Installing Software and Options for the Polycom® RealPresence® Group Series and Accessories

By upgrading your Polycom software or by purchasing additional system options, your organization continues to benefit from the latest video conferencing technology.

Overview

This document describes how to update your Polycom® RealPresence® Group system software and system options. It also includes information on how to update your Polycom Touch Control.

> If you need to update your RealPresence Group system and Polycom Touch Control, complete your updates in this order:
>
> **1** Polycom RealPresence Group system (which includes the Polycom EagleEye Director update)
>
> **2** Polycom Touch Control

Polycom RealPresence Group System Software Updates

You can configure the RealPresence Group system to get software updates using any of the following methods:

- The online software server hosted by Polycom

- A USB storage device that you connect to the RealPresence Group system

- A server on your network

- A Polycom Converged Management Application™ (CMA®) system running version 6.2 or later

- A Polycom RealPresence® Resource Manager system running version 7.1 or later

For additional details on RealPresence Group Series hardware and software compatibility, see the appropriate version of the *Release Notes for the Polycom RealPresence Group Series* available at support.polycom.com.

Before installing and activating the software updates and options:

1 Collect your license numbers and system serial numbers.

2 Obtain key codes through the Polycom web site.

For more information about updating your Polycom RealPresence Group system, refer to Updating Polycom RealPresence Group System Software and Options on page 3.

Polycom EagleEye Director Software Updates

Updates to EagleEye Director software are included with the RealPresence software updates. To update your EagleEye Director, connect it to the RealPresence system before you run a software update. The software update program detects the EagleEye Director and updates it if necessary. EagleEye Director must have software version 2.0.0 or later installed to work with RealPresence Group systems running version 4.0.0.

No license number or key code is needed to update the Polycom EagleEye Director.

Polycom Touch Control Software Updates

In order to work with a RealPresence Group system running version 4.0.0, the Polycom Touch Control must have operating system software version 4.0.0 or later and panel software version 4.0.0 or later. No license number or key code is needed to update the Polycom Touch Control.

You can configure the Polycom Touch Control to get software updates using any of the following methods:

• The online software server hosted by Polycom

• A USB storage device that you connect to the side of the Polycom Touch Control

• A server on your network

• A Polycom Converged Management Application (CMA) system running version 6.2 or later

• A Polycom RealPresence Resource Manager system running version 7.1 or later

For more information about updating the Polycom Touch Control, refer to

Updating Polycom RealPresence Group System Software and Options

Preparing for RealPresence Group System Software Updates

Be aware of these points regarding installing RealPresence Group system upgrades:

- If you did not purchase additional system options, you only need to provide a serial number to activate the software.

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

- If the software has had a major or minor upgrade, you need a key code to get the new software.

Contact an authorized Polycom dealer to get a license and then activate the license on support.polycom.com to obtain an upgrade key.

RealPresence Group systems perform several internal restarts while running a Software Update. Each restart takes about 2 or 3 minutes. This process improves the reliability of the update process by freeing up memory while performing the update. If you are updating a RealPresence Group system using a web browser, the internal restart is not visible from the web interface.

Collecting System Information for Your RealPresence Group System Update

Before updating your system, make sure you have any necessary serial numbers, license numbers, and key codes.

Serial and License Numbers

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

- The *license number* is the number that you receive when you purchase a software update or system option. License numbers have the following format:

Software update license: U1000-0000-0000-0000-0000

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

If you want to update 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 updates or system options, create a text file that contains the license numbers and serial numbers of the systems that you want to update.

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

Serial numbers are case sensitive.

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 update 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 only serial numbers might look like this:

```
82040903F01AB1
```

```
82043604G18VR2
```

Key Codes

To activate options or perform a major or minor software update, obtain a key code before you run the software update. A *key code* is the number that activates software or options on a specific system.

- 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.

You need an account on support.polycom.com before you begin. Be sure to set up an account if you don't already have one.

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

1 On a computer, open a browser and navigate to support.polycom.com.

2 Under Licensing & Product Registration, click **Activation/Upgrade**.

3 Log in to your account.

4 Click **Site & Single Activation/Upgrade**.

   Follow the onscreen instructions to request the key code. Make a note of this number for use during installation.

To obtain software or option key codes for multiple RealPresence Group systems:

1 On a computer, open a browser and navigate to support.polycom.com.

2 Under Licensing & Product Registration, click **Activation/Upgrade**.

3 Log in to your account.

4 Do one of the following steps to receive serial number and key code combinations:

   — To update multiple systems not covered by a software warranty or service agreement, click **Batch Activation**.

   — To update multiple systems covered by a software warranty or service agreement, click **Batch Upgrade** and then select your product.

5 Follow the onscreen instructions to submit the text file that contains license numbers and serial numbers, or serial numbers only. These text files are described in Serial and License Numbers on page 3.

