



Upgrade Guide

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Polycom® RealPresence® Resource Manager System



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Prepare for Polycom® RealPresence® Resource Manager System Upgrade

This chapter describes the tasks you should do in advance of upgrading the Polycom RealPresence Resource Manager system. The steps vary according if you have the Virtual Edition or Appliance Edition.

- [Prepare to Upgrade an Appliance Edition](#)
- [Prepare to Upgrade a Virtual Edition](#)

Prepare to Upgrade an Appliance Edition

Perform the following steps to prepare for upgrading your RealPresence Resource Manager system, Appliance Edition.

- [Review the Release Notes](#)
- [Request or Locate System DVD](#)
- [Request a Software License Upgrade File](#)
- [Back Up the RealPresence Resource Manager System](#)
- [Prepare to Upgrade a Virtual Edition](#)

Review the Release Notes

You should 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.

Request or Locate System DVD

Please be sure to carefully follow the documented procedures for the upgrade to ensure success. As with any upgrade, we recommend that the person performing the upgrade has a system DVD for the currently installed RealPresence Resource Manager system version available during the upgrade process. With the system DVD, you can re-image the system back to its original state and restore the original system data. If needed, contact Polycom Global Services to request a system DVD.

Request a Software License Upgrade File

For appliance editions, you need to first request a software license file to use for your upgrade.

To request a software license file:

- 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 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 and enter the license number (shipped with the product) and click **Activate**.
If retrieving licenses for a redundant system, repeat this step for each server in your configuration.
- 11 In the **Key Code** field, **click here to download** to retrieve and save your license files.



Licensing for a Redundant System

When you have a redundant RealPresence Resource Manager system, you'll need a license file for each system in your configuration. Enter each serial number separately.

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 and stored them in another location in preparation for the upgrade, 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 entire system. This process creates a backup archive of the RealPresence Resource Manager system. Once this archive is created, you must immediately continue on to [Upgrading a Non-Redundant Polycom Resource Manager System](#) or [Upgrading a Redundant Polycom RealPresence Resource Manager System](#).

To backup the RealPresence Resource Manager system:

- 1 From the Resource Manager system web interface, go to **Admin > Maintenance > Backup/Restore System Settings**.
- 2 When the **Backup/Restore System Settings** page appears, click **Create and Download a Backup Archive**.
- 3 In the **Select location for download** dialog box, enter a unique **File name**, browse to a location on your system and click **Save**.



Storing the Backup File

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.

A **File Download** dialog box displays the progress of the download operation.

- 4 When the operation is completed, click **OK**.

- 5 Browse to the location specified and verify the file download.

Prepare to Upgrade a Virtual Edition

Perform the following steps before upgrading a RealPresence Resource Manager system, Virtual Edition/

- [Review the Release Notes](#)
- [Update your Virtual Edition License If Necessary](#)
- [Back Up the RealPresence Resource Manager System](#)
- [Download Endpoint and Peripheral Software Updates](#)

Review the Release Notes

You should 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.

Update your Virtual Edition License If Necessary

If your upgrade includes a new feature license (such as high redundancy for virtual editions), you will need to update the RealPresence Platform Director system with the new license information. This is done by adding feature add-ons to your license server.

For complete instructions, see *RealPresence Platform Director System Administrator's Guide*.

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 and stored them in another location in preparation for the upgrade, 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 entire system. This process creates a backup archive of the RealPresence Resource Manager system. Once this archive is created, you must immediately continue on to [Upgrading a Non-Redundant Polycom Resource Manager System](#).

To backup the RealPresence Resource Manager system:

- 1 From the Resource Manager system web interface, go to **Admin > Backup/Restore System Settings**.
- 2 When the **Backup/Restore System Settings** page appears, click **Create and Download a Backup Archive**.
- 3 In the **Select location for download** dialog box, enter a unique **File name**, browse to a location on your system and click **Save**.



Backup Locations

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.

A **File Download** dialog box displays the progress of the download operation.

- 4 When the operation is completed, click **OK**.
- 5 Browse to the location specified and verify the file download.

Redundant Configurations for Virtual Editions

The RealPresence Resource Manager system, Virtual Edition now allows virtual editions to be configured in redundant configurations with the purchase of a High Availability license feature. You must do the following to be able to configure the new feature after you have upgraded your license.

To configure a virtual edition for redundancy after upgrade:

- 1 Create a system backup file.
- 2 Upgrade your system.
- 3 Restore the newly-upgraded system with the system backup file.

Upgrading a Polycom Resource Manager System

This chapter provides instructions for upgrading a non-redundant Polycom Resource Manager system. See [Upgrading a Redundant Polycom RealPresence Resource Manager System](#) for instructions on upgrading a redundant Polycom 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 and all services are unavailable. In addition, the serial console appears inactive; nevertheless, 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.

