

Installing Polycom® V Series and VSX® Software and Options



By installing Polycom® software or by purchasing additional system options, your organization continues to benefit from the latest video conferencing technology. This document describes how to install software and system options over IP on single or multiple systems and how to install software over ISDN on single systems.

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Installing Software and Options Over IP

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 installations and system options.



Record the serial number for your system on the license form that ships with your system. Store the completed license form in a handy location so that you can access the serial number and license number in the future if needed.

- 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 installation or system option. License numbers have the following format:

Software installation license: U1000-0000-0000-0000-0000

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



If your software installations 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 install a patch version (x.y.z) without a license.

If you want to install software on 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 installations or system options, create a text file that contains the license numbers and serial numbers of the systems on which you want to install software. To obtain multiple key codes for software installations 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 software 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 Installations and System Options

Before you run the Softupdate file, 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. Using Internet Explorer, go to www.polycom.com/support/login and log in.
2. Click **License and Product Activation**.
3. 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 a software license or system option, enter your system serial number and license number and click **Generate**.



You need to set up an account if you do not already have one.

The key code displays on the screen. Make a note of this number on your license form or elsewhere for use during installation.

Obtaining Software and Option Key Codes for Multiple Systems

To obtain software or option key codes for multiple systems:

1. Using Internet Explorer, go to www.polycom.com/support/login and log in.
2. Click **License and Product Activation**.
3. Click **Attach File**.



You need to set up an account if you do not already have one.

4. 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 installing software, you do not need to download or run Softupdate. To activate system options on a single system, go to **System > Admin Settings > General Settings > Options** and enter the option key. If you want to activate system options on multiple systems, refer to *Installing Software and Options on Multiple Systems*.

Downloading the Software

1. Using Internet Explorer, go to www.polycom.com/support.
2. Navigate to your product software.
3. Download the appropriate software installation file.

Installing Software and Options on a Single System

1. Double-click **Softupdate.exe** to run the installation program.
2. Click **Begin Softupdate**, and then click **Next**.
3. Enter the information for the system on which you want to install software and options, and follow the prompts on the screen.

| Setting | Description |
|---------------------------------|---|
| IP Address or DNS Name | IP Address or DNS name of the system on which to install software and options. |
| Admin or Remote Access Password | If you are installing software version 8.0.3 or earlier, enter the admin password, if one is set. If you are installing software version 8.5 or later, enter the remote access password, if one is set. |
| Use Passive FTP | Specifies passive FTP connection to the system, if necessary, for systems behind a firewall. |
| Typical | Lets you install system software and enable system options. |
| Custom | Lets you install system software, enable system options, change system settings, and erase system flash memory. |
| Update Software | Lets you install new software on the system. |
| Enable System Options | Lets you enable options, such as Polycom People+Content™ IP, on the system. |
| Change System Settings | Lets you configure LAN properties, primary display properties, and security mode for the system. Custom install only. |
| Erase System Flash Memory | Erases the system flash memory, with the option to save system settings, directory entries, and software keys. Polycom recommends using this option only on the advice of your service provider. Custom install only. |
| System Settings | Saves all of the settings that are currently configured for the system. |
| All Directory Entries | Saves your entries for use after the installation. |
| Sample Sites in Directory | Saves sample site entries for use after the installation. Note: To access sample sites such as the Loopback entries, the Polycom Austin Stereo entry, and various Polycom regional entries, select Group > Sample Sites within the directory on the system. You can also find a list of worldwide numbers that you can use to test your system at www.polycom.com/videtest . |
| Call Detail Report | Saves call detail reports that are currently on the system. Custom install only. |
| Software and Option Keys | Saves the software and option keys for the system. Custom install only. |
| Yes, I have an option key | Lets you type the option key or browse to a text file that contains the option key. |
| No, I need to get an option key | The Polycom web site does not currently support this option. |
| User Name | Polycom web site login user ID. |
| Password | Polycom web site login password. |

| Setting | Description |
|-------------------------------|--|
| Enter the option key manually | Lets you manually type in your option key. |
| Find the option key in a file | Lets you browse to a text file that contains the option key. |

Installing Software and Options on Multiple Systems

If your organization includes a number of systems, you may decide to use a Windows batch file, Polycom Global Management System, or Polycom *ReadiManager*® to install software and options on multiple systems at one time.

Using a Windows Batch File for Multiple Systems

You can install software and options on multiple systems from the command line by creating a Windows batch file. The batch file should contain a line for each associated system. You can use command-line switches to customize the installation.

Use the following format for each line.

```
Softupdate_Version System_IP_address [switch:argument]
[switch:argument] ..
```

where `Softupdate_Version` is the name of the `Softupdate` executable file.

The following example uses `SoftupdateVSXSeries.exe` to install software and options on the system with IP address `10.11.12.13`. `Softupdate` retrieves the software key code from `software_keycodes.txt` and the options key code from `options_keycodes.txt`, both of which are located in the same directory as `SoftupdateVSXSeries.exe`.

```
SoftupdateVSXSeries 10.11.12.13 -kb:options_keycodes.txt
-ksb:software_keycodes.txt
```

| Switch | Arguments | Systems | Description |
|--------|-----------|---------|---|
| -p | :password | All | Supplies admin or remote access password (if one is set). Example: -p:updA1T3 |
| -f | :filename | All | Supplies the path and filename of the log file. Note that you must specify an existing directory for the log file. If no path is specified, the log file is created in the directory where <code>Softupdate</code> is located. Example: -f:c:\temp\log.txt Note: Paths should not contain spaces. |
| -fa | | All | Deletes the Directory or Address Book entries. |
| -fs | | All | Deletes the current system settings. |

| Switch | Arguments | Systems | Description |
|-------------------------|--------------------|---------|--|
| -q | | All | Runs the installation in “quiet mode.” Instead of prompting you to enter information, the installation obtains all required data from the switches and files you specify using the command line. |
| -m | | All | Runs Softupdate in “passive mode.” This option lets you run Softupdate on a system behind a NAT/firewall to install software and options on a system outside the NAT/firewall. |
| -ks | | VSX® | Do not install software on the system. Note: When you install system options, the software is automatically installed, unless you use this argument. |
| Software key codes | | | |
| -ksb | :SoftKeyCodeFile | VSX | Specifies the location of the Software Key Code file. If no path is specified, Softupdate looks in the current working directory. Example: -ksb:c:\temp\SWkeycodes.txt Note: Paths should not contain spaces. For information about Software Key Code files, refer to Obtaining Software and Option Key Codes for Multiple Systems . |
| -ksc | :SoftwareKeyCode | VSX | Specifies the software key code for a system. Example: -ksc:U3E4-7FED-A0A0-0000-0001 |
| Option key codes | | | |
| -kb | :OptionKeyCodeFile | VSX | Specifies the location of the Option Key Code File generated by Polycom. If no path is specified, Softupdate looks in the current working directory. Example: -kb:c:\temp\keycodes.txt Note: Make sure that -kb argument precedes the -ksb argument, if you use both. Paths should not contain spaces. For information about Option Key Code files, refer to Obtaining Software and Option Key Codes for Multiple Systems . |
| -kc | :OptionKeyCode | VSX | Specifies the option key code generated by Polycom for a system. Example: -kc:KDE5-F4DF-55A0-0000-0001 |
| Polycom web site access | | | |
| -ku | :PRCUserName | VSX | The Polycom web site does not currently support this option. |
| -kp | :PRCPassword | VSX | The Polycom web site does not currently support this option. |

Using Global Management System™ for Multiple Systems

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



To install software and options on multiple V Series and VSX systems, the Global Management System must be running version 6.11 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 installation requires a key code for each software and option installation. |
| Softupdate file to upload | Specifies the location of the software file to upload. |
| Softupdate 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. Start the Softupdate application, and click **Update**.

Using ReadManager for Multiple Systems

If your organization uses the Polycom ReadManager platform to manage systems on your network, you can use it to install software and options on multiple systems.



To install software and options on multiple systems, you must use ReadManager 2.0 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 Softupdate from the Polycom web site.
3. In the ReadManager interface, select **Directory Setup > Software Update Profiles**.
4. Edit each software installation 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 on which you want to install software and options, and click **Update**.
7. Specify when the installation should occur, and click **OK**.

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

Installing Software Over ISDN

You can perform a software installation over ISDN, allowing ISDN-only systems to conveniently install software even in remote locations.



Points to note:

- This feature is only available on VSX systems; the V Series systems do not support this feature.
- Only VSX systems that do not have an IP connection can perform the software installation over ISDN.
- You must install VSX software version 8.7.1 or higher to use the ISDN software update feature.
- You must disable Security Mode (**System > Admin Settings > General Settings > Security**) before using this feature.

To access the Polycom server:

1. Contact Polycom Support at 1-800-POLYCOM to be assigned valid authentication credentials.



Record the authentication credentials on the license form that ships with your system. Store the completed license form in a handy location so that you can access the authentication credentials in the future if needed.

2. Access the Polycom server at 978-292-2870.

To install software over ISDN:

1. Go to **System > Utilities > Software Update** on the VSX system.



The **Software Update** button appears only when IP is disabled or an Ethernet cable is disconnected.

2. Configure these settings on the Software Update screen:

| Setting | Description |
|-------------------------------|--|
| Delete System Settings | Specifies whether to delete the system settings when performing the software installation. |
| Server Authentication | Specifies how to initiate authentication with the Polycom software server. |
| ISDN Number for Server | Specifies the appropriate ISDN access number for the Polycom software server. |

| Setting | Description |
|-------------------------|--|
| Software Version | Specifies the software version for the software installation. <ul style="list-style-type: none">• Latest — Specifies the latest software version.• Specify — The user enters the desired software version number into the text-entry field. |
| Software Key | Specifies the software key necessary to install the software. |

3. Click **Software Update** to begin installing the software over ISDN.
4. View the software installation status on the Software Update progress screen.



The complete ISDN software update should take approximately 30-45 minutes.

Do not attempt to place a call or to perform any other functions during the ISDN software update.

5. To stop the software installation at any time, click **Cancel**.



Do not power off the system during the software installation process. If the installation is interrupted, the system may become unusable.

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