For each file you upload, Polycom returns a text file that contains the key codes.

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
```

To create a single text file for upgrading multiple RealPresence Group systems:

1   Concatenate the key code file and the option key code file you received from Polycom by following these steps:

   a   Open the key code files with a text editor, such as Notepad.

   b   Copy the contents of one file to the end of the other file.

   c   Save the combined file with a new name.

      You now have a single text file that contains all of your key codes for software and options.

2   Use the key codes and option key codes in the file to upgrade the applicable RealPresence Group systems.

Configuring Your Own Server to Update RealPresence Group System Software

You can post RealPresence Group system software to your web server and then configure the system to get updates there.

To set up your web server as the update site:

1   Make sure that your server allows clients to download files with the following extensions:

   –   .enc

   –   .txt

   –   .sig

2   Define a URL on your server that the RealPresence Group system can use for software updates, and create a corresponding root directory to it.

3   On a computer, open a browser and navigate to support.polycom.com.

4   Under **Documents and Downloads**, select **Telepresence and Video**.

5   Navigate to the page that has the desired update for the RealPresence
     Group system.

6   Save one software package (`.tar`) file and one key code (`.txt`) file from
     the Polycom web site to the root directory of the update site.

Installing a Software Update and System Options from the Polycom Server or Your Own Server

To manually install updates from the Polycom server or your web server:

1   On a computer, open Internet Explorer 9 on Windows 7 or Apple Safari
     on Mac OS X.

2   Configure the browser to allow cookies.

3   In the browser address line, enter the IP address of the RealPresence
     Group system using the format `http://IPaddress` (for example,
     `http://10.11.12.13`).

4   In the RealPresence Group system web interface, select **Admin Settings**.

     If necessary, enter the Admin ID as the user name (default is `admin`), and
     then enter the Admin remote access password, if one is set.

     The first time you open the web interface each day, you might need to
     enter a user name and password after you select any of the interface
     options.

5   Go to **General Settings > Software Updates.**

6   Under Software Server in the **Server Address** field, enter the path and
     address of the update site where you posted the RealPresence Group
     software, for example `http://10.11.12.100/rpgroup_repo`. To use the
     Polycom server, enter `polycom`.

7   Click **Check for Software Updates** to have the system detect updates.
     The system contacts the designated server to find available updates.

8   If the system indicates an update is available, click **Start Update** to install
     it.

9   When the Export Restrictions notice appears, click **Accept Agreement**.
     Follow the on-screen instructions to complete the update.

To automatically install updates from the Polycom server or your web server:

1   On a computer, open Internet Explorer 9 on Windows 7 or Apple Safari
     on Mac OS X.

2   Configure the browser to allow cookies.

3 In the browser address line, enter the IP address of the RealPresence Group system using the `http://IPaddress` (for example, `http://10.11.12.13`).

4 In the RealPresence Group system web interface, select **Admin Settings**.

If necessary, enter the Admin ID as the user name (default is `admin`), and then enter the Admin remote access password, if one is set.

The first time you open the web interface each day, you might need to enter a user name and password after you select any of the interface options.

5 Go to **General Settings > Software Updates.**

Under Software Server in the **Server Address** field, enter the path and address of the update site where you posted the RealPresence Group software, for example `http://10.11.12.100/rpgroup_repo`. To use the Polycom server, enter `polycom`.

6 Under **Automatic Software Updates**, select **Automatically Check for and Apply Software Updates**.

7 When the Export Restrictions notice appears, click **Accept Agreement**.

8 Specify the automatic update options:

   a Set the **Hour**, **Minute**, and **AM/PM** to specify the beginning of the time window within which the system checks for updates.

   b From the **Duration** list, select the length of the time within which the system can check for updates.

   After the **Start Time** and **Duration** settings are configured, the system calculates a random time within the defined update window at which to check for updates. It then checks for updates at this time on a daily basis as long as the **Start Time** and **Duration** values do not change. If the **Start Time** or **Duration** values change, a new random time within the new time window is calculated.

   c Click **Save**.

Installing RealPresence Group System Software from a USB Storage Device

You can use a USB storage device to update one or multiple RealPresence Group systems.

> When the Polycom RealPresence Group system is paired with a Polycom Touch Control, you cannot use the Polycom Touch Control USB port to update the RealPresence Group system software.

To update RealPresence Group system software on a single system using the USB port:

1   On a computer, open a browser and navigate to support.polycom.com.

2   Under **Documents and Downloads**, select **Telepresence and Video**.

3   Navigate to the page that has the desired update for the RealPresence Group system.

4   Save one software package (`.tar`) file and one key code (`.txt`) file from the Polycom web site to the root directory of a USB storage device.

5   Connect the USB storage device to the USB port on the back of the RealPresence Group system.

