



ALTIGEN
COMMUNICATIONS

410 East Plumeria Drive • San Jose, CA 95134
www.altigen.com • +1 (408) 597-9000

MAX Communication Server Release 7.0 Update 1

Upgrade Guidelines

**Intended audience:
AltiGen Authorized Partners**

April 24, 2014



Introduction

This guide covers the following:

- The new features in MAXCS 7.0 Update 1. See [Enhancements Included in Release 7.0 Update 1](#) on page 2.
- The process to upgrade IP 805 phones that were running on MAXCS 7.0 to the new format for Release 7.0 Update 1. See [IP 805 Upgrades](#) on page 5.
- Guidelines for upgrading from earlier releases of MAXCS to Release 7.0 Update 1. See [Software Upgrade Path](#) on page 4.

For directions on migrating to MAXCS Private Cloud, refer to the *Partners Methods and Procedures for MAXCS Private Cloud* guide, which is available from your AltiGen Communications sales representative.

Enhancements Included in Release 7.0 Update 1

The MAXCS 7.0 Update 1 release includes enhancements in the following areas (refer to the *MaxCS 7.0 Update 1 New Features Guide* or the appropriate MaxCS 7.0 Update 1 manual for full details):

- **Operating System Support** – Because Microsoft is ending support for Windows XP effective in April, 2014, MaxCS 7.0 Update 1 does not support that operating system. MaxCS 7.0 Update 1 also supports Windows 2012 R2.
- **Location-Based E911 Configuration (For Relocation)** – E911 Caller ID (CID) information is sent to PSAPs (Public Safety Answering Point) when a user calls 911 from an IP phone. A new feature has been added to MaxCS that allows administrators to configure an E911 Location ID for each geographic location. Each AltiGen IP phone can then be assigned an appropriate E911 Location ID.

This feature is not designed for use with stationery phones, only for phones that are moved from one physical location to another.

Configuring E911 Location IDs ensures that emergency calls placed from these IP phones:

- ▶ Will call the appropriate local PSAP, based upon the phone's physical location.
- ▶ Will transmit Caller ID details that will help emergency response teams find the right location.

Refer to the new chapter in the *MaxCS Administration Manual* for full details.

- **Salesforce Integration** – Salesforce.com provides a CTI toolkit to telephony-enable its cloud-based CRM application. When enabled, a softphone control panel appears in the web browser, for agent call control.

AltiGen encapsulates the CTI toolkit into a connector for MaxCS Release 7.0 Update 1, to integrate an AltiGen IP PBX system with Salesforce.com.

A Salesforce Integration Seat license has been added to the License Information and Client Seat License Management pages.

Refer to the *MaxCS Connector for Salesforce.com* application notes for full details.

- **AltiReport Enhancements** – AltiReport uses an email server to send scheduled reports. In MaxCS 7.0 Update 1, AltiReport can now communicate with encrypted email servers such as the Google mail server (Gmail) or the Hotmail server.



AltiReport detects the requirements of the specified email server automatically; no configuration is needed to indicate whether the email server requires encryption.

When using an encrypted email server, for authentication purposes the *Sender Email Address* entry must be the same as the *SMTP Account Name* entry. The remote email server does not allow users to use a different sender email address than the real email account.

Refer to the *AltiReport Manual* for full details.

- **Client Enhancements** – The following client enhancements are introduced in MaxCS 7.0 Update 1:
 - ▶ The MaxCS 7.0 Update 1 clients now support Windows 8.1 (64-bit).
 - ▶ MaxSupervisor – Support for up to 50 concurrent MaxSupervisor connections, improved data receiving and display performance. In addition, there is a new automatic re-sort interval for Agent View and Agent Status. Refer to the *MaxSupervisor Manual* for full details.
 - ▶ MaxCommunicator, MaxAgent, and MaxSupervisor – Users can now choose to display either the local time or the server time for voicemail messages. Also, the application icon now stays on the Windows task bar and in the Windows system tray when you minimize these applications.

- **MaxOutlook Support for Outlook 2013** – The MaxCS 7.0 Update 1 release of MaxOutlook supports Microsoft Outlook 2007, 2010, and 2013.

Note: Only the 32-bit version of Microsoft Outlook is supported.

