NBX® R6.0 System Software Upgrade Instructions

Before you begin to upgrade your NBX software, read ALL of these instructions and all of the Release Notes (the readme.pdf file on the NBX Resource Pack).

Important notes:

- To upgrade an NBX system to R6.0 software, you *must* first upgrade to NBX Release **R5.0**. To upgrade an NBX system to R5.0 software, you *must* first upgrade to NBX Release **R4.3** or higher.

- If you do not choose to retain your database during the upgrade reboot operation, the configuration reverts to the default database.

- The record format for call data records has changed at R6.0 to XML. See the information about CDR and NBX Call Reports later in this document.

- To run NBX system software R6.0, you must install a license key. A license key is required only for upgrading to major releases, RX.X. All minor releases, RX.X.X, use the corresponding major release license key.

- Supervisory Domains are a new feature at R6.0. In NBX R5.0, Supervisory Monitoring was supported for calls that were handled by Hunt Groups, ACD Groups, and Route Points. When you upgrade an R5.0 system to R6.0, all existing groups that have had their Supervisory Monitoring passwords changed from the default setting will have new Supervisory Monitoring Domains created automatically. If a group did not have its default password changed in R5.0, no new Supervisory Domain is created for that group. The new Supervisory Monitoring Domains will have these characteristics:

  - All the relevant information from R5.0 groups is transferred to the new R6.0 Supervisory Monitoring Domains. For example, the members of a new Supervisory Monitoring Domain will be the same members of the Hunt Group or the ACD Group that was created in R5.0.

  - The name of each new Supervisory Monitoring Domain that is created during the upgrade process will be the group name + the group number of the Hunt Group or the ACD Group that had Supervisory Monitoring enabled. The new password will be Group's extension + the old supervisory monitoring password. For example, if an ACD Group at extension 4000 had password 1234 in R5.0, then the new Supervisory Monitoring Domain password in R6.0 will be 40001234.

  - The tones that are enabled for a new Supervisory Monitoring Domain would the same tones that were in effect for the Hunt Group or ACD Group before the upgrade.

  - The call type settings default to incoming group calls only.

- The record format for NBX call data records has changed at R6.0 to XML. However you can choose to create calling records in both XML and CSV format for a defined period. See the information about CDR later in this document.

FIRST: Backup Your Database and Licenses

1. Log on to the NBX NetSet utility as administrator. (Be sure to use a lower case "a" when typing administrator as the username, the NBX operating system is case-sensitive.)

2. Select **System Maintenance > System Backup**. Enable **Include NBX Voice Mail** and **Include NBX Licenses**, and then click **Backup**.

   A new feature of R6.0 is the ability to backup your licenses in the same operation as your system backup. You can still backup your licenses separately by clicking **Licensing and Upgrades > License** and then click the button labeled Backup.

   The backup process creates a .tar file that you save in a location of your choosing. For more information about this process, see the online help.

SECOND: Remove Obsolete System Software (NBX 100)

To be sure that there is enough room on the hard disk, 3Com recommends that you retain the current version and only one or two previous versions of software on an NBX 100 system. V3000 and V5000 systems have larger disks, but it is good practice to remove old, unneeded versions from those systems as well.

To remove an old version of software:

1. Log on to the NBX NetSet utility as administrator.

2. Click **Licensing and Upgrades > Software Upgrade**.

3. From the **Select version to remove** list, click the software version that you want to remove.

4. Click **Remove**.

5. Repeat steps 3 and 4 until you have deleted all of the older versions that you want to remove.

THIRD: Upgrade the System Software

You can load the new system software at any time. The system does not begin running the new software until you select the new system software for a reboot operation. You should plan to reboot to the new software at a time outside of normal business hours. During the reboot operation, new calls cannot be initiated and external calls are terminated.

Installing the System Software License - R4.3 Versions

If you are running R4.3 or a later release of R4.3, you can enter the R6.0 license key and then upgrade to R5.0, which you must do before you can upgrade to R6.0. When you enter the R6.0 license key, the NBX system accepts the license key as valid for an unknown feature. When you upgrade and reboot to the new software, the license takes effect. To enter a system software license:

1. Log on to the NBX NetSet utility as administrator.

2. Click **Licensing and Upgrades > Licenses** and then click **Add**.

Installing the System Software License - R4.2.7 and Prior Releases

If your NBX system software is R4.2.7 or a previous release, you cannot enter the license key for R6.0 before you upgrade because the NBX system software will not recognize the license as valid. Use these steps to upgrade to R4.3, then R5.0, and then to R6.0:

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1. Upgrade to R4.3. See "Upgrading the System Software" later in this document for details.

2. Reboot to R4.3. See "Rebooting the System" later in this document for details.

3. When you see the warning message that indicates you must install a license, click the License button and enter the R6.0license.

