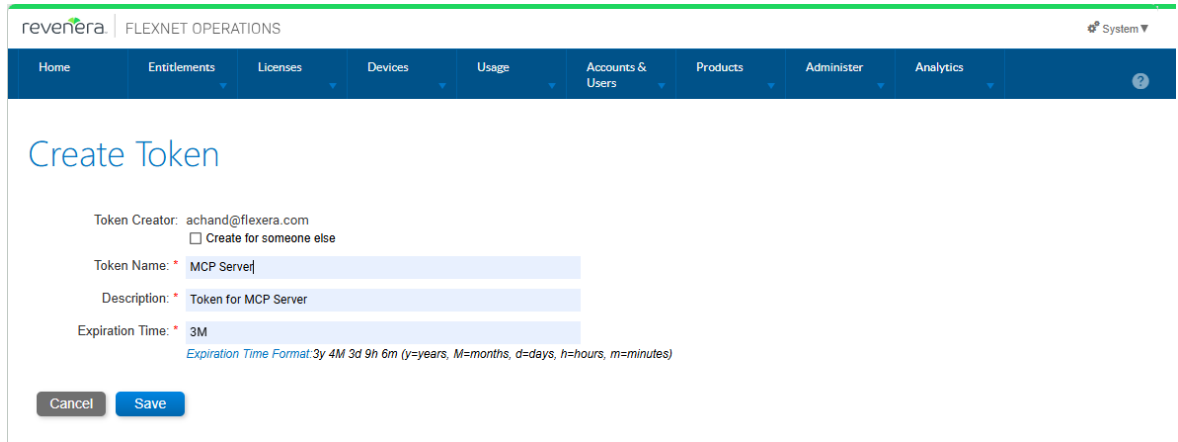


Task *To obtain an access token in FlexNet Operations:*

1. In FlexNet Operations, select **Accounts & Users > Manage Access Tokens**. The **Create Token** page opens:



2. On the **Create Token** page, enter a **Token Name**, **Description**, and **Expiration Time** using the format of:
3y 4M 3d 9h 6m (y=years, M=months, d=days, h=hours, m=minutes)



revera | FLEXNET OPERATIONS System

Home Entitlements Licenses Devices Usage Accounts & Users Products Administer Analytics

Create Token

Token Creator: achand@flexera.com
 Create for someone else

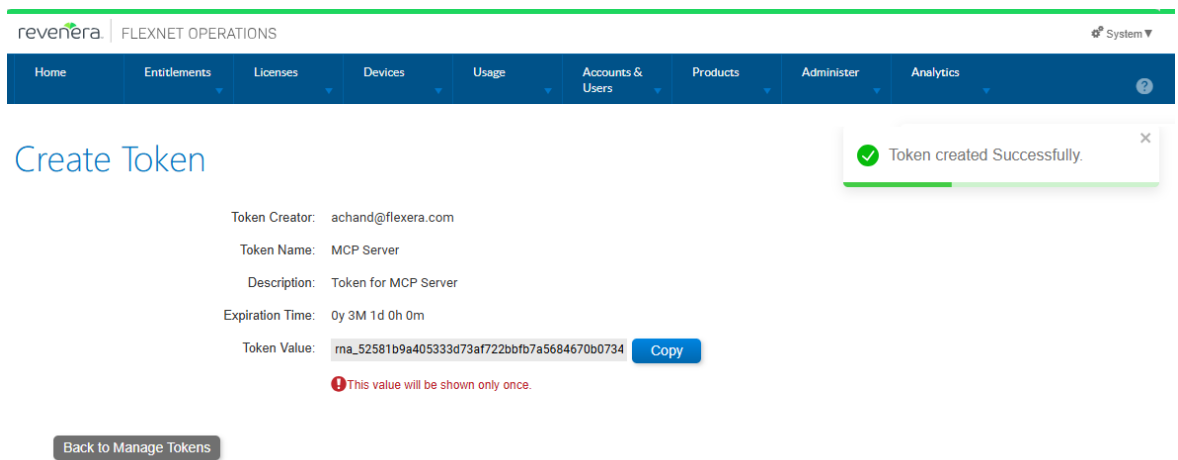
Token Name: * MCP Server

Description: * Token for MCP Server

Expiration Time: * 3M
Expiration Time Format: 3y 4M 3d 9h 6m (y=years, M=months, d=days, h=hours, m=minutes)

Cancel Save

3. Click **Save**. A success message is displayed and the **Token Value** field is populated.



revera | FLEXNET OPERATIONS System

Home Entitlements Licenses Devices Usage Accounts & Users Products Administer Analytics

Create Token

Token Creator: achand@flexera.com

Token Name: MCP Server

Description: Token for MCP Server

Expiration Time: 0y 3M 1d 0h 0m

Token Value: rna_52581b9a405333d73af722bbfb7a5684670b0734 Copy

This value will be shown only once.

Back to Manage Tokens

✔ Token created Successfully

4. Click **Copy** next to the **Copy Value** field and save the token value in a permanent location.



Important - The token value will be shown only once, so be sure to copy the value to a permanent location.

5. Continue with the steps in [Entering the Access Token in the Agent](#).

Obtaining an Access Token Using REST API

To obtain an access token using REST API, perform the following steps:



Task *To obtain an access token using REST API:*

1. Use the Access Token Controller REST API to obtain a token, as described in [Create an access token](#).
2. Provide the expiry for the token as desired.
3. Continue with the steps in [Entering the Access Token in the Agent](#).

Entering the Access Token in the Agent

Perform the following steps to enter the access token in the agent.



Task *To enter the access token in the agent:*

1. Obtain an access token, as described in [Obtaining an Access Token](#).
2. Copy the tokenValue to use in the Agent.

The screenshot shows a REST client interface with the following details:

- URL:** `https://flex1102-fno-uat.flexnetoperations.com/flexnet/uar/v1/token`
- Method:** `POST`
- Body Type:** `raw` (selected)
- Request Body (JSON):**

```
1 {
2   "expiryStr": "1y",
3   "tokenName": "TokenLongLived",
4   "tokenType": "NORMAL",
5   "username": "abc@test.com"
6 }
```
- Response Body (JSON):**

```
1 {
2   "statusMessage": "Successful",
3   "responseObject": {
4     "expiryStr": "1y",
5     "tokenName": "TokenLongLived",
6     "tokenType": "NORMAL",
7     "username": "A",
8     "tokenIssueMillis": 1771279181315,
9     "tokenExpiryMillis": 1802815181315,
10    "tokenCreator": "A",
11    "tokenValue": "A"
12  }
13 }
```

Configuring an AI Agent Using Copilot Studio

Copilot Studio provides a low-code way to configure an AI agent to connect to Revenera MCP Server. This approach allows users to ask natural-language questions and retrieve analytics data without building custom integrations.

If you already have a Model Context Protocol (MCP) server set up, you can connect it to your AI agent.

There are two ways to connect your AI agent to an MCP server in Copilot Studio:

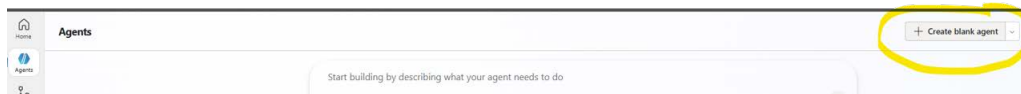
- **MCP Onboarding Wizard**—Add the MCP server in Copilot Studio using the *MCP Onboarding Wizard* (recommended)
- **Custom connector**—Create a custom connector to your server via Power Apps

To configure using the Copilot Studio, perform the following steps.

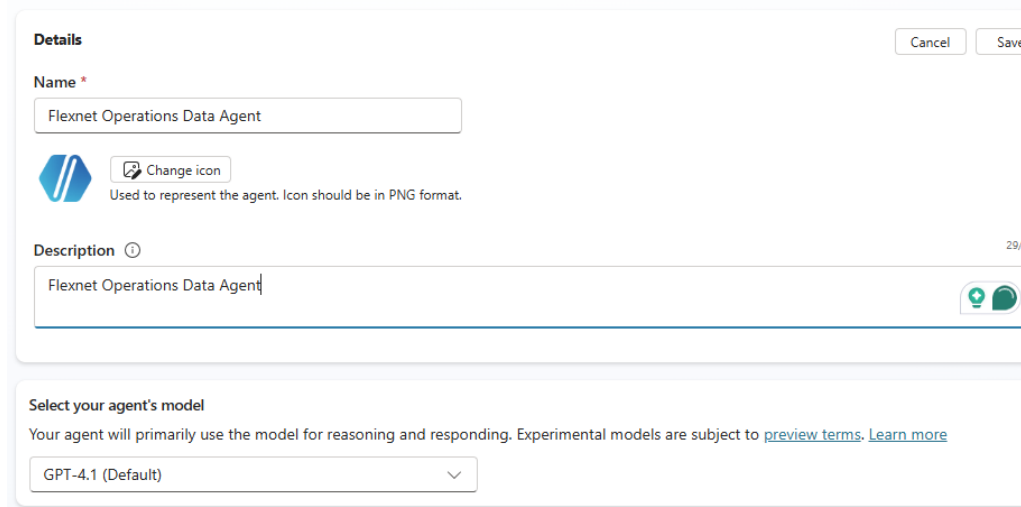


Task To configure access using Copilot Studio:

1. Click **Create blank agent**.



2. Name the agent, select an agent model, and click **Save**.






3. Open the **Tools** page for your agent.
4. Click **Add tool**.
5. Select **New tool**.

6. Select **Model Context Protocol**.

Add tool


Let your agent do more. [Learn more](#)

Create new

 Agent flow These predictable automations run the same way each time, giving you more control when you need it.	 Prompt Analyze and transform text, documents, images, and data, with natural language and AI reasoning.	 Model Context Protocol Open standard for connecting your agent to data, designed with AI in mind.
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

The **Model Context Protocol** Onboarding Wizard opens.

Add a Model Context Protocol server (Preview) ×



Model Context Protocol

Server name *

Server description *

Server URL ⓘ *

Enter the complete server path to continue

Authentication
 None API key OAuth 2.0

Create

7. Fill in the required fields:

- **Server name**—Name to identify the server.
- **Server description**—Enter a brief but clear description of what your MCP server does. The agent orchestrator uses this information to identify whether to call your server at runtime.
- **Server URL**—URL to the server.

8. Select the **Authentication** type for your MCP server, if applicable.

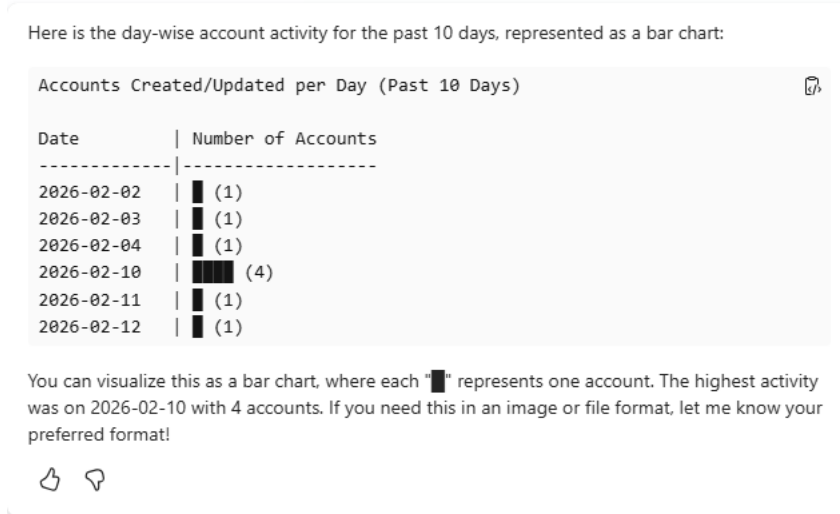
9. If you select **API key** under **Authentication**, the **Type** and **Header** name fields are displayed:

The screenshot shows a configuration form for an MCP Server. It includes the following fields and options:

- Server name ***: A text input field containing "Reverera MCP Server".
- Server description ***: A text area containing "Reverera MCP Server provides access to FlexNet Operations Analytics Data Warehouse." with a green dot at the end.
- Server URL ⓘ ***: A text input field containing "https://<URL>-uat.flexnetoperations.com/dapi/mcp". Below it is a note: "Enter the complete server path to continue".
- Authentication**: Three radio buttons: "None", "API key" (selected), and "OAuth 2.0".
- Type**: Two radio buttons: "Header" (selected) and "Query".
- Header name ***: A text input field containing "Authorization".
- Create**: A black button with white text at the bottom.

10. For **Type**, select the type of API key to use.
- **Header**—Select this option if your MCP server requires the API key in the request header.
 - **Query**—Select this option when the API key must be passed as a URL query parameter rather than an HTTP header. The key is appended to each request URL (for example, `?api_key=xxxxx`) and included with every request.
11. Click **Create**.
- Next, you need to create a connection to the MCP Server.
12. Create a new connection.
13. Enter the **Authorization Header** value, which contains the bearer token obtained from the Data Access/authenticate API.
14. Enter the value in this format: `Bearer <Token>`.
15. After the connection details are entered, click **Add**, then click **Configure**.
16. After successful configuration, you should be able to view the available tools in the Agent.
17. Once the connection is successful, the agent is ready to execute queries.