Users who upgrade their Microsoft Outlook application from version 2007/2010 to Outlook 2013 will need to reinstall MaxOutlook.

- **Move IP Address between Trusted and Malicious Device List** – In some rare scenarios, the MaxCS server can capture regular IP address and add them to the *Malicious SIP Device* list.

You can now more easily and directly move IP addresses from the Trusted list to the Malicious list. Within MaxCS Administrator, select **SIPSP > Board Configuration > Advanced Configuration**. Two buttons have been added to this page, to move an IP address from one list directly to the other

- **Advanced Call Router Enhancements** – Advanced Call Router (ACR) allows verification of incoming call information against the database. In earlier releases, ACR only confirmed that the specified information existed; it left the transfer target to be configured in the rule settings. This design mandated that every transfer target needed a unique routing rule, which meant that customers had to create numerous rules to handle calls.

In MaxCS 7.0 Update 1, the routing target information can be retrieved from the database record. This means that customers need to create (and maintain) far fewer rules to process calls.

To accomplish this, rules now have an additional Target action, Route by Query Result. Refer to the *Advanced Call Router Manual* for full details and examples.

- **Block Unauthorized SIP Invite Requests** - MaxCS 7.0 Update 1 includes a filter to block unauthorized SIP Invite requests. When the MaxCS server receives a SIP Invite request, if the IP address or the caller source is NOT in one of the following lists, the call will be ignored (dropped):
 - ▶ IP address is in the MaxCS registered IP extension list
 - ▶ IP address is in the configured SIP Trunk list



- ▶ IP address is in the IP dialing table list
- ▶ IP address is in the SIP Allow IP list
- ▶ The caller is from another AltiGen system
- ▶ The caller is from an AltiGen IP phone

The filter is disabled by default. To enable the filter, add the following registry entry and press **VM&SP Log Dump** under the **Diagnostics > Trace** menu (or just restart the system).

HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\AltiGen Communications, Inc.\AltiWare\Service Providers\SIPSP

"BlockSIPUnauthorizedCall"=dword:00000001

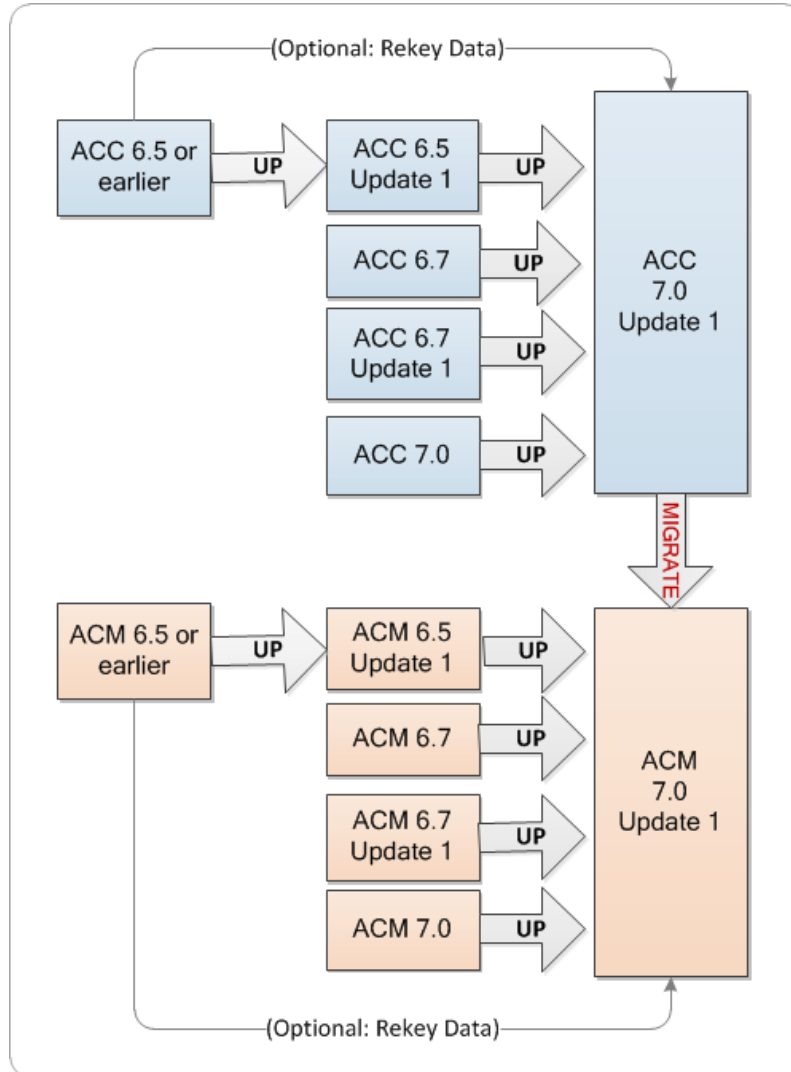
Software Upgrade Path

The diagram on the next page shows the software upgrade path (not license registration) to convert older MAXCS databases to the 7.0 Update 1 version.

It is critical to follow the upgrade instructions to avoid losing configuration data.

Note: If you are upgrading from release 6.5 or earlier, you have two options:

- You can rekey the data in Release 7.0 Update 1, or
- You can upgrade to release 6.5 Update 1, and then upgrade from 6.5 Update 1 to Release 7.0 Update 1



IP 805 Upgrades

If you are upgrading from MaxCS 7.0 and you have IP 805 phones that were configured for Release 7.0, we recommend that you upgrade those IP phones **before** you upgrade the MAXCS software.

This upgrade is necessary due to changes to the IP 805 programmable keys configuration from Release 7.0 to Release 7.0 Update 1.

If you do not run this upgrade tool before (or after) you upgrade MAXCS, then users will lose any custom programming that they had made to the programmable keys on their IP 805 phones.

1. Before you upgrade MaxCS, copy the file *UpgradeIP805.exe* to the C:\Altiserv\Exe\ folder. You can find this file in the \Tools folder on the MaxCS Release 7.0 Update 1 DVD.
2. Back up all DBB files in this folder: C:\Altiserv\OpenLdap.
3. While the MaxCS server is still running, run *UpgradeIP805.exe* to convert the IP805 phone storage configuration to the newer format.



4. When you are prompted about upgrading the IP 805 Function keys, click **Yes**.
5. Upgrade MaxCS 7.0 to MaxCS 7.0 Update 1.

You can also run this tool after you have upgraded; it requires a system restart.

1. Copy the file *UpgradeIP805.exe* from the \Tools folder to the C:\Altiserv\Exe\ folder.
2. Back up all DBB files in this folder: C:\Altiserv\OpenLdap.
3. Run *UpgradeIP805.exe* to convert the IP805 phone storage configuration to the newer format.
4. When you are prompted about upgrading the IP 805 Function keys, click **Yes**.
5. The tool will indicate if no IP extensions were found or if no IP 805 phones were found. Otherwise, it will confirm the total number of phones that were successfully upgraded.

If the conversion failed, it will inform you with an error message and provide an error code to use for troubleshooting.

Upgrade Process: MAXCS 7.0 Update 1 On-Premise

For detailed upgrade steps, refer to section 1 of the Readme file in the *MaxCS_ACM* folder on the installation DVD.

Considerations:

- If you are upgrading an NFR system, you must obtain the new license file (EXCTL.DAT) **before** you begin the upgrade process. Otherwise, your licenses will become invalid after you perform the upgrade.
 - If Exchange integration was used in the previous version of MaxCS server, you must uninstall the Outlook client before you install MaxCS Release 7.0.
1. Run the Backup & Restore tool to back up the existing configuration, voice mail messages, and greetings.
 2. Perform the 7.0 Update 1 product registration process and obtain the 7.0 Update 1 license file.
 3. Insert the MAXCS ACC or ACM 7.0 Update 1 DVD and run the *setup* file.
 4. Follow the instructions onscreen to complete the upgrade processes.

Upgrade Process: MAXCS 7.0 Private Cloud

For instructions on migrating a MAXCS 6.5 – 7.0 installation on an on-premise hardware chassis to MAXCS Private Cloud, follow the steps in the *Partners Methods and Procedures for MAXCS Private Cloud* guide, which is available from your AltiGen Communications sales representative.

For any upgrade issues or questions, please contact AltiGen Technical Support:

410 E. Plumeria Drive

San Jose, CA 95134, USA

TEL: (888) ALTIGEN or (408) 597-9000

FAX: (408) 597-9020

Partner web site: <https://partner.altigen.com>