

# 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 update your software and system options.

To activate and install Polycom video software updates and options:

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

These steps are 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 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 back of 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 your software updates 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 update to a patch version (*x.y.z*) without a license.

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.



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 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 serial numbers might look like this:

```
82040903F01AB1
```

```
82043604G18VR2
```

## Obtaining Key Codes for Software Updates 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.x, 7.x, or 8.x.
- 2 Log in at <http://support.polycom.com>.  
Note that you will need to set up an account if you don't already have one.
- 3 Under Licensing & Product Registration, click **Activation/Upgrade**.
- 4 Click **Single Activation/Upgrade**.

Follow the onscreen instructions to request the key code. 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.x, 7.x, or 8.x.
- 2 Log in at <http://support.polycom.com>.  
Note that you will need to set up an account if you don't already have one.
- 3 Under Licensing & Product Registration click **Activation/Upgrade**.
- 4 Do one of the following steps to receive serial number and key code combinations:
  - To update 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 “[Collecting License Numbers and System Serial Numbers](#)” on page 1.

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-6E30-00-0009
```

```
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 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 your applicable HDX systems.

## 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.x, 7.x, or 8.x.
- 2 Go to <http://support.polycom.com>.
- 3 Select **Documents and Downloads > Video**.

- 4 Select your product.
- 5 Download the appropriate software release.

## Installing Software and Options

### Installing a Software Update 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.x, 7.x, or 8.x.
- 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 on a single system 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 one software package (.pup) file and one key code (.txt) file obtained from the Polycom website 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 a USB Device to Update Multiple Systems

To use a USB device to install a software update package on more than one HDX system, copy the key codes for each system that you want to update to the key code .txt file.

Use the steps in the previous section to install the update package on each HDX system for which you copied key codes to your USB device.

## Using Polycom CMA™ 4000 and 5000 to Update Multiple Systems



If a Polycom HDX system is running version 2.5.0.6 or later, the CMA system must be running version 4.1.4 or later to update the Polycom HDX system using traditional management mode.

If your organization uses Polycom CMA 4000 and 5000 to manage systems on your network, you can use it to update multiple endpoint systems after you complete the steps in “[Obtaining Software and Option Key Codes for Multiple Systems](#)” on page 3.

- 1 In the CMA web interface, go to **Admin > Software Updates > Automatic Software Updates** and select the tab for the endpoint type whose software you want to update.
- 2 Click **Upload Software Update**.
- 3 In the Upload Software Update dialog box verify the endpoint type and model.
- 4 If an activation key code is required to activate the software update, click the **Update Requires Key** checkbox, and in the Software Update Key File field browse to the .txt key file you saved to your local system.

Enter a meaningful description that will help other users to understand the purpose of the software update. (Note that the field is ASCII only.) An automatic softupdate profile for the endpoint type and model type appears in the Automatic Software Updates list.

For more information about updating system software, setting an automatic software update policy, and testing a trial version software update package, refer to the *Polycom CMA System Operations Guide* available at [www.support.polycom.com](http://www.support.polycom.com).

## Using Polycom ReadManager® to Update Multiple Systems

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



If a Polycom HDX system is running version 2.5.0.6 or later, the SE200 must be running version 3.0.7 or later to update the Polycom HDX system.

- 1 In the ReadManager interface, select **System Management > Profiles/Policies > Software Update Profiles**.
- 2 On the Software Update Profiles tab, select the types of systems you want to update and click **Upload Software Update Profile**.
- 3 Specify the location of the software and of the key file, if one is required. Click **OK**.

- 4 Select **Device > Softupdate View**.
- 5 Select the devices you want to update, and click **Software Update**.
- 6 Specify when the update should occur, and click **Schedule**.

For information about updating system software using the Polycom *ReadiManager* solution, refer to the *Polycom ReadiManager Operations Guide* available at [www.support.polycom.com](http://www.support.polycom.com).

## Using Polycom Global Management System™ to Update Multiple Systems

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

If a Polycom HDX system is running version 2.5.0.6 or later, Global Management System must be running version 7.1.10 or later to update the Polycom HDX system.

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

Setting	Description
Update requires key file	Specifies that the update requires a key code for each software and option update.
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 “ <a href="#">Obtaining Software and Option Key Codes for Multiple Systems</a> ” on page 3.
Description for uploaded file	Optional information about the Key Code file.

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

For information about updating system software using the Polycom *GMS*, refer to the *Polycom Global Management System User Guide* available at [www.support.polycom.com](http://www.support.polycom.com).

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