To upgrade to the Resource Manager system software, complete the following tasks:

- 1 [Download the Software Upgrade File](#)
- 2 [Perform the Software Upgrade](#)
- 3 [License Your Upgraded System](#)
- 4 [Upload Endpoint and Peripheral Software Updates](#)
- 5 [Verify the Upgrade](#)
- 6 Optionally, [Upgrade a Virtual Edition with the New High Availability Feature](#)

Download the Software Upgrade File

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

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 <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 version of 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.

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.

The system cannot be upgraded while in HTTPS mode if using Mozilla Firefox. You must either switch the RealPresence Resource Manager system to HTTP or do the upgrade using Microsoft Internet Explorer.

To upgrade the RealPresence Resource Manager software:

- 1 Go to **Admin > Maintenance > System Log Files** and verify that the **Current Log Level** is set to **Info**.
- 2 Go to **Admin > Maintenance > Server Software Upgrade**.
- 3 From the **Server Software Upgrade** page, 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.



Internet Explorer Recommended

The system cannot be upgraded while in HTTPS mode if using Mozilla Firefox. You must either switch the RealPresence Resource Manager system to HTTP or do the upgrade using Microsoft Internet Explorer.

DO NOT close the upload page while the upgrade is taking place.

- 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.
- 8 If you are upgrading a RealPresence Resource Manager system, Virtual Edition previous to 8.2, your system will not be accessible until you add it to the RealPresence Platform Director for licensing and monitoring.

License Your Upgraded System

Some releases require an updated license file. In particular, if your upgrade includes newly ordered features, you will need to update your license.

Use the appropriate instructions below:

- [License an Appliance Edition](#)
- [License a Virtual Edition](#)

License an Appliance Edition

Major releases of RealPresence Resource Manager require a new license. For example, when you upgrade from 8.3 to 8.4, you will need to re-license your system. After upgrading your appliance edition, you may need to upload a new licensing file if your upgrade order includes new features. You must use Internet Explorer to access the RealPresence Resource Manager system if you want to upload a new license file.

To update the license file:

- 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.

License a Virtual Edition

Virtual Edition licensing is handled through the RealPresence Platform Director system. See the *RealPresence Platform Director System Administrator's Guide* for information on updating your license.

Typically, you only have to update your Virtual Edition license when you purchase new features.

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 Resource Manager System Operation Guide*.

Verify the Upgrade

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

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 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.

Upgrade a Virtual Edition with the New High Availability Feature

With version 8.4, RealPresence Resource Manager system, Virtual Edition supports redundant servers to enable high availability. This feature requires a new license and you will also need to deploy a new virtual edition instance.

Older versions of RealPresence Resource Manager system, Virtual Edition are deployed with only one NIC. Two are required for redundant configurations. You must deploy a new instance of an 8.4 version of the software to update the number of available NICs.

To upgrade your virtual edition to 8.4 AND add high availability support:

- 1 Ensure you have added the high availability feature license to your RealPresence Platform Director system. See the *RealPresence Platform Director System Administrator Guide* for detailed information.
- 2 Backup your 8.3 system as a precaution.
- 3 Upgrade your system to 8.4.
- 4 Backup your 8.4 system. You will restore this backup to a newly-deployed 8.4 instance.
- 5 Shut down the 8.4 system. You will no longer be using this system.
- 6 Deploy a new 8.4 instance of RealPresence Resource Manager system, Virtual Edition. You can do this using your virtual environment tools or RealPresence Platform Director. See the *RealPresence Resource Manager Getting Started Guide* for detailed information.
- 7 Restore the 8.4 backup to your newly-deployed 8.4 RealPresence Resource Manager system, Virtual Edition.
- 8 Deploy an additional RealPresence Resource Manager system to use as your secondary server.
- 9 Follow the instructions in the *RealPresence Resource Manager System Operations Guide* for how to enable a redundant configuration.

Upgrading a Redundant Polycom RealPresence Resource Manager System

This chapter provides instructions for upgrading a redundant RealPresence Resource Manager system. See [Upgrading a Polycom Resource Manager System](#) for instructions on upgrading a non-redundant 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 most of the upgrade process, 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.

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



Upgrading a Virtual Edition

RealPresence Resource Manager system, Virtual Edition does not support redundancy. If you have a Virtual Edition, see [Prepare to Upgrade a Virtual Edition](#).

About Redundancy and Upgrading a Redundant RealPresence Resource Manager System

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 anytime 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 using the virtual IP address or the virtual FQDN, the **Redundant Configuration** page shows:

- A redundant system is fully operational when the redundant server is the active server and the primary server is the inactive server.
- Both servers have a **Machine Status** of ON.

When upgrading a redundant RealPresence Resource Manager 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 RealPresence Resource Manager system servers is powered on at any given time. Be sure to follow these procedures carefully.

