

Installing Polycom HDX Software and Options



By upgrading your Polycom® software or by purchasing additional system options, your organization continues to benefit from the latest video conferencing technology. This document describes how to upgrade your software and system options.

To activate and install Polycom video software upgrades and options:

1. Collect your license numbers and system serial numbers.
2. Obtain key codes from the Polycom web site.
3. Download the software update file from the Polycom web site.
4. Install the software and options.

Each of these steps is described in the following sections.

Collecting License Numbers and System Serial Numbers

Make a note of your system serial number and license number. You will need to provide them in order to get the key codes that activate software upgrades and system options.

- The 14-digit *serial number* is the unique number that identifies your system. You can find it on the System Information screen and on a label on the back of the system.
- The *license number* is the number that you receive when you purchase a software upgrade or system option. License numbers have the following format:

Software upgrade license: U1000-0000-0000-0000-0000

System option license: K1000-0000-0000-0000-0000



If your software upgrades are covered by a software warranty or service agreement and you did not purchase additional system options, you only need to provide a serial number.

If you are running a major or minor software version (*x.y*), you can upgrade to a patch version (*x.y.z*) without a license.

If you want to upgrade multiple systems, you can obtain key codes from Polycom for all of the systems at one time. To obtain multiple key codes for purchased software upgrades or system options, create a text file that contains the license numbers and serial numbers of the systems you want to upgrade.

To obtain multiple key codes for software upgrades covered by a software warranty or service agreement, create a text file containing a list of serial numbers only.



Use uppercase letters when you type the serial numbers.

Use this format for text files that contain license numbers and serial numbers:

```
license number<TAB>system serial number
```

For example, a text file with upgrade license numbers and serial numbers might look like this:

```
U1000-000-000-0000<TAB>82040903F01AB1
```

```
U1000-000-000-0000<TAB>82043604G18VR2
```

A text file with system option license numbers and serial numbers might look like this:

```
K1000-000-000-5001<TAB>82040903F01AB1
```

```
K1000-000-000-5003<TAB>82043604G18VR2
```

A text file with serial numbers might look like this:

```
82040903F01AB1
```

```
82043604G18VR2
```

Obtaining Key Codes for Software Upgrades and System Options

Before you run the software update, you need a key code. A *key code* is the number that activates software or options on a specific system. Polycom generates a key code when you submit the license number and system serial number information.

- A key code is valid only on the system for which it is generated.
- Software key codes are valid for the software release you are installing as well as for any patch releases that may later become available.
- Option key codes are valid across all software releases.

Obtaining Software and Option Key Codes for a Single System

To obtain software or option key codes for a single system:

1. On a computer, open Internet Explorer version 6.0 or later.
2. Log in at www.polycom.com/support/login.

Note that you will need to set up an account if you don't already have one.

3. Click **Activate Your Product**.
4. Do one of the following:
 - If your system is covered by a software warranty or service agreement, click **Retrieve Software Key Code**. Enter your system serial number and the version number of the software you want to install and click **Retrieve**.
 - If you purchased an upgrade license or system option, enter your system serial number and license number and click **Generate**.

The key code displays on the screen. Make a note of this number for use during installation.

Obtaining Software and Option Key Codes for Multiple Systems

To obtain software or option key codes for multiple systems:

1. On a computer, open Internet Explorer version 6.0 or later.
2. Log in at www.polycom.com/support/login.

Note that you will need to set up an account if you don't already have one.

3. Click **Activate Your Product**.
4. Click **Attach File**.
5. Browse to the text file that contains license numbers and serial numbers, or serial numbers only. These text files are described in [Collecting License Numbers and System Serial Numbers](#).

For each file you upload, Polycom returns a text file that contains the key codes. If you submit serial numbers only, the Key Code file is returned online. If you submit license numbers and serial numbers, the Key Code file is sent in email.

The Key Code file uses this format:

```
License Number<TAB>Serial Number<TAB>Option Key Code
```

The following example shows a Software Key Code file:

```
U1000-0000-0000-0000-0003<TAB>82041003E070B0<TAB>U8FB-0D4E-6E30-0000-0009  
U1000-0000-0000-0000-0004<TAB>820327024193AK<TAB>U982-4507-5D80-0000-0009
```

The following example shows an Option Key Code file:

```
K1000-0000-0000-0000-0001<TAB>82041003F082B1<TAB>K15B-DC2D-E120-0000-0009  
K1000-0000-0000-0000-0002<TAB>82041503E093B0<TAB>K27E-30F9-2D20-0000-0009
```

The following example shows a Software Key Code file for systems covered by a software warranty or service agreement:

```
U<TAB>82041003F082B1<TAB>U7B6-698E-1640-0000-02C1  
U<TAB>82041503E093B0<TAB>UCC1-C9A6-FE60-0000-02C1  
U<TAB>82041003E070B0<TAB>UEC6-FDA0-8F00-0000-02C1  
U<TAB>820327024193AK<TAB>U7B7-D6BD-3610-0000-02C1
```

Activating Options on the System

If you want to activate system options without upgrading your software, you do not need to download software or run the software update. To activate system options on a single system, go to **System > Admin Settings > General Settings > Options** and enter the option key.