   The system detects the USB device and prompts you to confirm that you want to update the software.

6   Click **OK**. Follow the on-screen instructions to complete the update.

To update RealPresence Group system software on multiple systems using the USB port:

1   Copy the key codes for each system that you want to update to the key code `.txt` file on the root directory of a USB storage device.

2   On a computer, open a browser and navigate to support.polycom.com.

3   Under **Documents and Downloads**, select **Telepresence and Video**.

4   Navigate to the page that has the desired update for the RealPresence Group system.

5   Save one software package (`.tar`) file obtained from the Polycom web site to the root directory of the USB storage device.

6 Connect the USB storage device to the USB port on the back of a RealPresence Group system.

The system detects the USB device and prompts you to confirm that you want to update the software.

7 Click **OK**. Follow the on-screen instructions to complete the update. When the process complete, update each remaining system.

Installing RealPresence Group System Software from a CMA or RealPresence Resource Manager System

If you expect to implement the RealPresence Resource Manager system multi-tenancy feature, refer to the *Polycom RealPresence Resource Manager System Operations Guide* for more information about this feature before updating the RealPresence Group systems.

You can use a Polycom CMA system version 6.2 or later or a RealPresence Resource Manager system version 7.1 or later to update multiple endpoint systems after you complete the steps in Collecting System Information for Your RealPresence Group System Update on page 3.

For more information about updating system software in dynamic mode, setting an automatic software update policy, and testing a trial version software update package, refer to the *Polycom CMA System Operations Guide* or the *Polycom RealPresence Resource Manager System Operations Guide* available at support.polycom.com.

Activating Options on the Polycom RealPresence Group System

If you want to activate Polycom RealPresence Group 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:

1 On a computer, open Internet Explorer 9 on Windows 7 or Apple Safari on Mac OS X.

2 Go to the RealPresence Group system web interface.

3 Navigate to **Admin Settings > General Settings > Options**.

4 Enter the option key and click **Save**.

The checkboxes are selected for the options you activated.

Updating Polycom Touch Control Software

The Polycom Touch Control must be running operating system software version 4.0.0 or later and panel software version 4.0.0 or later in order to function properly with the RealPresence Group system. Use the following version guidelines when updating the Polycom Touch Control software:

- If you are running version 1.5 or earlier, install the operating system software before installing the panel software.

- If you are running version 1.6, install the updates in any order.

You might need to update your RealPresence Group system at the same time you update the Polycom Touch Control. If the RealPresence Group system software needs to be updated, update it before you update the Polycom Touch Control. For more information about updating your RealPresence Group system, refer to Updating Polycom RealPresence Group System Software and Options on page 3. For additional details on RealPresence Group Series hardware and software compatibility, see the appropriate version of the *Release Notes for the Polycom RealPresence Group Series* available at support.polycom.com.

Update files for the Touch Control software are located on the Polycom support server. You can also store Polycom Touch Control update files on a USB device, a CMA or RealPresence Resource Manager system, or on your own web server.

When checking for software updates, the Polycom Touch Control first checks for the presence of a USB storage device. The system lists available Polycom Touch Control updates.

Configuring Your Own Server to Update Touch Control Software

You can post Polycom Touch Control software to your web server and then configure the Polycom Touch Control devices to get updates there.

To set up your web server as the update site:

1   Make sure that your server allows clients to download files with the following extensions:

–   `.tar.gz`

–   `.txt`

–   `.sig`

2   Define a URL on your server that the Polycom Touch Control can use for software updates, and create a corresponding root directory to it.

3   Go to support.polycom.com, and navigate to the page for the Polycom RealPresence Group system that you use with the Polycom Touch Control.

4 Download the latest version of these distribution packages to your hard drive:

   — Polycom Touch Control Operating System

   — Polycom Touch Control Panel Software

5 Extract all contents of the files you downloaded to the root directory of the web server.

   When extracting multiple distribution packages, a pop up message might appear asking if you want to overwrite certain files that already exist. Select **Yes to All**.

6 Open a command line interface, and enter the command appropriate for your operating system:

   — Unix or Linux: `<root dir>/dists/venus/geninfo.sh`

   — Windows: `<root dir>\dists\venus\geninfo.bat`

7 Follow the steps described in Installing Touch Control Software from the Polycom Server or Your Own Server on page 13 to automatically or manually update the Polycom Touch Control software.

Managing Touch Control Software Versions on Your Server

When checking for software updates on your server, the Polycom Touch Control checks only for what is referred to as the "current" release of the operating system and panel software. By default, the current release comprises the operating system and panel software distribution package that was most recently extracted on your server.

