

# ReadiManager® SE200

---

## System Upgrade Guide



## Trademark Information

Polycom®, the Triangles logo, ReadiManager®, SoundPoint®, SoundStation®, ViaVideo®, VoiceStation®, and Vortex are registered trademarks of Polycom, Inc. Convene™, Global Management System™, iPower™, MGC™, People+Content™, People On Content™, Polycom Conference Suite™, Polycom HD Voice™, Polycom PathNavigator™, Polycom VideoPlus™, Polycom VoicePlus™, PVX™, RAS™, ReadiConvene™, RMX 2000™, RSS™, V2iU™, VS4000™, VSX™, and VTX™ are trademarks of Polycom, Inc.

Other product and corporate names may be trademarks of other companies and are only used as a fair use reference without intent to infringe.

## Patent Information

The accompanying product is protected by one or more U.S. and foreign patents and/or pending patent applications held by Polycom, Inc.

3725-18009-001D3 (05/2008)

3.0.2

© 2008 Polycom, Inc. All rights reserved.

Polycom Inc.  
1765 West 121st Avenue  
Westminster, CO 80234-2301 U.S.A.

No part of this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without the express written permission of Polycom, Inc. Under the law, reproducing includes translating into another language or format.

As between the parties, Polycom, Inc. retains title to, and ownership of, all proprietary rights with respect to the software contained within its products. The software is protected by United States copyright laws and international treaty provision. Therefore, you must treat the software like any other copyrighted material (e.g. a book or sound recording).

Every effort has been made to ensure that the information in this manual is accurate. Polycom, Inc. is not responsible for printing or clerical errors. Information in this document is subject to change without notice.

---

# Contents

## 1 Upgrading a Non-Redundant ReadManager System

Download the Software Upgrade File .....	1
Save a Back Up of the ReadManager System Databases .....	2
Perform the Software Upgrade .....	3
Perform the Database Upgrade .....	4
Verify the Upgrade .....	5

## 2 Upgrading a Redundant ReadManager System

Download the Software Upgrade File .....	8
Save a Back Up of the ReadManager System Databases .....	8
Perform the Upgrade .....	9
Verify the Upgrade .....	12



---

# Upgrading a Non-Redundant RediManager System

This chapter provides instructions for upgrading a non-redundant RediManager system. See [Chapter 2](#) for instructions on upgrading a redundant RediManager system.

**IMPORTANT** See the RediManager system release notes for the version to which you are upgrading for information about valid upgrade paths.

Note that the RediManager system upgrade no longer requires a USB stick or a console connection to the RediManager server. However, to create an up to the minute backup of the the internal RediManager system database, you must have a console connection to the RediManager server or RediConvene IAM system serial port.

## Download the Software Upgrade File

### To download the software required to update the system

- 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 [www.polycom.com/support](http://www.polycom.com/support).
- 3 In the **Downloads** section, select the Network **Category** and the RediManager SE200 **Product** for the required download.  
A list of the available RediManager downloads appears.
- 4 Select the upgrade file for the version of software to which you are upgrading.
- 5 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**.

The `.zip` file is saved to your local system.

- 7 Extract the `.cab` file from the `.zip` file.

## Save a Back Up of the ReadiManager System Databases

You must save a back up of your ReadiManager system databases whether they are internal or external.

This section describes backing up the internal databases. If your system uses an external database, ask your database administrator to backup the external ReadiManager databases according to SQL Server Management Studio procedures or your company's backup procedures.

### To backup the internal ReadiManager system databases

- 1 To use the last nightly database backups created by the ReadiManager system:
  - a Log into the ReadiManager system.
  - b Click **System Management > Database Backup Files**.
  - c When the **Database Backup Files** list appears, right click on the latest ReadiManager `.bak` file, click **Save**, and save the file to a location on your local system.
  - d Right click on the latest **Logger .bak** and select **Save**, and save the file to a location on your local system.
- 2 To create up to the minute database backups, connect to the RS232 port or the ReadiManager server and activate the console:
  - » **Bits per second:** 19200
  - » **Data bits:** 8
  - » **Parity:** None
  - » **Stop bits:** 1
  - » **Flow control:** None
  - a In the **SE200 - HyperTerminal** window, press **Enter** to display the **Root Menu**.
  - b From the **Root** menu, select **Database Operations**.
  - c From the **Database Operations** menu, select **Backup Local Databases**.

If you have a previous backup that you created earlier, a warning appears stating: “The following backup database files will be deleted. To keep these files, enter ‘N’ to exit and then use the Copy Database operation to copy them to an external location. Do You Wish to Continue?”

