

MaxACD Release 7.0 Upgrade Guide

This document provides instructions for upgrading a MaxACD Release 6.5.8 installation to Release 7.0.

Altigen is providing a tool to assist in this upgrade process; the *Migration Tool*. With this tool, customers can migrate their existing configuration in MaxACD 6.5.8 to MaxACD 7.0 in a few simple steps.

Important Hardware Requirements

Before you deploy MaxACD 7.0 or migrate from an earlier release, make sure that your Lync / Skype for Business servers (including the front-end servers, mediation servers, and SQL servers) all meet the requirements as published by Microsoft. Most critical are the CPU processor speed, SSD drives, and memory requirements.

For those organizations who may be upgrading from MaxACD Release 6.5.8, be aware that Release 6.5.8 uses media resources directly from the HMCP engine that is built in MaxACD. MaxACD 7.0, however, utilizes voice media and conference resources on the Lync/Skype front-end and back-end servers. In other words, MaxACD 7.0 may have performance issues if your Lync/Skype4Business Servers' hardware does not meet Microsoft's requirements, **even if MaxACD Release 6.5.8 performed fine on the same hardware.**

For more information, you can search for "Lync 2013 hardware requirement" or "Skype for business hardware requirement" on the web. The following articles may also help clarify Microsoft requirements:

[https://technet.microsoft.com/en-us/library/gg398835\(v=ocs.15\).aspx](https://technet.microsoft.com/en-us/library/gg398835(v=ocs.15).aspx)

<https://technet.microsoft.com/en-us/library/dn951388.aspx>

Pre-requisites

In order to use this tool, your system must meet the following requirements:

- You must be upgrading from MaxACD Release 6.5.8
- You must be installing a new version of MaxACD 7.0

Preparation

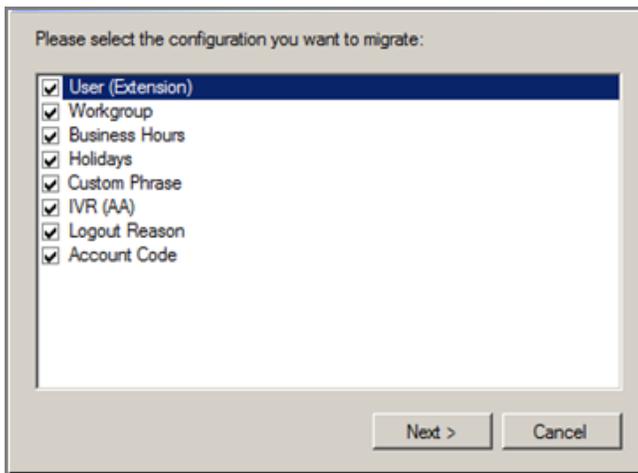
Complete these steps before you run the Migration Tool:

1. Perform a backup on your MaxACD 6.5.8 server (optional, but recommended).
2. Log onto the MaxACD 6.5.8 server and copy the Migration Tool onto that server. This file, *MigrationTool.exe*, is found in the MaxACD installation media.
3. Install .NET Framework 4.0 or above if the system is running an earlier version. (If your MaxACD 6.5.8 installation is an All-in-one deployment, then then the 4.0 .NET Framework is already installed.)
4. Install Desktop Experience.

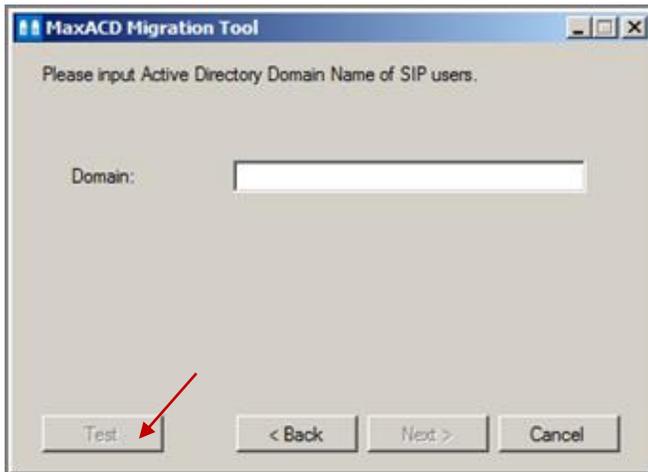
Migration

Follow these steps to upgrade your deployment to Release 7.0:

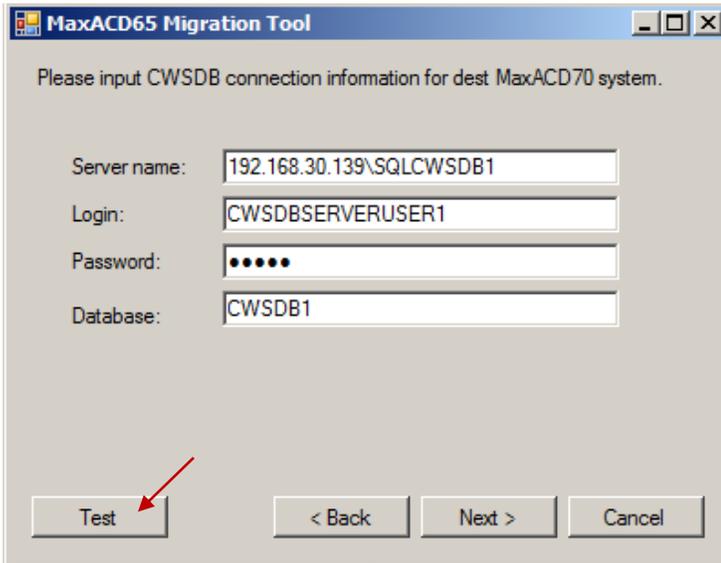
1. First, install MaxACD 7.0 (refer to the *MaxACD all-in-One Deployment Guide* for instructions).
2. Temporarily disable your firewall before you perform these steps. Otherwise, the connection test will fail.
3. Run the Migration Tool on the MaxACD 6.5.8 server.
4. Select the configurations that you want to migrate and click **Next**. (All options are checked by default.)



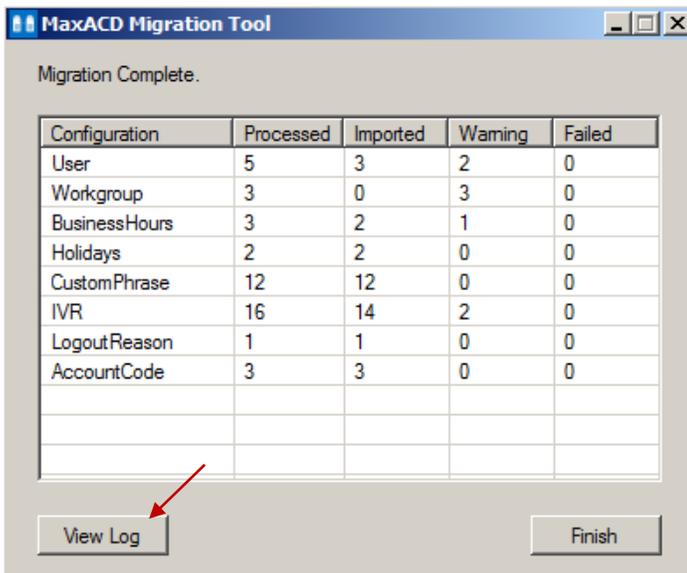
5. On the next panel, enter the Active Directory Domain Name for SIP users.



6. Click **Test** to confirm that the connection to the Domain Server is correct.
7. If the test is successful, the **Next** button will be enabled. Click **Next** to continue the installation.
8. On the next panel, enter the database (CWSDb) connection information for the MaxACD 7 system.
9. Click **Test** to confirm that the connection details are correct.
10. If the text is successful, the **Next** button will be enabled. Click **Next** to begin the migration process.



11. When the migration process has completed, the results will appear on the next page.



12. Click **View Log** to view details if the tool reported any warnings or errors.
13. Restart the MaxACD 7.0 server. Now you can log into the MaxACD Administrator portal to review the configurations.

Post-Migration

After completing the migration process, you will want to check the configurations in the Administrator portal and make other customizations:

1. Configure other items, including:
 - URI routing
 - Caller ID routing
 - Workgroup voicemail
 - Call recording
 - Reports
 - Virtual extensions
 - Most items on the System tab, including details for the server, reports, call recording, multilingual options, SNMP configuration, redundancy, and Presence mapping
 - Remaining user configuration details
 - Workgroup call recording
 - License
2. Configure the new features in Release 7.0. Refer to the *MaxACD New Features Guide* for details.
3. Install and/or upgrade other components manually, such as:
 - MaxAgent (you must uninstall the Release 6.5.8 client)
 - MaxSupervisor (you must uninstall the Release 6.5.8 client)
 - MaxInsight (you must uninstall the Release 6.5.8 client)
 - MaxReports (install this on a new system, so that MaxSupervisor can still generate 6.5.8 reports)
 - VRManager (install this on a new system, so that MaxSupervisor can still use 6.5.8 recording files)
 - Advanced Call Router – (you must uninstall the Release 6.5.8 version)

Note: MaxACD 7 clients cannot be installed on the same system as any MaxCS clients.

New Chat Feature in Release 7.0

MaxACD 7.0 includes a new Chat feature. If you are upgrading from MaxACD 6.5.8 and want to deploy the chat feature, you will need to purchase the following licenses:

- A Chat Server upgrade license (ACD-CHATSVRUPG).
- Agent seat chat upgrade licenses (ACD-AGSEATUPG-C) for those agents who will belong to chat workgroups.

Chat Deployment steps are covered in the *MaxACD Chat Deployment Guide*.

Components No Longer Included in Release 7.0

The following components from Release 6.5.8 are no longer included in MaxACD:

- Voice File Converter
- Custom Phrase Manager (consider WavePad Audio Editing Software from NCH Software)

Parameters from 6.5.8 No Longer Available

With the move to a UCMA architecture, various configuration parameters no longer apply. Following is a list of these parameters, organized by the Release 6.5.8 menus:

- **System > General**
 - Country
 - System Call Park
 - Operator
 - Mediation Server Address
 - Dialtone Pilot Number
- **System > