

Before you begin to upgrade your 3Com® NBX® software, read ALL of these instructions and all of the Release Notes (the readme.pdf file on the NBX Resource Pack CD). For details on each screen in the NBX NetSet™ utility, click the Help button on the screen.

! CAUTION: To upgrade an NBX system to R5.0 software, you *must* first upgrade to NBX Release **R4.3** or higher. If you upgrade from R4.2.6 or an earlier release, and then later reboot to that earlier release, some 3Com telephones become disabled and the error message "checksum error" appears in the telephone display panel.

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

Be aware that Call Data Reporting 5.0 does not work with CDR records at R4.3 or below. See the information about CDR 5.0 later in this document.

FIRST: BACK UP YOUR DATABASE AND LICENSES

1. Make a note of the version of software that you are currently running. You might need to know this in a later step of the upgrade process. You can see the version number on the NBX NetSet utility opening screen or on an NBX Telephone display panel by picking up the handset, pressing the Feature button, and then dialing 837.
2. Start the NBX NetSet utility: Open Microsoft Internet Explorer, enter your NBX system's IP address, and then press Enter.
3. Log on to the NBX NetSet utility as administrator. (Be sure to use a lower case "a" when typing administrator as the username because the NBX operating system is case-sensitive.)
4. Select Operations > Manage Data and click the button labeled Backup Database.
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 for Manage Data.
5. Select Operations > Manage Data and click the button labeled Backup Licenses.
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 for Manage Data..

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. To remove an old version of software:

1. Log on to the NBX NetSet utility as administrator.
2. Select Operations > Software Upgrade.
3. From the "Select version to remove" list, click the software version that you want to remove.
4. Click Remove.
5. Repeat until you have deleted all of the older versions that you want to remove.

Important Upgrade License Notes

- To run NBX system software release R5.0, 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.
- To upgrade an NBX 100 or V5000 system to release R5.0 you must first upgrade to release R4.3.
- To upgrade an NBX V3000 system to release R5.0, you must be running R4.4 or higher.

THIRD: REMOVE ANY OTHER APPLICATIONS SOFTWARE

Remove any software that you do not want to be carried forward to the new release (for example, your existing CDR Call Reports).

FOURTH: 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 will be 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 R5.0license key and then upgrade to R5.0. When you enter the R5.0 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. Select Operations > Licenses > Add License.

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 R5.0 before you upgrade because the NBX system software will not recognize the R5.0 license as valid. Use these steps to upgrade to R4.3 and then R5.0:

1. Upgrade to R4.3. See “Upgrading the System Software” on the next page for details.
2. Reboot to R4.3. See “Rebooting the System” on the next page for details.
3. When you see the warning message that indicates you must install a license, click the License button and enter the R5.0license.

Restricted Operation When Running R4.3 or R5.0 Without a Valid License

If you reboot the NBX system to R4.3 or R5.0 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 screen appears giving you two options:
 - You can click the Reboot button to go to a reboot screen and reboot to a previous NBX software release.
 - 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 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. Log on to the NBX NetSet utility using the administrator ID and password.
2. Select Operations > Software Upgrade.
3. Click Browse and locate the install folder on the CD-ROM or, if you downloaded the file, the folder where the upgrade file resides.
4. Select the appropriate .TAZ file. For example, if the software release is R5_0_1, the correct file for the NBX 100 is labeled R5_0_1.taz; for the SuperStack 3 NBX system, the file is labeled R5_0_1_750.taz.
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.

FIFTH: REBOOT THE SYSTEM

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

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

1. Select Operations > Reboot/Shutdown.
2. From the Select Version list, select the version number of the new software that you just installed, and then click Reboot.
3. 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.

SIXTH: BACK UP 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. Log on to the NBX NetSet utility as administrator.
2. Select Operations > Manage Data > Backup.

Backup and Restore Notes

- A R4.3 or higher backup is restorable on an R5.0 system. The Restore process converts the R4.3 or higher database to R5.0 form.
- You cannot restore an R5.0 backup on to a system running R4.2.x or earlier releases.

SEVENTH: INSTALL CDR (IF NECESSARY)

The Call Data Record format has changed at NBX R5.0. If you are using NBX Call Reports R4.3 or lower, and you want to continue to use NBX Call Reports to view calling data, you must do the following:

1. Uninstall NBX Call Reports, if you have not already done so.
2. Use the NBX NetSet utility to purge existing call data (Reports > Call Reporting > Purge CDR).
3. Install NBX Call Reports R5.0 or higher.

If you are upgrading from R4.4 or higher, perform the following actions to install CDR:

1. Use NetSet to purge existing call data (Reports > Call Reporting > Purge CDR)
2. Install NBX Call Reports 5.0 or higher.

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 and contact your 3Com NBX Voice-Authorized Partner.