- » To overwrite the previous backup database files, select **Y**.
  - » To avoid overwriting the previous backup and copy these files to the hard drive on the RediManager server, select **N** and then select **Copy Database files TO RediManager**.
  - » To avoid overwriting the previous backup and copy these files to a USB drive on the RediManager server, select **N** and then select **Copy Database files FROM RediManager**.
- d** When prompted, enter the administrator **Username** and **Password**.  
The system backs up the database. When the backup is complete, a success message for the completed backup displays on the console screen.

## Perform the Software Upgrade

### IMPORTANT

- 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 these procedures, the RediManager 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.
- If you have an external database, make sure to close all external database connections before performing this upgrade .

### To upgrade the RediManager software

- 1** Log into the RediManager system.
- 2** Select **System Setup > Management and Security > Server Software Upgrade**.
- 3** From the **Server Software Upgrade** page, click **Upload upgrade file to server** and browse to the location of the upgrade .cab file saved in [“Download the Software Upgrade File”](#) on page 1.
- 4** Select the .cab file and click **Open**.  
The .cab 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.

**Note** As a result of the upgrade, the ReadManager system is directed to an internal database even if the system was originally directed to an external database.

## Perform the Database Upgrade

Perform this procedure only if you have an external database

### To upgrade the external database

- 1 After the system completely reboots, log into the ReadManager system.
- 2 Open a browser window and in the **Address** field enter `http://<ReadiManager_IP_Address>/pub/DBUpgrade.exe`
- 3 When the **File Download** dialog box appears, click **Run**.
- 4 Click **OK** to begin the upgrade.
  - Make sure you know the path to the Microsoft SQL Server.
  - If you use Microsoft Windows authentication, be sure your login account has administrator privileges on the SQL server (i.e., is a member of the `sysadmin` group).

After the database upgrade is complete, the server reboots.

- 5 Re-enable the external SQL Server database:
  - a Select **System Setup > Server Settings > Database**.

**Note** Do not run the **Database Setup** program. It will overwrite your database.

- b On the **Database** screen, select the **Use an external SQL Server database** check box, re-enter the external database settings, and click **Update**.

The system reboots.

- 6 After the system completely reboots, log into the ReadManager system.
- 7 Select **System Setup > Server Settings > Database** and verify that the external database is enabled.

## Verify the Upgrade

### To verify that the upgrade was successful:

- 1 On the login screen, verify that the system displays the version number of software to which you are upgrading.
- 2 Verify that your endpoints are registered to the Gatekeeper and Global Address Book, as required.
- 3 Verify that you can schedule and start a conference.
- 4 Verify that you can monitor a conference.
- 5 Verify that you can terminate a conference.
- 6 Review the CDR for the test conference and verify the record is accurate.



---

# Upgrading a Redundant ReadManager System

This chapter provides instructions for upgrading a redundant ReadManager system. See [Chapter 1](#) for instructions on upgrading a non-redundant ReadManager system.

**IMPORTANT** Refer to the ReadManager system release notes for the version to which you are upgrading for information about valid upgrade paths.

Note that the ReadManager system upgrade no longer requires a USB stick or a console connection to the ReadManager server.

## About Redundancy and Upgrading a Redundant ReadManager system

A redundant ReadManager system configuration has two ReadManager servers and three IP addresses on the same network — one physical IP address for each of the servers and one virtual IP address dedicated to endpoint registration.

**Note** In a redundant configuration, one server is licensed as the primary server and the other server is licensed as the redundant server, so primary server and redundant server are exclusionary terms. That means that even in a failover situation where the redundant server is managing the system, the redundant server is not considered the primary server. This distinction is also important when performing this upgrade.

When upgrading a redundant ReadManager system, you will be instructed when to disable redundancy between the primary and redundant servers and when to re-enable redundancy. During these procedure only one of the two ReadManager servers is powered on at any given time. Be sure to follow these procedures carefully.

## Download the Software Upgrade File

### To download the software required to update the system

- 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 [www.polycom.com/support](http://www.polycom.com/support).
- 3 In the **Downloads** section, select the Network **Category** and the ReadManager SE200 **Product** for the required download.  
A list of the available ReadManager downloads appears.
- 4 Select the upgrade file for the version of software to which you are upgrading.
- 5 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**.  
The **.zip** file is saved to your local system.
- 7 Extract the **.cab** file from the **.zip** file.

## Save a Back Up of the ReadManager System Databases

You must save a back up of your ReadManager system databases. Because your redundant system requires an external database, ask your database administrator to backup the external ReadManager databases according to SQL Server Management Studio procedures or your company's backup procedures.

## Perform the Upgrade

### IMPORTANT

- The upgrade script 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 these procedures, the RediManager 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.
- Make sure to close all external database connections before performing this upgrade.
- During these procedures only one of the two RediManager servers is powered on at any given time. Be sure to follow these procedures carefully and refer to the IP addresses you record in step [2a](#) if you need help determining which is your primary or redundant server.
- Physical access to the RediManager servers is required to complete this procedure.

### To upgrade the RediManager software on the primary server

- 1 Log into both the primary and redundant RediManager servers.
- 2 On the primary server:
  - a Select **System Setup > Server Settings > Redundant Configuration** and record the IP address of the virtual, primary, and redundant servers. You'll need this information throughout the upgrade.  
 Virtual IP address: \_\_\_\_\_  
 Primary server IP address: \_\_\_\_\_  
 Redundant server IP address: \_\_\_\_\_
  - b Select **System Management > Dashboard > Shutdown** to shut down the primary server.
- 3 On the redundant server:
  - a Select **System Setup > Server Settings > Database**.
  - b On the **Database** screen, uncheck the **Use an external SQL Server database** check box to disable the external SQL Server database.  
 The system reboots.
  - c After the system reboots, log into the redundant server and select **System Management > Dashboard > Shutdown** to shut it down.
- 4 Power ON and log into the primary server.
- 5 On the primary server:
  - a Select **System Setup > Management and Security > Server Software Upgrade**.

- b** From the **Server Software Upgrade** page, click **Upload upgrade file to server** and browse to the location of the upgrade .cab file saved in [“Download the Software Upgrade File”](#) on page 8.
- c** Select the .cab file and click **Open**.
- d** When the system indicates the **File Upload is Complete**, click **OK**.
- e** 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 server reboots.

**Note** As a result of the software upgrade, the server is pointed at its internal database. Leave it pointed to the internal database until instructed to re-enable the external database.

#### To upgrade the external database

- 1** After the server completely reboots, on the primary server:
  - a** Open a browser window and in the **Address** field enter `http://<Primary_Server_IP_Address>/pub/DBUpgrade.exe`
  - b** When the **File Download** dialog box appears, click **Run**.
  - c** Click **OK** to begin the upgrade.
    - » Make sure you know the path to the Microsoft SQL Server.
    - » If you use Microsoft Windows authentication, be sure your login account has administrator privileges on the SQL server (i.e., is a member of the sysadmin group).

After the database upgrade is complete, the server reboots.
- d** After the primary server completely reboots, log into the server and select **System Management > Dashboard > Shutdown** to shut it down.

#### To upgrade the ReadiManager software on the redundant server

- 1** When the primary server has completely shutdown, power ON and log into the redundant server.
- 2** On the redundant server:
  - a** Select **System Setup > Management and Security > Server Software Upgrade**.

- b** From the **Server Software Upgrade** page, click **Upload upgrade file to server** and browse to the location of the upgrade **.cab** file saved in [“Download the Software Upgrade File”](#) on page 8.
- c** Select the **.cab** file and click **Open**.  
The **.cab** file uploads to the server.
- d** When the system indicates the **File Upload is Complete**, click **OK**.
- e** 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.
- f** After the redundant server completely reboots, log into the server and select **System Management > Dashboard > Shutdown** to shut it down.

### To finish the upgrade and re-enable redundancy

- 1** When the redundant server has completely shutdown, power ON and log into the primary server.
- 2** On the primary server:
  - a** Select **System Setup > Server Settings > Database** to re-enable the external SQL Server database:

**Note** Do not run the **Database Setup** program. It will overwrite your database.

- b** On the **Database** screen, select the **Use an external SQL Server database** check box, re-enter the external database settings, and click **Update**.  
The system reboots.
  - c** After the system completely reboots, log into the primary server.
  - d** Select **System Setup > Server Settings > Database** and verify that the external database is enabled.
  - e** Select **System Setup > Server Settings > Redundant Configuration** and verify that the system redundancy is properly configured and active.
- 3** On the redundant server:
    - a** Power ON and log into the redundant server.
    - b** Select **System Setup > Server Settings > Database** to re-enable the external SQL Server database:

**Note** Do not run the **Database Setup** program. It will overwrite your database.

- c** On the **Database** screen, select the **Use an external SQL Server database** check box and click **Update**.

The system reboots.

- d** After the system completely reboots, log into the redundant server.
- e** Select **System Setup > Server Settings > Database** and verify that the external database is enabled.

## Verify the Upgrade

### To verify that the upgrade was successful:

- 1** On the login screen, verify that the system displays the version number of software to which you are upgrading.
- 2** Verify that your endpoints are registered to the Gatekeeper and Global Address Book, as required.
- 3** Verify that you can schedule and start a conference.
- 4** Verify that you can monitor a conference.
- 5** Verify that you can terminate a conference.
- 6** Review the CDR for the test conference and verify the record is accurate.