Over time, you might extract other versions of the operating system and panel software on your server, resetting the current release with every extraction. In addition, you will accumulate multiple versions of the same software. Each software distribution package contains two commands, `setcurrel` and `removerel`, that you can use to maintain all of the Polycom Touch Control software extracted on your server.

`setcurrel`
This command sets a specific version of a software release as the current release.

• For *panel* software, run the appropriate `setcurrel` command with no parameters, and follow the command's instructions for selecting the current release:

   — Unix or Linux: `<root dir>/dists/venus/HDXctrl/setcurrel.sh`

   — Windows: `<root dir>\dists\venus\HDXctrl\setcurrel.bat`

- For *operating system* software, run the appropriate `setcurrel` command, with no parameters, and follow the command's instructions for selecting the current release:
    - Unix or Linux: `<root dir>/dists/venus/platform/setcurrel.sh`
    - Windows: `<root dir>\dists\venus\platform\setcurrel.bat`

`removerel`
This command removes a specific version of a software release from your server.

- For *panel* software, run the appropriate `removerel` command with no parameters, and follow the command's instructions for removing a specific release from your server:
    - Unix or Linux: `<root dir>/dists/venus/HDXCtrl/removerel.sh`
    - Windows: `<root dir>\dists\venus\HDXCtrl\removerel.bat`

- For *operating system* software, run the appropriate `removerel` command with no parameters, and follow the command's instructions for removing a specific release from your server:
    - Unix or Linux: `<root dir>/dists/venus/platform/removerel.sh`
    - Windows: `<root dir>\dists\venus\platform\removerel.bat`

Installing Touch Control Software from the Polycom Server or Your Own Server

To automatically install updates from the Polycom server or your own server:

1 From the Home screen, touch **Administration** and then touch **Updates**.

2 Enter the path and address of the update site where you posted the Polycom Touch Control software in the in the **Server Address** field. To use the Polycom server, enter `polycom`. The field is not case sensitive.

3 Enable **Automatically Check for Updates**.

4 When the Export Restrictions notice appears, touch **Accept Agreement**.

5 Specify the automatic update options:

  a Touch **Hour**, **Minute**, and **AM/PM** to specify the beginning of the time window within which the Polycom Touch Control checks for updates.

  b Touch **Duration** to select the length of the time within which the Polycom Touch Control can check for updates.

After the **Start Time** and **Duration** settings are configured, the Polycom Touch Control calculates a random time within the defined update window at which to check for updates. It then checks for updates at this time on a daily basis as long as the **Start Time** and **Duration** values do not change. If the **Start Time** or **Duration** values change, a new random time within the new time window is calculated.

c Touch **Action for Available Software Updates** and select whether to be notified of available status updates only or to download and install software when updates are available.

To manually install updates from the Polycom server or your own server:

1 From the Home screen, touch [icon] **Administration** and then touch **Updates**.

2 Enter the path and address of the update site where you posted the Polycom Touch Control software in the in the **Server Address** field. To use the Polycom server, enter `polycom`. The field is not case sensitive.

3 Touch **Check for Software Updates**.

4 Select only the updates that you want to install.

5 Touch **Download and Install Software**.

6 When the Export Restrictions notice appears, touch **Accept Agreement**. Follow the on-screen instructions to complete the update.

Installing Touch Control Software from a USB Storage Device

You can use a USB storage device to update Polycom Touch Control software.

To update Touch Control software using a USB port:

1 On a computer, open a browser and navigate to support.polycom.com.

2 Under **Documents and Downloads**, select T**elepresence and Video**.

3 Navigate to the page for the Polycom RealPresence Group system that you use with the Polycom Touch Control.

4 Download the latest version of these distribution package files to your hard drive:

— Polycom Touch Control Operating System

— Polycom Touch Control Panel Software

5 Extract all contents of the files you downloaded to the root directory of the USB device.

When extracting multiple distribution packages, a pop up message might appear asking if you want to overwrite certain files that already exist. Select **Yes to All**.

6 Connect the USB device to the side of the Polycom Touch Control.

7 From the Home screen, touch [icon] **Administration** and then touch **Updates**.

8 Touch **Check for Software Updates**.

9 Select only the updates that you want to install.

10 Touch **Download and Install Software**.

11 When the Export Restrictions notice appears, touch **Accept Agreement**. Follow the on-screen instructions to complete the update.

Installing Polycom Touch Control Software from a CMA or RealPresence Resource Manager System

You can post Polycom Touch Control software to a CMA system running version 6.2 or later or a RealPresence Resource Manager system running version 7.1 or later. Then, configure the Polycom Touch Control to get updates from the applicable system by entering the Production URL or Trial URL on the Polycom Touch Control Update screen.

For information about configuring production and trial versions of software update packages, refer to the *Polycom CMA System Operations Guide* or the *Polycom RealPresence Resource Manager System Operations Guide* available at support.polycom.com.

To automatically or manually update the Polycom Touch Control software, follow the steps described in Installing Touch Control Software from the Polycom Server or Your Own Server on page 13.

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