4. Upgrade to R5.0 and then to R6.0.

Restricted Operation When Running R4.3 or Higher Without a Valid License

If you reboot the NBX system to R4.3 or higher without installing the required system software license, the NBX system remains operational with these restrictions:

- The NBX NetSet utility is not available. If you log on using the administrator ID and password, a message appears giving you two options:

  o You can click the **Reboot** button to go to a reboot screen and reboot to a previous NBX software release.

  o You can click the **License** button to go to a license screen and enter a license key.

- Each NBX telephone display panel periodically displays a NO LICENSE message.

- Auto Discovery is turned off for all device types.

- Voice mail messages are not allowed.

- The Automated Attendant software is not operational.

- The ability to configure user groups and Automated Attendants from a telephone is not operational.

- If you access the NBX system using the NCP COM1 port, the NBX system sends a message to the application indicating that a required software license has not been installed.

Installing a valid system software license removes all restrictions without a reboot operation.

License Considerations

The *NBX Administrator's Guide* includes information on these situations that require specific actions because of the system software licensing mechanism:

- Chassis or Disk Tray Replacement

- Licenses for Future Releases

- Downgrading to Previous Releases

Upgrading the System Software

You can load the new system software using the NBX NetSet Software Upgrade process at any time. The system does not begin running the new software until you select the new system software for a reboot operation.

1. Logon to the NBX NetSet utility as administrator.

2. Click **Licensing and Upgrades > Software Upgrade**.

3. Click **Browse** and locate the install folder on the NBX Resource Pack DVD or, if you downloaded the file, the folder where the upgrade file resides.

4. Select the appropriate .TAZ file

5. Click **Upgrade**. The software begins uploading to the NBX system.

6. The NBX NetSet utility displays a confirmation box when the upload process has been completed.

FOURTH: Select the New Software and Reboot the System

Plan to complete this step outside of normal business hours. The NBX system is not operational during the reboot. New calls cannot be initiated and external calls are terminated.

CAUTION: DO NOT interrupt the power to the NBX system during the reboot operation. Loss of power can result in a non-recoverable error.

1. Logon to the NBX NetSet utility as administrator.
2. Click **System Maintenance > Reboot / Shutdown**.
3. From the **Select Version** list, select the version number of the new software that you just installed, and then click **Reboot**.
4. A system prompt asks if you want to retain your existing configuration database when booting the new version. To continue to use your current configuration (recommended), click **Yes**.

FIFTH: Backup Your Database Again

Whenever you change the software version, back up your data so that you have an up-to-date database to restore in the event of an error.

1. Logon to the NBX NetSet utility as administrator.
2. **Click System Maintenance > System Backup**, and then click **Backup**.

Backup and Restore Notes

- An R5.0 backup file is restorable on an R6.0 system. The Restore process converts the R5.0 database to R6.0 form.

NBX Call Reports

The Call Data Record (CDR) format has changed at NBX R6.0 to XML. The XML calling data records created by an NBX 6.0 system must be viewed with NBX Call Reports R6.0.

NBX Call Reports R6.0:	NBX R6.0 creates CDR records in XML format. In the NBX NetSet utility, **System Maintenance > Call Reporting**, select the option **Enabled for XML**. NBX R6.0 also allows you to choose to create records in the old CSV format for backwards compatibility with NBX Call Reports R5.0. NBX Call Reports R6.0 cannot view CSV calling data.
NBX Call Reports R5.0:	If you want your new calling data to be in a format that is compatible with your older data, you can continue to use NBX Call Reports R5.0 and use the NBX NetSet utility to specify that your calling data be created in the old CSV format. **NOTE: Data that is recorded in CSV format does not include calling data for new R6.0 features.**
	In the NBX NetSet utility, **System Maintenance > Call Reporting**, select the option **Backward compatible for CSV**. This is the default option when you upgrade from R5.0 to R6.0. To begin recording data that is compatible with NBX Call Reports R6.0, you must manually select the XML option in the NBX NetSet utility.
	You can choose to record calling data in both formats simultaneously to allow you gradually change from .CSV to .XML data. However, the system stops dual recording after seven days to conserve system resources.

To upgrade to NBX Call Reports R6.0:

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1. Upgrade to NBX Call Reports R6.0 if you have not already done so.

2. Use the NBX NetSet utility to purge existing call data, **System Maintenance > Call Reporting > Purge Now**.

3. On the **System Maintenance > Call Reporting** page, set your call reporting preferences. For more information, see the online Help.

If Something Goes Wrong During an Upgrade

The system retains the previous version of the NBX software and the NBX NetSet utility allows you to choose which software version to use when you reboot the system. This selectable boot capability lets you restore an earlier operating environment.

If the system is not operating as expected after an upgrade, re-check the installation steps in this file to ensure that you have not forgotten any steps (especially in the section, "Converting the Database").

If you are still unsuccessful, boot your old version of software to return to your previous configuration.