Downloading the Software

1. On a computer, open Internet Explorer version 6.0 or later.
2. Go to www.polycom.com/support.
3. Navigate to your product software.
4. Download the appropriate software release.

Installing Software and Options

Installing a Software Upgrade and System Options on a Single System

To update system software using the Polycom HDX Web Interface:

1. On a computer, open Internet Explorer version 6.0 or later.
2. In the browser address line, enter the system's IP address, for example, `http://10.11.12.13`, to go to Polycom HDX web interface.
3. Go to **Admin Settings > General Settings > Software Update**, and follow the instructions on the screen.

To update system software using the USB port on a Polycom HDX system:

After version 2.0 or later is installed on a Polycom HDX system, future software installations can be initiated using the USB port on the system.

1. Save a single software package (.pup) file and a single key code (.txt) file to the root of a USB storage device.
2. Insert the USB storage device into the USB port on the system.
3. A prompt appears for installing the software found on the USB device.
4. Follow the instructions on the screen.
5. If you choose to cancel the installation, you can install the software at a later time by pressing **Option** on the remote control or keypad and selecting **Software Update**.

Using the Polycom CMA™ System to Upgrade Multiple Systems

For information about using the Polycom Converged Management Application™ (CMA™) system to perform automatic or scheduled software updates on multiple Polycom HDX systems, refer to the *Polycom CMA System Operations Guide* available at www.polycom.com.

Using Polycom Global Management System™ to Upgrade Multiple Systems

If your organization uses the Polycom Global Management System™ to manage systems on your network, you can use it to upgrade multiple systems.



Global Management System version 7.1.8 software supports all Polycom HDX software versions through version 2.5.

Global Management System software versions prior to 7.1.8 do not support the new software update method required for Polycom HDX version 2.5 or later software.

1. Concatenate the Software Key Code file and the Option Key Code file to create a single text file that contains all of your key codes for software and options. You can do this by opening both files with a text editor (such as Notepad) and copying the contents of one file to the end of the other file. Then, save the combined file.

The following example shows a tab-delimited, concatenated key code file:

```
K1000-0000-0000-0000-0001 82041003F082B1 K15B-DC2D-E120-0000-0009
K1000-0000-0000-0000-0002 82041503E093B0 K27E-30F9-2D20-0000-0009
K1000-0000-0000-0000-0003 82041003E070B0 K8FB-0D4E-6E30-0000-0009
K1000-0000-0000-0000-0004 820327024193AK K982-4507-5D80-0000-0009
U      82041003F082B1      U7B6-698E-1640-0000-02C1
U      82041503E093B0      UCC1-C9A6-FE60-0000-02C1
U      82041003E070B0      UEC6-FDA0-8F00-0000-02C1
U      820327024193AK      U7B7-D6BD-3610-0000-02C1
```

2. Log on to the Global Management System screen.
3. Click **Software Update**.
4. Click **Configure SoftUpdate**.
5. Choose the Device Type and model, and click **Upload**.
6. Enter the following information, and then click **OK**.

Setting	Description
Update requires key file	Specifies that the upgrade requires a key code for each software and option upgrade.
Software update file to upload	Specifies the location of the software file to upload.
Software update key file to upload	Specifies the location of the concatenated Key Code file you created in step 1 of this procedure.
Description for uploaded file	Optional information about the Key Code file.

7. Navigate to the software update page. Select the systems to update and specify when the update should occur.

Using Polycom ReadManager® to Upgrade Multiple Systems

If your organization uses the Polycom ReadManager® platform to manage systems on your network, you can use it to upgrade multiple systems.



ReadManager SE200 version 3.0.6 software supports all Polycom HDX software versions through version 2.5.

ReadManager SE200 versions prior to 3.0.6 do not support the new software update method required for Polycom HDX version 2.5 or later software.

1. Concatenate the Software Key Code file and the Option Key Code file to create a single text file that contains all of your key codes for software and options. You can do this by opening both files with a text editor (such as Notepad) and copying the contents of one file to the end of the other file. Then, save the combined file.

The following example shows a tab-delimited, concatenated Key Code file:

K1000-0000-0000-0000-0001	82041003F082B1	K15B-DC2D-E120-0000-0009
K1000-0000-0000-0000-0002	82041503E093B0	K27E-30F9-2D20-0000-0009
K1000-0000-0000-0000-0003	82041003E070B0	K8FB-0D4E-6E30-0000-0009
K1000-0000-0000-0000-0004	820327024193AK	K982-4507-5D80-0000-0009
U	82041003F082B1	U7B6-698E-1640-0000-02C1
U	82041503E093B0	UCC1-C9A6-FE60-0000-02C1
U	82041003E070B0	UEC6-FDA0-8F00-0000-02C1
U	820327024193AK	U7B7-D6BD-3610-0000-02C1

2. Download the software update from the Polycom web site.
3. In the ReadManager interface, select **Directory Setup > Software Update Profiles**.
4. Edit each software upgrade profile to specify the location of the software and of the key file, if one is required. Click **OK**.
5. Select **Directory Setup > Software Update**.
6. Select the devices you want to upgrade, and click **Update**.
7. Specify when the upgrade should occur, and click **OK**.

For information about updating system software using the Polycom ReadManager solution, refer to the *Polycom ReadManager Administrator's Guide* available at www.polycom.com.

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