18. Fire an accounts report query and test the agent.



Testing the Connection to Reverera MCP Server

Use simple prompts to test your client's connection to the Reverera MCP Server you configured. For example, enter this prompt:

Get me the account report for the past 5 days in tabular format

You should see a report similar to this one entitled **Account Report for Past 5 Days**.

ID	Account ID	Account Name	Account Type	Country	City	State	Created Date	Last Updated
2000001038617	NORTHWIND01	Northwind Solutions	CUSTOMER	US	-	-	2026-02-10 06:53:22	2026-02-10 06:53:22
2000001038616	BLUERIDGE01	Blue Ridge Technologies	CUSTOMER	US	-	-	2026-02-10 06:52:50	2026-02-10 06:52:50
2000001038621	HARBORVIEW01	Harborview Analytics	CUSTOMER	US	Chicago	IL	2026-02-10 21:14:30	2026-02-10 21:14:30
2000001038622	BDO-USA	BDO USA	CUSTOMER	US	Chicago	IL	2026-02-10 21:24:12	2026-02-10 21:24:12
2000001038625	SUMMITWORKS01	SummitWorks Consulting	CUSTOMER	US	-	-	2026-02-11 21:22:03	2026-02-11 21:22:03
2000001038658	APEXDIGITAL01	Apex Digital Services	CUSTOMER	US	-	-	2026-02-12 10:09:56	2026-02-12 10:09:56

Troubleshooting Common Issues with Reverera MCP Server

The following provides troubleshooting tips for common issues encountered when using Reverera MCP Server.

Table 3-2 • Troubleshooting Common Issues

Issue Type	Troubleshooting Tip
Connection Issues	<ul style="list-style-type: none">• Verify the Reverera MCP Server URL is correct and reachable from your network.• Check VPN, firewall, and proxy settings that may block outbound connections.
Authentication Errors	<ul style="list-style-type: none">• Confirm credentials, token validity, and that JWT/PKCE settings match your client configuration.• Ensure the Authorization header uses a current Bearer token.
Empty or Unexpected Results	<ul style="list-style-type: none">• Confirm relevant data exists for your query and environment.• Verify your user role has permission to access the requested objects.

4

Selecting and Managing LLM Models for AI Agents

Reverera MCP Server supports integration with multiple LLMs. Selecting the appropriate model based on query complexity ensures an optimal balance between **accuracy, latency, and cost**.

Since Reverera MCP Server translates natural-language requests into actionable data queries, model selection directly impacts query correctness, response efficiency, and overall cost.

- [Simple Use Cases \(Low Complexity\)](#)
- [Medium Use Cases \(Moderate Complexity\)](#)
- [Complex Use Cases \(High Complexity\)](#)
- [Best Practice: Hybrid Model Strategy](#)
- [Handling Token Limitations for Complex Queries](#)

Simple Use Cases (Low Complexity)

Description

Straightforward queries with clear intent, minimal ambiguity, and limited data relationships.

Examples

- Show usage report for the last 10 days.
- List all entitlements for the ACME account that expire next quarter.
- List the top 10 customers using the ANC product.

Characteristics

- Single entity or dataset.
- Limited filtering or aggregation.
- No complex joins or derived logic.

Recommended Models

Lightweight / cost-efficient models such as Claude Haiku 4.5 and GPT 5.0 mini.

Why

- Faster response times.
- Lower cost per request.
- Sufficient accuracy for structured, well-defined queries.

Medium Use Cases (Moderate Complexity)

Description

Queries involving multiple conditions, aggregations, or moderate interpretation of user intent.

Examples

- Compare renewal rates across regions for the last quarter.
- Identify customers with declining usage in the last three months.
- List entitlements grouped by product with total usage.

Characteristics

- Multi-entity queries.
- Aggregations and grouping.
- Moderate ambiguity in user intent.

Recommended Approach

- Start with a lightweight model for initial processing.
- Escalate to higher-accuracy models when additional reasoning is required.

Recommended Models

- **Primary**—Claude Haiku 4.5, GPT-5 mini.
- **Escalation**—Higher accuracy models such as GPT-5.x, GPT-5.3 codex, and Claude Opus 4.5.

Why

- Optimizes cost while maintaining acceptable accuracy.
- Supports cases where interpretation complexity increases.

Complex Use Cases (High Complexity)

Description

Advanced analytical or exploratory queries that involve deeper reasoning or more nuanced interpretation.

