



UPGRADE GUIDE

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Polycom RealPresence Resource Manager System



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Preparing for the System Upgrade

Topics:

- [Review the Release Notes](#)
- [Request or Locate System ISO \(Appliance Only\)](#)
- [Request a Software License Upgrade File \(non-RealPresence Clariti Appliance Editions Only\)](#)
- [Download Endpoint and Peripheral Software Updates](#)
- [Back Up the RealPresence Resource Manager System](#)
- [Download the Software Upgrade File](#)
- [Verify and Create System Storage Space](#)

This section describes the tasks you should do before of upgrading the Polycom[®] RealPresence[®] Resource Manager system. The steps vary according to the edition you have installed (Virtual Edition or Appliance Edition).

Review the Release Notes

Review the release notes for the software version to which you are upgrading. The release notes detail supported upgrade paths as well as a summary of new features, known issues, and resolved issues.

Procedure

- » Go to the [Polycom RealPresence Resource Manager Support Site](#).

Request or Locate System ISO (Appliance Only)

Polycom recommends that you have a system DVD for the currently installed RealPresence Resource Manager system version.

Procedure

1. Go to the [Polycom RealPresence Resource Manager Support Site](#).
2. Download the system ISO.
3. Contact Polycom Global Services to request an ISO if the ISO is not available on the support site.

Request a Software License Upgrade File (non-RealPresence Clariti Appliance Editions Only)

If you have an appliance editions and are NOT a RealPresence Clariti customer, you need to first request a software license file to use for your upgrade.

If you are upgrading a redundant system, you will need a software upgrade license file for the primary server in a redundant RealPresence Resource Manager system configuration.

Procedure

1. Log into the RealPresence Resource Manager system server as an administrator.
2. Go to **Admin > Server Settings > Licenses** and record the RealPresence Resource Manager system server serial number.
3. In a separate browser page or tab, go to <http://support.polycom.com>.
4. In the **Licensing & Product Registration** section, select **Activation/Upgrade**.
5. Log in or click **Register for an Account**.
6. Select **Site & Single Activation/Upgrade**.
7. In the **Site & Single Activation** page, enter the serial number you recorded in step 2.
8. Click **Next**.
9. Accept the **Export Restriction** agreement.
10. In the new **Site & Single Activation** page, enter the serial number listed on your License Certificate, enter the license number (shipped with the product), and click **Activate**.
11. In the **Key Code** field, **click here to download** to retrieve and save your license files.

Download Endpoint and Peripheral Software Updates

If your system has endpoint or peripheral software updates stored on it, you must download those updates so you can restore them after upgrading. They are not retained in the system backup.

If you choose not to download them now, you will need to re-upload them from <http://support.polycom.com>.

For more information on these tasks, refer to the *Polycom® RealPresence Resource Manager System Operations Guide*.

Back Up the RealPresence Resource Manager System

You need to back up the system. This process creates a backup archive of the RealPresence Resource Manager system.

Procedure

1. From the RealPresence Resource Manager system web interface, go to **Admin > Maintenance > Backup/Restore System Settings**.
2. Click **Create and Download a Backup Archive**.
3. On the **Download System Archive** dialog, click **OK** to save the archive file in the default location of your browser.

Note: Be sure to select a drive that is not on the server used for the RealPresence Resource Manager system. All data on the RealPresence Resource Manager system drive will be deleted during the upgrade process.

Download the Software Upgrade File

Both Appliance and Virtual Editions can be upgraded using the software upgrade file available from Polycom support website.

Procedure

1. On your local system, create a directory to which to save the software upgrade file if one does not already exist.
2. Using a web browser, go to <http://support.polycom.com>
3. In the **Documents and Downloads** section, select the appropriate **Category** (UC Infrastructure) and **Product** (RealPresence Resource Manager) for the required download and click **GO**.

You'll be taken to the RealPresence Resource Manager system webpage.

4. Select the file for the software to which you are upgrading.
5. You'll be required to submit a confirmation that you have read the RealPresence Resource Manager system End User License Agreement (EULA).

When the **File Download** dialog box appears, click **Save**.

6. When the **Save As** dialog box appears, browse to the directory created in step [1](#) and click **Save** to save the `.bin` file to your local system.
7. Record the location and name of the saved file.

Verify and Create System Storage Space

Upgrading to this version of RealPresence Resource Manager requires at least 9.5 GB of free disk space. When upgrading your system, you need to make sure the system has enough space for the upgrade. This will be more common for Virtual Edition upgrades.

Check the System Storage Space

You can verify storage space from the RealPresence Resource Manager system's dashboard.

Procedure

1. Go to the **Dashboard > CPU/Memory/Diskpane**.
2. Verify that **Partition[/var]** has more than 9.5 GB free space.

Release System Storage Space if Needed

If the var space is less than 9.5 GB, you can release disk space by deleting software updates that you have stored on the system.

Procedure

1. Go to **Endpoint > Dynamic Management > Upload Software Updates** or go to **Endpoint > Phone Management > Upload Software Updates**.
2. Select a software update.
3. Click **Delete Software Update**.
4. Repeat until enough space is available.

Upgrading a RealPresence Resource Manager System

Topics:

- [Upgrade a RealPresence Resource Manager System](#)
- [Perform the Software Upgrade](#)
- [Upload Endpoint and Peripheral Software Updates](#)

This chapter provides instructions for upgrading a non-redundant Polycom[®] RealPresence Resource Manager system.

Give yourself plenty of time for the system upgrade process. It will take some time, depending on the environment. At some steps you are instructed to wait. MAKE SURE YOU WAIT UNTIL THE PROCESS IS COMPLETE. Interrupting the upgrade can corrupt the system.

During the most of the upgrade process, the RealPresence Resource Manager system is offline, all services are unavailable and the serial console appears inactive. However, do not power off the system unless instructed to do so.

See the *Polycom RealPresence Resource Manager System Release Notes* for the version to which you are upgrading for information about valid upgrade paths.

See [Upgrading a Redundant System](#) for instructions on upgrading a redundant Polycom[®] RealPresence Resource Manager system.

Upgrade a RealPresence Resource Manager System

This chapter describes the upgrading tasks.

Procedure

1. [Preparing for the System Upgrade](#) on page 3
2. [Perform the Software Upgrade](#)
3. [Virtual Edition Only: Create a Larger Virtual Machine](#)
4. [Upload Endpoint and Peripheral Software Updates](#)

Perform the Software Upgrade

The system upgrade process may take up to 45 minutes, depending on the environment. At some steps you are instructed to wait. MAKE SURE YOU WAIT UNTIL THE PROCESS IS COMPLETE. Interrupting the upgrade can corrupt the system.

During the upgrade, the RealPresence Resource Manager system is offline and all services are unavailable. In addition, the serial console appears inactive; nevertheless, do not power off the system unless instructed to do so.

You must access the RealPresence Resource Manager system through Microsoft Internet Explorer or Google Chrome in order to perform an upgrade.

Procedure

1. Go to **Admin > Maintenance > Log Settings** and verify that the **Current Log Level** is set to **INFORMATIONAL**.
2. Go to **Admin > Maintenance > Server Software Upgrade**.
3. Click **Upload upgrade file to server** and browse to the location of the upgrade `.bin` file saved in [Download the Software Upgrade File](#).
4. Select the `.bin` file and click **Open**.

The `.bin` file uploads to the system.

5. When the system indicates the **File Upload** is **Complete**, click **OK**.
6. Click **Upgrade**.

When the status messages on the upgrade screen start changing ("Stopping services", "applying upgrade", etc.), the upgrade process has started. When the upgrade process is complete, the system reboots.

DO NOT close the browser while the upgrade is taking place.

7. When the upgrade is finished, a dialog displays the following message, **Upgrade Completed**. Click to **Log In**. You can now log back into the system.

Virtual Edition Only: Create a Larger Virtual Machine

If you need to support more than 400 devices or 20 network devices with your RealPresence Resource Manager system, the server you use must have 16 GB of RAM. If you are using a virtual edition, you will need to ensure that the system has enough RAM. You will need to create a new virtual machine with the required 16 GB of RAM and at least 160 GB of hard disk space.

Perform this step after upgrading.

Procedure

1. Perform the upgrade on your system.
2. Go to **Admin > Maintenance > Backup/Restore System Settings** to back up the system.
3. Install the system on a new virtual machine with 16 GB memory and 160 GB hard disk.
4. Restore the system on the new installed virtual edition.

See the *RealPresence Resource Manager Operation Guide* on how to do the system backup and restore.

See *RealPresence Resource Manager Getting Started Guide* on how to install a new system.

Upload Endpoint and Peripheral Software Updates

If your system had endpoint or peripheral software updates stored on it, you must upload those updates. They were not retained in the system backup.

If you stored them in another location in preparation for the upgrade, you can use that location as the source. If you did not, you can upload them from <http://support.polycom.com>.

For more information on these tasks, refer to the *Polycom® RealPresence Resource Manager System Operation Guide*.

Upgrading a Redundant System

Topics:

- [Upgrade Redundant System](#)
- [Check Machine Status](#)
- [Perform the Software Upgrade on the Primary Server](#)
- [Change to Use a 16G Memory and 160G Hard Disk Server](#)

A redundant RealPresence Resource Manager system configuration has two system servers and two IP addresses on the same network running in active/standby mode.

Take note of the following terminology:

- In a redundant configuration, one server is licensed as the *primary server* and the other server is licensed as the *redundant server*. That means that the primary server is always the primary server and the redundant server is always the redundant server.
- In a redundant configuration, there is only one *active server*. The active server is the server managing the system. That means when the redundant server is managing the system, it is the active server. This distinction is important when performing this upgrade.
- In a redundant configuration, there is only one *standby server*. The standby server is the server that is not managing the system. If at any time you receive a **Cannot find server** error when you try to log into a server, check to see if it is the standby server.

Also note that in a properly configured and fully operational redundant configuration, you must log into the virtual IP address for the locally redundant system or the virtual FQDN for a geographically redundant system, unless you have troubleshooting needs. When you log into the web interface of RealPresence Resource Manager system using the virtual IP address or the virtual FQDN, the **Redundant Configuration** page shows:

- Server host names and IP addresses.
- Server active status.
- Both servers have a **Machine Status** of **Online**.

See [Upgrading a RealPresence Resource Manager System](#) for instructions on upgrading a non-redundant system.

Upgrade Redundant System

Perform the following tasks to upgrade your redundant system.

Procedure

1. [Preparing for the System Upgrade](#).
2. [Check Machine Status](#)
3. [Perform the Software Upgrade on the Primary Server](#)
4. [Change to Use a 16G Memory and 160G Hard Disk Server \(Optional\)](#)
5. [Upload Endpoint and Peripheral Software Updates](#)

Check Machine Status

You need to make sure that the machine status of both servers is **Online** before upgrading.

Procedure

1. Go to **Admin > Server Settings > Redundant Configuration**.
2. Make sure that the **Machine Status** is **Online**.

Perform the Software Upgrade on the Primary Server

Perform these steps on the primary server in your redundant configuration.

The system upgrade process may take up to 90 minutes, depending on the environment. At some steps you are instructed to wait. **MAKE SURE YOU WAIT UNTIL THE PROCESS IS COMPLETE**. Interrupting the upgrade can corrupt the system.

During the upgrade, the RealPresence Resource Manager system is off line and all services are unavailable. Do not power off the system unless instructed to do so.

You must access the RealPresence Resource Manager system through Microsoft Internet Explorer or Google Chrome in order to perform an upgrade.

Procedure

1. Log into the RealPresence Resource Manager system, using the virtual IP address or the virtual FQDN.
2. Go to **Admin > Maintenance > System Log Files** and verify that the **Current Log Level** is set to **Informational**.
3. Go to **Admin > Maintenance > Server Software Upgrade**.
4. From the **Server Software Upgrade** page, click **Upload upgrade file to server** and browse to the location of the upgrade file saved in [Download the Software Upgrade File](#).
5. Select the `.bin` file and click **Open**.

The `.bin` file uploads to the system. DO NOT close the upload page while the upgrade is taking place.

6. When the system indicates the **File Upload** is **Complete**, click **OK**.
7. Click **Upgrade**.

When the status messages on the upgrade screen start changing ("Stopping services", "applying upgrade", etc.), the upgrade process has started. When the upgrade process is complete, the system reboots.

DO NOT close the browser while the upgrade is taking place.

8. When the upgrade is finished, a dialog displays the following message, **Upgrade Completed**. **Click to Log In**. You can now log back into the system.
9. Log into the RealPresence Resource Manager system, using the virtual IP address or the virtual FQDN.
10. Go to **Admin > Server Settings > Redundant Configuration** to verify that your system is configured for redundancy and that both servers are **Online**.

Change to Use a 16G Memory and 160G Hard Disk Server

If you need to support more than 400 devices with your RealPresence Resource Manager system, the server you use must have 16 GB of RAM. If you are using a Polycom Rack Server 220 or a Virtual Edition, you will need to ensure that the system has enough RAM. Either add more RAM to the Polycom Rack Server or create a new virtual machine with the required 16 GB of RAM.

Perform this step after upgrading.

Procedure

1. Perform the upgrade on your system.
2. Go to **Admin > Maintenance > Backup/Restore System Settings** to backup the system.
3. Install the system on a new virtual machine with 16 GB memory and 160 GB hard disk.
4. Restore the system on the new installed virtual edition.

See the *RealPresence Resource Manager Operation Guide* on how to do the system backup and restore.

See *RealPresence Resource Manager Getting Started Guide* on how to install a new system.

Upload Endpoint and Peripheral Software Updates

If your system had endpoint or peripheral software updates stored on it, you must upload those updates. They were not retained in the system backup.

If you stored them in another location in preparation for the upgrade, you can use that location as the source. If you did not, you can upload them from <http://support.polycom.com>.

For more information on these tasks, refer to the *Polycom® RealPresence Resource Manager System Operation Guide*.

Verifying your System Upgrade

Topics:

- [Verify that Your System is Functional](#)
- [Verify the Integration of Polycom RealPresence Access Director](#)

After completing the upgrade and verifying that you can access the system, you need to verify that your upgrade was successful.

Verify that Your System is Functional

Log into the system and verify basic functionality.


Procedure

1. On the login screen, verify that the system displays the version number of software to which you are upgrading.
2. Verify that you can schedule and start a conference.
3. Verify that you can monitor a conference.
4. Verify that you can terminate a conference.
5. Review the CDR for the test conference and verify the record is accurate

Verify the Integration of Polycom RealPresence Access Director

If your RealPresence Resource Manager environment includes a RealPresence Access Director system, you need to update the configuration and verify that the user name and password used are correct and that the system is configured as expected. The settings required for integrating with a RealPresence Access Director system have changed. In particular, the user name and password are now required, as well as the management IP address.

Procedure

1. Log into RealPresence Resource Manager .
2. Go to **Network Devices > Instances**.
3. Select a RealPresence Access Director instance.
4. Click .
5. Ensure the management IP address is accurate.

Be sure that the RealPresence Access Director management IP address is entered here. The management IP address may be different than the provider-side proxy address depending on your RealPresence Access Director configuration. If so, you will need to manually update the management IP address.

6. Update the **Admin User** and **Admin Password**.
7. Click **OK**.
8. Verify that the status of the Polycom RealPresence Access Director instance is **Online**.

Licensing for non-RealPresence Clariti Appliance Editions

Topics:

- [Licensing Non-RealPresence Clariti Appliance Editions](#)

The chapter details the steps to license your upgraded system if you have an Appliance Edition and are **NOT** a RealPresence Clariti customer.

Note: If you previously used RealPresence Platform Director to license your system, see [License Migration from RealPresence Platform Director Environment](#).

Licensing Non-RealPresence Clariti Appliance Editions

Major and minor releases of the RealPresence Resource Manager system require a new license. For example, when you upgrade from 9.0 to 10.0, you will need to re-license your system. After upgrading your appliance edition, you may need to upload a new license file if your upgrade order includes new features.

If you are **NOT** a RealPresence Clariti customer, use the following procedure to update your license.

License a non-redundant system

You can upload a license file to update the license for a non-redundant system.

Procedure

1. Go to **Admin > Server Settings > Licenses**.
2. Click **Update License** to view the **Update License** dialog box.
3. Click **Choose File** to navigate to the license file you received from Polycom.
4. Click **Preview** to preview the license features.
5. On the Update License dialog box, click **Update**.

The **Active License** section of the **Licenses** page is updated.

Upload the New License File for a Redundant System

This topic describes how to license a redundant system. You only need to upload one upgrade license file but you must access the system via the virtual IP address or virtual FQDN.

Procedure

1. Log into the RealPresence Resource Manager system using the virtual IP address or the virtual FQDN, and go to **Admin > Server Settings > Licenses**.
2. Click **Update License**.

3. Follow the instructions on the **Update License** dialog and be sure you have a backup copy of your initial license file.
4. Click **Choose File** and navigate to the primary license file you requested.
5. Click **Preview** to preview the license features and then click **Apply**.
6. Click **Update License** again.

Licensing for Upgraded RealPresence Clariti Appliance Editions

Topics:

- [License Your RealPresence Clariti Appliance Edition](#)

With the latest release RealPresence Resource Manager system, the system acts as a license server. If you have a virtual edition or are upgrading to a RealPresence Clariti license, follow the instructions in this chapter.

These instructions assume you did not previously have a RealPresence Platform Director system to manage licensing.

License Your RealPresence Clariti Appliance Edition

If you have previously used a license file instead of a license server to license your RealPresence Resource Manager, Appliance Edition and you have now purchased a RealPresence Clariti license, you must switch to using the RealPresence Resource Manager system for your license server.

After switching to the license server, you must set up the licensing for your system. You must create a new license server, activate the server and validate your new license(s). This involves the following steps:

Procedure

1. [Switch to the License Server](#)
2. [Create a License Server in the Polycom Licensing Center](#)
3. [Activate the Available Licenses](#)

Switch to the License Server

If you have previously used a license file instead of a license server to license your RealPresence Resource Manager, Appliance Edition and you have now purchased a RealPresence Clariti license, you must switch to using the RealPresence Resource Manager system for your license server.

Procedure

1. Log in to the RealPresence Resource Manager system.
2. Go to **Admin > Server Settings > Licenses**.
3. Click **Switch to License Server**.
4. Click **OK** to restart the system.
5. Log in to the system again after the restart.

You will only see the **License** menu.

Create a License Server in the Polycom Licensing Center

When your organization purchased licensing for RealPresence Resource Manager, Polycom sent an email containing a URL and login credentials for the Polycom Licensing Center. Use that information to

log into the Polycom Licensing Center, set up RealPresence Resource Manager as a license server, and manage your Polycom RealPresence licenses.

Note: If your RealPresence Resource Manager system does not have direct access to the Internet, you can log into the Polycom Licensing Center from a computer that does have Internet access and then use the off-line process to activate the license. With the off-line process, you can download a license file from the Licensing Center and then upload it into the RealPresence Resource Manager environment.

Procedure

1. In the RealPresence Resource Manager management interface, go to **License > Setup**.
A message indicates that the system is not licensed or the license has expired on the **License Setup** page.
2. Write the System Identifier number down or leave this page open.
You will need the System Identifier number to activate your licenses.
3. In a different browser window, log into the Polycom Licensing Center using the URL and credentials sent to you.
A successful login opens the **Polycom Licensing Center** page.
4. On the **Polycom Licensing Center** page, click **Create Server** to open the **Create Server** page.
5. Enter information as outlined in the following table to create a license server for your RealPresence products.

(continued)Create Server page fields

Field	Value Description
License Server ID	Copy and paste the System Identifier number from the RealPresence Resource Manager License Setup page.
Backup Device ID	Currently not supported. Leave this field blank.
ID Type	Select PUBLISHER_DEFINED. Note: This is a change from previous versions, which required an ID Type of VM_UUID.
Alias	(Optional) A unique name for your license server. If your organization deploys more than one, aliases make it easier to identify each specific instance.
Site Name	(Optional) A descriptive name for your Polycom RealPresence license management site.

6. Click **Create**.
After the license server is successfully created, the **View Server** page displays your valid License Server ID, ID Type, and Site Name.
Next, you map and generate available licenses to your RealPresence system.

Activate the Available Licenses

You can activate the available licenses by mapping the licensing add-ons you received. To do this, you must have an activation code from Polycom.

Before starting these steps, be sure to locate your activation code. It was most likely emailed to you from Polycom or your sales representative.

Procedure

1. Go to the **View Server** page of the new license server that you have created for RealPresence Resource Manager .
2. Click **Map Add-Ons**, enter the **Activation Code** that you have received from Polycom.
3. Click **Search**.
4. In the **Qty to Add** column for the available licenses, enter the number to allocate to the RealPresence Resource Manager instance.

This number should be 1.

If you need to have two or more RealPresence Resource Manager systems, you must have an activation code for each instance. You cannot use the same licensing server for multiple RealPresence Resource Manager system.

5. Click **Map Add-Ons** to allocate the licenses.

The **View Server** page returns, displaying a list of the server's licenses. The status for newly-allocated licenses is **License not generated**. A license must be generated (activated on the component) to allow the corresponding system component to operate within your RealPresence Platform system.

6. Repeat [step 3](#) to [step 5](#) to add all the Add-Ons.
7. If your RealPresence Resource Manager system does not have access to the Internet, click **Download Capability Response** to download a local copy of the license file.

This download allows you to manage RealPresence system licenses off-line. Note the location of the license file when you download it to your local computer. You will upload this file to the RealPresence Resource Manager instance to activate the licensing.

If your RealPresence Resource Manager system has access to the Internet, you must use the on-line method to license the system and its components. The off-line method for managing licenses is not an option when Internet access is available.

8. Return to the **RealPresence Resource Manager License Setup** page, and do one of the following:
 - Click **Online** if your environment has access to the Internet and can use the on-line method for managing licenses.
 - Click **Offline** if your environment does not have access to the Internet and therefore requires use of the off-line, file-based method for managing licenses. Prompts guide you through the off-line update process using the license file you previously downloaded from the Polycom Licensing Center.

Migrate License from RealPresence Platform Director Environment

Topics:

- [Remove DNS from RealPresence Platform Director](#)
- [Setting Up System Licenses](#)
- [Migrate Instances from RealPresence Platform Director to RealPresence Resource Manager](#)
- [Verifying the Migration](#)
- [Remove Licenses from RealPresence Platform Director](#)
- [Remove the RealPresence Platform Director Instance](#)

If you have previously used a RealPresence Platform Director system to manage your licenses, you need to migrate all your licenses and all instances to RealPresence Resource Manager system.

This includes licensing for Virtual Editions and upgrading RealPresence Clariti customers.

Perform the following tasks described in this section to finish migration.

Procedure

1. Upgrade your system.
See [Upgrading a RealPresence Resource Manager System](#)
2. [Verifying your System Upgrade](#)
3. [Remove DNS from RealPresence Platform Director](#)
4. [Setting Up System Licenses](#)
5. [Migrate Instances from RealPresence Platform Director to RealPresence Resource Manager](#)
6. [Remove Licenses from RealPresence Platform Director](#)
7. [Remove the RealPresence Platform Director Instance](#)

Remove DNS from RealPresence Platform Director

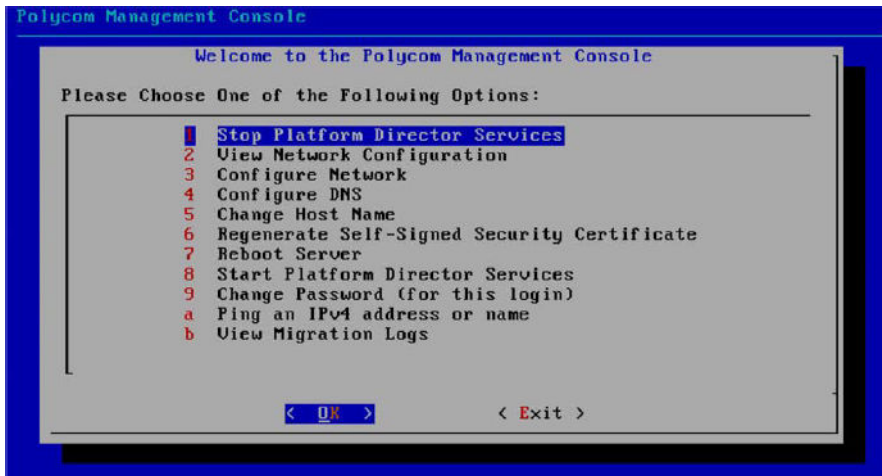
Polycom recommends that you remove the DNS from the RealPresence Platform Director system to cut the connection between the system and Polycom license server. After cutting the connection, RealPresence Platform Director system will not be able to get license information from the Polycom license server. After you remove the licenses from the Polycom license server, the RealPresence Platform Director will not reclaim its licenses accordingly. In this case, you will be able to migrate all the licenses/instances on RealPresence Platform Director system to the RealPresence Resource Manager system.

Procedure

1. Open Polycom Management Console in the vSphere or Hyper-V client where the RealPresence Platform Director instance is deployed.
 - a) Select the instance.
 - b) Select **Console**.

2. Click in the **Console** and at the local host login prompt, type `polycom` for both the user name and password if you did not change the default value.

The Polycom Management Console appears, as shown next.



3. Choose **4 Configure DNS**.
4. Remove all the DNS information.
5. Exit the **Console**.

Setting Up System Licenses

When you migrate to the RealPresence Resource Manager to manage licenses, you must create a new license server and move all the available licenses to the new license server, and activate and validate these licenses. This involves the following steps:

- [Create a License Server in the Polycom Licensing Center](#)
- [Activating the Available Licenses](#)

Create a License Server in the Polycom Licensing Center

When your organization purchased licensing for RealPresence Resource Manager, Polycom sent an email containing a URL and login credentials for the Polycom Licensing Center. Use that information to log into the Polycom Licensing Center, set up RealPresence Resource Manager as a license server, and manage your Polycom RealPresence licenses.

Note: If your RealPresence Resource Manager system does not have direct access to the Internet, you can log into the Polycom Licensing Center from a computer that does have Internet access and then use the off-line process to activate the license. With the off-line process, you can download a license file from the Licensing Center and then upload it into the RealPresence Resource Manager environment.

Procedure

1. In the RealPresence Resource Manager management interface, go to **License > Setup**.

A message indicates that the system is not licensed or the license has expired on the **License Setup** page.

2. Write the System Identifier number down or leave this page open.

You will need the System Identifier number to activate your licenses.

3. In a different browser window, log into the Polycom Licensing Center using the URL and credentials sent to you.

A successful login opens the **Polycom Licensing Center** page.

4. On the **Polycom Licensing Center** page, click **Create Server** to open the **Create Server** page.
5. Enter information as outlined in the following table to create a license server for your RealPresence products.

(continued)Create Server page fields

Field	Value Description
License Server ID	Copy and paste the System Identifier number from the RealPresence Resource Manager License Setup page.
Backup Device ID	Currently not supported. Leave this field blank.
ID Type	Select PUBLISHER_DEFINED. Note: This is a change from previous versions, which required an ID Type of VM_UUID.
Alias	(Optional) A unique name for your license server. If your organization deploys more than one, aliases make it easier to identify each specific instance.
Site Name	(Optional) A descriptive name for your Polycom RealPresence license management site.

6. Click **Create**.

After the license server is successfully created, the **View Server** page displays your valid License Server ID, ID Type, and Site Name.

Next, you map and generate available licenses to your RealPresence system.

Activating the Available Licenses

You must move the activated licenses to the new license server. This involves the following steps:

- [Remove the Add-Ons from the Old License Server.](#)
- [Add the Add-Ons to the New RealPresence Resource Manager License Server](#)

Remove the Add-Ons from the Old License Server

The add-ons must be removed from the old RealPresence Platform Director license server.

Procedure

1. Log into the RealPresence Platform Director to get the License Server ID from the **License > Setup** page.

2. On **Polycom Licensing Center**, select **Devices > Search Servers**.
3. Enter the License Server ID in the **License Server ID** field.
4. Click **Filter**.
5. Click the server from the research list.
6. On the **View Server** page, click **Remove Add - Ons**.
7. Write down the **Activation Code** and the **Quantity** for each add-on to be removed.
The **Activation Code** will be used to search the removed add-ons and add them back to the new created RealPresence Resource Manager license server.
8. In the **Quantity to Remove** field of the add-ons, enter the number of units to remove and click **Remove Add-Ons**.
The numbers, which you entered, should be equal to the numbers in the **Currently on Device** column.
9. Click **Download Capability Response** to remove the add-ons and save a license file.
The file will be used to remove the license on your RealPresence Platform Director if the server is off-line.
10. Refresh the page to verify that the add-ons were removed.

Add the Add-Ons to the New RealPresence Resource Manager License Server

You need to add the add-ons to the new license server.

Procedure

1. Go to the **View Server** page of the new license server that you have created for the RealPresence Resource Manager system.
2. Click **Map Add-Ons**, and enter the **Activation Code** of the add-ons that you removed in the previous section.
3. Click **Search**.
4. In the **Qty to Add** column for the available licenses, enter the number to allocate to the RealPresence Resource Manager instance.
If you need to have two or more RealPresence Resource Manager systems, you must have an activation code for each instance.
5. Click **Map Add-Ons** to allocate the licenses.
The **View Server** page returns, displaying a list of the server's licenses. The status for newly-allocated licenses is License not generated. A license must be generated (activated on the component) to allow the corresponding system component to operate within your RealPresence Platform system.
6. Repeat [step 2](#) to [step 5](#) to add all the Add-Ons that you have removed.
7. If your RealPresence Resource Manager system does not have access to the Internet, click **Download Capability Response** to download a local copy of the license file.
This download allows you to manage RealPresence system licenses off-line. Note the location of the license file when you download it to your local computer. You will upload this file to the RealPresence Resource Manager instance to activate the licensing.
If your RealPresence Resource Manager system has access to the Internet, you must use the on-line method to license the system and its components. The off-line method for managing licenses is not an option when Internet access is available.
8. Return to the **RealPresence Resource Manager License Setup** page, and do one of the following:

- Click **Online** if your virtual environment has access to the Internet and can use the on-line method for managing licenses.
- Click **Offline** if your virtual environment does not have access to the Internet and therefore requires use of the off-line, file-based method for managing licenses. Prompts guide you through the off-line update process using the license file you previously downloaded from the Polycom Licensing Center.

Migrate Instances from RealPresence Platform Director to RealPresence Resource Manager

After you have upgraded the RealPresence Resource Manager system and set up your license server, you can migrate your instances to the RealPresence Resource Manager system.

Before performing the following steps, be sure that you meet the following prerequisites:

- Ensure that the user performing the upgrade has Device Admin permissions.
- Make sure that RealPresence Platform Director and all of the instances that it monitors or manages are running.

Procedure

1. Within the RealPresence Resource Manager system, go to **Admin > Maintenance > Server Software Upgrade**.
2. Click the **Migration** button.
3. Enter the IP address and administrator account of the RealPresence Platform Director where you want to migrate instances from.
4. Click **OK** to start the migration.

During the migration, all the existing instances will be rebooted and added to the RealPresence Resource Manager system by their IP addresses. After migration, you will find the instances from **Network Device > Instances**.

Note: The RealPresence Platform Director system remains running during the migration process. Do NOT reboot the system after you have started the migration. Rebooting the RealPresence Platform Director system will cause the migration to fail.

Verifying the Migration

Perform the tasks in this section to verify the migration.

View System Alerts

You should also view any alerts reported during the migration. You should watch for the following migration alerts which are generated by the RealPresence Resource Manager system in the event of an error.

- NetworkDeviceConfigFailure
- MigrationLicenseFeatureAllocationFailure

Procedure

- » Go to **Alert > Alert View**.

Verify a Migrated RealPresence DMA Supercluster

You may have a RealPresence DMA supercluster working in the following scenarios:

- The RealPresence DMA supercluster is integrated with RealPresence Resource Manager . The RealPresence Platform Director system manages licenses the RealPresence DMA systems in the supercluster. After migration, all the RealPresence DMA systems in the supercluster will be migrated to the RealPresence Resource Manager system with the same RealPresence DMA system integrated.
- The RealPresence DMA supercluster is not integrated with RealPresence Resource Manager . The RealPresence Platform Director system manages licenses for the RealPresence DMA systems in the supercluster. After migration, all the RealPresence DMA systems in the supercluster will be migrated to the RealPresence Resource Manager system for license management.
- The RealPresence DMA supercluster is integrated with RealPresence Resource Manager . The RealPresence Platform Director system does not manage licenses for the RealPresence DMA systems in the supercluster. The migration does not impact the RealPresence DMA supercluster.

Procedure

1. Go to **Network Device > Instances**.
2. Verify that all the RealPresence DMA systems in the supercluster are added and the status is online.
3. Go to **License > Allocation** and check if you can allocate license for the RealPresence DMA systems successfully.


Verify the Migrated Appliance Instances with Legacy Licensing

For the migrated appliance instances with legacy licensing, you must manually update their **Admin User** and **Admin Password** to their pre-migration values.

Manually Update Powered off Instances

If the instances (servers) are powered off during migration, you can still find them in **Network Device > Instances**. The status of these instances are offline 🚫. The RealPresence Resource Manager system generates a **ConfigurationAlarm** type alert for these systems.

Procedure

1. Power on the servers.
2. Go to **Network Device > Instances**.
3. Select the offline migrated instance.
4. Click .
5. Check the server information in the **Edit Instance** dialog box to make sure the information is accurate.
6. Click **OK** to update the instance.

Remove Licenses from RealPresence Platform Director

Since you have removed DNS, you need to remove licenses from RealPresence Platform Director offline by importing the license file generated in the previous section ([Remove the Add-Ons from the Old License Server, step 9](#)). You must first migrate all the instances from RealPresence Platform Director to RealPresence Resource Manager and then import the license file to remove all the licenses on the RealPresence Platform Director system.

Note: The RealPresence Platform Director system remains running during the migration process. Do NOT reboot the system after you have started the migration. Rebooting the RealPresence Platform Director system will cause the migration to fail.

Procedure

1. Log into the RealPresence Platform Director system.
2. Go to **License > Setup**.
3. Click **Offline**.
4. Import the license file by clicking the **Choose File** button.
5. Click **Update**.

After you import the license file, all of the licenses on RealPresence Platform Director system will be removed and the system cannot be used anymore.

Remove the RealPresence Platform Director Instance

After you complete the above steps and make sure all the migrated instances are online in RealPresence Resource Manager system, you can remove your RealPresence Platform Director instance from your environment to finish the whole migration.