

Installing Software and Options for Polycom® HDX® Systems and Accessories



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 Polycom® HDX® software and system options, Polycom Touch Control, and Polycom EagleEye Director.



Polycom 8000 HD systems and Polycom 7000 HD systems with Hardware Version B require HDX version 2.5 or better and cannot be downgraded to previous software versions. You can determine your version by going to **System > System Information** in the local interface or **Admin > Tools > System Information** in the web interface.

Overview

Polycom HDX System and 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.

For more information about updating your Polycom HDX system, refer to [Updating Polycom HDX System Software and Options](#) on page 2.

Polycom Touch Control

The Polycom Touch Control does not require a license number or key code. 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 CMA server
- A server on your network

For more information about updating the Polycom Touch Control, refer to [Updating Software for the Polycom Touch Control](#) on page 11.

Polycom EagleEye Director

The Polycom EagleEye Director does not require a license number or key code.

To activate and install Polycom EagleEye Director software updates and options:

- 1 Download the software update file from the Polycom web site.
- 2 Install the software.

For more information about updating the Polycom EagleEye Director, refer to [Updating Software for the Polycom EagleEye Director](#) on page 15.

Updating Polycom HDX System Software and Options

Preparing for Polycom HDX System Software Updates



Points to note about HDX System Software Updates:

- Because of changes in software functionality and the user interface, some settings might be lost when you upgrade to the latest version or reinstall an older version after upgrading. Polycom recommends that you store your system settings using profiles and download your system directory before updating your system software. Do not manually edit locally saved profile and directory files. For more information about storing system settings, refer to the *Administrator's Guide for Polycom HDX Systems*.
- Systems perform an internal restart before running Software Update. This process improves the reliability of the update process by freeing up memory before performing the update. If you are updating a Polycom HDX system using a web browser, the internal restart is not visible from the web interface.
- Polycom HDX 6000 series, Polycom HDX 7000 series, and Polycom HDX 8000 series systems *must* be connected to one of the Polycom EagleEye cameras to receive signals from the remote control. Point the remote control at the camera to control those Polycom HDX systems.

Installing on a Polycom HDX System Under Warranty or a Service Plan

If you are installing software on a Polycom HDX system that is under warranty or a service plan, you need an upgrade key to activate the software. You can get that key by logging in to support.polycom.com and requesting the upgrade key. You need the Polycom HDX system's serial number to get the key.

If the Polycom HDX system is not under warranty or a service plan, you need to get a license and then activate the license on support.polycom.com to obtain an upgrade key.

Installing By Using a Management Server in Traditional Management Mode

To install the latest software version on a Polycom HDX system that is in traditional management mode, you must use a management system that supports the new Software Update method that involves an internal restart on the system. The following management systems support the new Software Update method:

- Polycom CMA version 4.1.4 or later
- Polycom Global Management System version 7.1.10 or later
- Polycom ReadManager SE200 version 3.0.7 or later

Installing an Older HDX System Version after Upgrading

If you reinstall an older version of software after upgrading to a later version, which is also known as downgrading, Polycom recommends performing a **Custom** installation and selecting **Erase System Flash Memory**. This setting is available when you use Software Update.

To downgrade from version 2.6.1 or later software to 2.6 or earlier software, first downgrade to version 2.6.0.2, then to the desired software release.

Collecting System Information for your Polycom HDX System Update



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

Serial and License Numbers

Make a note of your Polycom HDX 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 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 only serial numbers might look like this:

```
82040903F01AB1
```

```
82043604G18VR2
```

Key Codes for HDX System Software Updates and System Options

To activate options or perform a major or minor software update, you will need to 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.

Obtaining Software and Option Key Codes for a Single Polycom HDX System

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

- 1 On a computer, open Internet Explorer version 6.x, 7.x, or 8.x.
- 2 Log in at support.polycom.com.
- 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 Polycom HDX Systems

To obtain software or option key codes for multiple HDX systems:

- 1 On a computer, open Internet Explorer version 6.x, 7.x, or 8.x.
- 2 Log in at support.polycom.com.
- 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 [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
```

Creating One Text File for Upgrading Multiple Polycom HDX Systems

To create a single text file for upgrading multiple HDX 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 Polycom HDX System

If you want to activate Polycom HDX 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 Polycom HDX System Software

- 1** On a computer, open Internet Explorer version 6.x, 7.x, or 8.x.
- 2** Go to support.polycom.com.
- 3** Select **Documents and Downloads > Telepresence and Video**.
- 4** Select your product.
- 5** Download the appropriate software release.

Installing a Software Update and System Options on a Single HDX System

To update HDX system software using the Polycom HDX Web Interface:

- 1 After you download the appropriate software release, as described in the previous section, open Internet Explorer version 6.x, 7.x, or 8.x on your computer.
- 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 Enter the Admin ID as the user name (default is `admin`), and enter the Admin remote access password, if one is set.
- 4 Go to **Admin Settings > General Settings > Software Update**, and follow the instructions on the screen.



If your Polycom HDX system is connected to a Polycom EagleEye Director, go to **Admin Settings > General Settings > Software Update > Polycom HDX System**, and follow the instructions on the screen.

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



If your Polycom HDX system is paired with a Polycom Touch Control, you cannot use the USB port for software updates.

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 HDX 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 HDX Systems



If a Polycom HDX system is running software version 2.5.0.6 or later, the CMA system must be running software version 4.1.4 or later to update the Polycom HDX system using traditional management mode, which is considered a scheduled software update. When using dynamic management mode, you perform an automatic software update.

You can use a Polycom CMA 4000 or 5000 system to update multiple endpoint systems after you complete the steps in [Obtaining Software and Option Key Codes for Multiple Polycom HDX Systems](#) on page 5.

To perform an automatic software update:

- 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, such as **HDX Series**.
- 2 Click **Upload Software Update**.
- 3 In the Upload Software Update dialog box, verify the endpoint type.
- 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 and select the .txt key file you saved to your local system.
- 5 In the **Software Update File** field, browse to and select the .pup update file you saved to your local system.
- 6 Enter a meaningful description that will help other users to understand the purpose of the software update. (Note that the field is ASCII only.)
- 7 Click **OK**.

An automatic softupdate profile for the endpoint type appears in the Automatic Software Updates list.

To perform a scheduled software update:

- 1 In the CMA web interface, go to **Admin > Software Updates > Scheduled Software Updates** and select the endpoint type and model 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 and select the .txt key file you saved to your local system.
- 5 In the **Software Update File** field, browse to and select the .pup update file you saved to your local system.
- 6 Enter a meaningful description that will help other users to understand the purpose of the software update. (Note that the field is ASCII only.)
- 7 Click **OK**.

A scheduled softupdate profile for the endpoint type and model type appears in the Scheduled Software Updates list.

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

Using Polycom ReadManager® to Update Multiple HDX Systems

If your organization uses the Polycom ReadManager® platform to manage systems on your network, you can use it to update multiple HDX 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 Polycom 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 Readiness solution, refer to the *Polycom Readiness Operations Guide* available at support.polycom.com.

Using Polycom Global Management System™ to Update Multiple HDX Systems

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



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

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 Obtaining Software and Option Key Codes for Multiple Polycom HDX Systems on page 5.
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 support.polycom.com.

Updating Software for the Polycom Touch Control


You might need to update your HDX system at the same time you update the Polycom Touch Control. If the HDX software needs to be updated, update it before you update the Polycom Touch Control. For more information about updating your HDX system, refer to [Updating Polycom HDX System Software and Options](#) on page 2.

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

When checking for software updates, the Polycom Touch Control first checks for the presence of a USB storage device. When the Polycom Touch Control finds updates, it displays a list of updates and where they are located.

Installing the Software from a Polycom Server


To install updates from the Polycom support site automatically:

- 1 From the Home screen, touch  **Administration** and then **Updates**.
- 2 Ensure the correct server address is entered in the **Server Address** field. To use the Polycom server, enter polycom. The field is not case sensitive.
- 3 Enable **Automatically Check for Software Updates**.
- 4 Specify the automatic update options:
 - a **Start Time:** 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 window 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 will then check 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 install updates from the Polycom support site manually:

- 1 From the Home screen, touch  **Administration** and then **Updates**.