Table 4-1 - Complex Use Case Queries

Persona	Intent	Sample Prompt
CSM	Awareness of at-risk accounts to take proactive action.	Identify churn risk patterns based on usage decline and entitlement changes over the past six months.
Product Manager	Analysis of a feature adoption to determine strategy.	Evaluate adoption of feature “X” across accounts over the past six months. Analyze which accounts demonstrate strong engagement and the average monthly usage per account and how is it trending over time.
Renewals	Identify cross-sell and up-sell opportunities.	From entitlements expiring in the next quarter, identify accounts where licenses have been utilized by over 95% of their entitlement. Provide related product and feature details as well.
Finance	Understand revenue trends using cross-system and cross-domain queries.	Analyze revenue decline in Europe during the last quarter using available data sources and provide a root cause.

Examples

- Identify churn risk patterns based on usage decline and entitlement changes.
- Analyze revenue decline in Europe last quarter.
- Find customers similar to ACME based on usage and renewal behavior.
- Perform cross-system queries across usage, billing, and CRM data.

Characteristics

- Multi-step reasoning.
- Derived metrics and nested logic.
- High ambiguity or business context interpretation.

Recommended Models

High-accuracy models, such as GPT 5.x, Claude Sonnet 4.6, and Claude Opus 4.7.

Why

- Superior natural language understanding.
- Better handling of ambiguity and reasoning.
- Higher query correctness and reliability.

Best Practice: Hybrid Model Strategy

For optimal performance and cost efficiency:

- Use **lightweight models as the default** for most queries.
- **Escalate to high-accuracy models** only when needed.
- Use **retry or fallback mechanisms** for ambiguous or failed queries.

The following is a summary of the best practice guidelines.

Table 4-2 ▪ Best Practice Guideline Summary

Use Case Complexity	Example	Recommended Model
Simple	Usage report, basic filters.	Lightweight models: <ul style="list-style-type: none">• Claude Haiku 4.5• GPT 5.0 mini.
Medium	Aggregations, multi-condition queries.	Hybrid (lightweight > high accuracy) <ul style="list-style-type: none">• GPT-5.x• Claude Opus 4.5• GPT 5.3 codex
Complex	Predictive insights, ambiguous queries	High-accuracy models. <ul style="list-style-type: none">• GPT-5.x• Claude Sonnet 4.6• Claude Opus 4.7

Handling Token Limitations for Complex Queries



Note • This section applies to advanced scenarios.

When executing complex or large-scale queries through Revenera MCP Server, users may encounter failures due to the context window (token limit) of the selected LLM during downstream processing. These limitations typically arise because responses are verbose in nature and are not pre-processed to optimize LLM consumption.

To address this constraint, it is recommended that publishers implement an intermediate orchestration layer within their own environment (for example, using Copilot Studio or equivalent tooling). This approach is a publisher-side enhancement and is not part of the Revenera-managed infrastructure.

Orchestration Layer Overview

The orchestration layer acts as an intelligent controller between the LLM and Revenera MCP Server, enabling efficient handling of large or complex queries. Its key responsibilities include:

- **Query decomposition**—Breaking down a complex user request into smaller, manageable sub-queries.
- **Iterative retrieval**—Sequentially retrieving data for each sub-query.
- **Incremental summarization**—Reducing the size of each response while preserving relevant insights.
- **Aggregation**—Combining summarized outputs into a coherent and compact representation.
- **Reasoning enablement**—Providing the LLM with concise, processed inputs suitable for analysis within token limits.

By ensuring that only compact, insight-ready summaries are passed to the LLM rather than full, verbose responses, this approach significantly improves scalability and reduces the likelihood of token overflow errors.

Processing Pattern

The recommended execution workflow can be summarized as shown below:

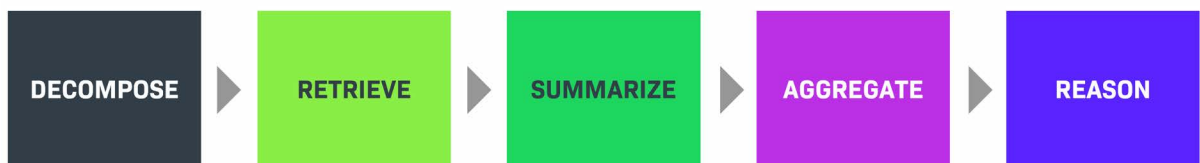


Figure 4-1: Recommended Query Processing Workflow

Adopting this orchestration pattern (Decompose > Retrieve > Summarize > Aggregate > Reason) allows publishers to reliably support large-scale analytical queries while operating within LLM constraints, without requiring any changes to the Revenera MCP Server itself.