To upgrade a redundant RealPresence Resource Manager system, complete the following tasks:

- 1 [Request a Software License Upgrade File.](#)
- 2 [Download the Software Upgrade File.](#)
- 3 [Back Up the Redundant System.](#)
- 4 [Reset the Redundant System to be a Standalone Server](#)
- 5 [Back Up the Standalone System](#)
- 6 [Perform the Software Upgrade on Both Standalone Servers.](#)
- 7 [Reconfigure the Standalone Servers for Redundancy.](#)
- 8 [Verify the Upgrade](#)

Request a Software License Upgrade File

You will need a software upgrade license file for the primary server in a redundant RealPresence Resource Manager system configuration.

To request a software license file:

- 1 In a separate browser page or tab, log into the RealPresence Resource Manager system server as an administrator using the virtual IP or virtual FQDN.
- 2 Navigate to **Admin > Server Settings > Licenses** and verify that the server type is Primary.
If the server type is not primary. Perform a failover and repeat step 1.
- 3 Go to **Admin > Server Settings > Licenses** and record the RealPresence Resource Manager system server serial number.
- 4 Go to <http://support.polycom.com>.
- 5 In the **Licensing & Product Registration** section, select **Activation/Upgrade**.
- 6 Log in or **Register for an Account**.
- 7 Select **Site & Single Activation/Upgrade**.
- 8 In the **Site & Single Activation** page, enter the serial number you recorded.
- 9 Click **Next**.
- 10 Accept the **EXPORT RESTRICTION** agreement.
- 11 In the new **Site & Single Activation** page, enter the serial number listed on your License Certificate and enter the license number (shipped with the product) and click **Activate**.
If retrieving licenses for a redundant system, repeat this step for each server in your configuration.
- 12 In the **Key Code** field, click **click here to download** to retrieve and save your license files.

Download the Software Upgrade File

The software upgrade file is generally available on the Polycom support website.

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 <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 version of 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.

Back Up the Redundant System

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

For more information about backing up your system, see the chapter called “*System Backup and Recovery Operations*” in the *Polycom RealPresence Resource Manager System Operations Guide*.

To backup the RealPresence Resource Manager system:

- 1 Log in to the RealPresence Resource Manager system *using the virtual IP address or the virtual FQDN*.
- 2 Navigate to **Admin > Dashboard** to view the **Redundancy Status** pane and verify that both servers are ON.
- 3 From the RealPresence Resource Manager system web interface, go to **Admin > Backup/Restore System Settings**.
- 4 When the **Backup/Restore System Settings** page appears, click **Create and Download a Backup Archive**.
- 5 When the system archive file has been created, you are asked if you want to continue. Click **Yes**.
- 6 Browse to a location on your system, enter a unique **File name**, and click **Save**.
A **File Download** dialog box displays the progress of the download operation.
- 7 When the operation is completed, click **OK**.
- 8 Browse to the location specified in step 3 and verify the file download.

Reset the Redundant System to be a Standalone Server

Use this procedure to discontinue redundancy, but only when the system is in a valid redundant state.

To discontinue a redundant Polycom Resource Manager system configuration when the system is in a valid redundant state:

- 1 Log into the system *using the virtual IP address or the virtual FQDN*.
- 2 Go to **Admin > Server Settings > Redundant Configuration**.
- 3 On the **Redundant Configuration** page, click **Reset Redundant Configuration**.
The two servers restart as single servers.

Back Up the Standalone System

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

For more information about backing up your system, see the chapter called “*System Backup and Recovery Operations*” in the *Polycom RealPresence Resource Manager System Operations Guide*.

To backup the RealPresence Resource Manager system:

- 1 Log in to the RealPresence Resource Manager system.
- 2 From the RealPresence Resource Manager system web interface, go to **Admin > Backup/Restore System Settings**.
- 3 When the **Backup/Restore System Settings** page appears, click **Create and Download a Backup Archive**.
- 4 When the system archive file has been created, you are asked if you want to continue. Click **Yes**.
- 5 Browse to a location on your system, enter a unique **File name**, and click **Save**.
A **File Download** dialog box displays the progress of the download operation.
- 6 When the operation is completed, click **OK**.
- 7 Browse to the location specified in step 3 and verify the file download.

Perform the Software Upgrade on Both Standalone Servers

Perform these steps for each server in your redundant configuration.

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 offline 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 in order to perform an upgrade.

To upgrade the RealPresence Resource Manager software:

- 1 Go to **Reports > System Log Files** and verify that the **Current Log Level** is set to **Info**.
- 2 Go to **Admin > Maintenance > Server Software Upgrade**.
- 3 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](#) on page 6.
- 4 Select the **.bin** file and click **Open**.
The **.bin** file uploads to the system.



Browser Requirements for File Uploads

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

DO NOT close the upload page while the upgrade is taking place.

- 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.

Reconfigure the Standalone Servers for Redundancy

For detailed instructions on how to configure RealPresence Resource Manager for redundancy, see the "System Redundancy" chapter of the *Polycom RealPresence Resource Manager System Operations Guide*.

Upload the New License File

This topic describes how to upgrade a licensed redundant system. You only need to upload one upgrade license file.

To license a redundant system:

- 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.

Verify the Upgrade

After upgrading your system, you should verify that it was successful.

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 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.