- 2 Ensure the correct server address is entered 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 Touch **Select All Software Updates** or touch only the updates that you want to install.
- 5 Touch **Download and Install Software**.

Installing Updates from a USB Storage Device

- 1 On a computer, open Internet Explorer version 6.x, 7.x, or 8.x.
- 2 Go to support.polycom.com.
- 3 Select **Documents and Downloads > Telepresence and Video**.
- 4 Navigate to the page for the Polycom HDX system that you use with the Polycom Touch Control.
- 5 Download the latest version of these distribution package files to your hard drive:
 - Polycom Touch Control Operating System
 - Polycom Touch Control Panel Software
- 6 Using a standard Windows zip utility, extract all contents of the files you downloaded to the root directory of a USB storage device.

When extracting multiple distribution packages to the USB drive, a pop up message might appear asking if you want to overwrite certain files that already exist. Select **Yes to All**.
- 7 Connect the USB device to the side of the Polycom Touch Control.
- 8 From the Home screen, touch  **Administration** and then **Updates**.
- 9 Touch **Check for Software Updates**.
- 10 Touch **Select All Software Updates** or touch only the updates that you want to install.
- 11 Touch **Download and Install Software**.

Using a CMA Web Server to Update the Software

Administrators can post Polycom Touch Control software to a CMA web server running version 5.5 or later, and then configure the Polycom Touch Control devices to get updates there.

To use a CMA web server as the update site:

- 1 Go to support.polycom.com, and navigate to the page for the Polycom HDX system that you use with the Polycom Touch Control.
- 2 Download the latest version of these distribution packages to your hard drive:
 - Polycom Touch Control Operating System
 - Polycom Touch Control Panel Software
- 3 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, such as **Touch Control**.
- 4 Click **Upload Software Update**.
- 5 In the Select File dialog box, navigate to and select the .zip files you downloaded in step 2. You must select the .zip files separately.
- 6 Click **Open**.

An automatic softupdate profile for the Polycom Touch Control appears in the Automatic Software Updates list.

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

- 7 From the CMA web interface, enter the Production URL or Trial URL, depending on how you plan to use the update, of the update site on the Update screen on the Polycom Touch Control.
- 8 Follow the steps described in [Installing the Software from a Polycom Server](#) on page 11 to automatically or manually update the Polycom Touch Control software.

Using Your Server to Update the Software

Administrators can post Polycom Touch Control software to their own web server and then configure the Polycom Touch Control devices to get updates there.

To use 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 HDX 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 the files to the root directory of the update site.
- 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 Enter the URL of the update site on the Update screen on the Polycom Touch Control.
- 8 Follow the steps described in [Installing the Software from a Polycom Server](#) on page 11 to automatically or manually update the Polycom Touch Control software.

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 packages that were 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, `setcurrent` and `removecurrent`, that you can use to maintain all of the Polycom Touch Control software extracted on your server.

1 setcurrel

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

- For *panel* software, run the appropriate setcurrel command below, 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:
 - » Unix or Linux: <root dir>/dists/venus/platform/setcurrel.sh
 - » Windows: <root dir>\dists\venus\platform\setcurrel.bat

2 removerel

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

- For *panel* software, run the appropriate removerel command below, 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:
 - » Unix or Linux: <root dir>/dists/venus/platform/removerel.sh
 - » Windows: <root dir>\dists\venus\platform\removerel.bat

Updating Software for the Polycom EagleEye Director

You might need to update your HDX system at the same time you update the Polycom EagleEye Director. If the HDX software needs to be updated, update it before you update the Polycom EagleEye Director. For more information about updating your HDX system, refer to [Updating Polycom HDX System Software and Options](#) on page 2. You must be running Polycom HDX system software version 3.0.1 or later to use the Polycom EagleEye Director.



The Polycom EagleEye Director must be detected by the HDX system before you can update the EagleEye Director software.

Installing Polycom EagleEye Director Software

- 1 On a computer, open Internet Explorer version 6.x, 7.x, or 8.x.
- 2 Go to support.polycom.com.
- 3 Select **Documents and Downloads > Telepresence and Video**.
- 4 Navigate to the page for the Polycom HDX system that you use with the Polycom EagleEye Director.
- 5 Download the latest version of the software to your hard drive.
- 6 In the browser address line of Internet Explorer, enter the HDX system's IP address, for example, `http://10.11.12.13`, to access its web interface.
- 7 Go to **Admin Settings > General Settings > Software Update > Polycom EagleEye Director**.
- 8 Select **Next**.
- 9 Browse to the location of the software update package you downloaded on your system.
- 10 Select **Update all EagleEye Director software modules** to force a complete update of every software module for the Polycom EagleEye Director. This setting is selected by default.

To update only the required software modules, clear **Update all EagleEye Director software modules**. This selection reduces the amount of time needed to complete the software update.
- 11 Select **Begin Update** to begin the software update.

The software update might take 15 minutes or more to complete.

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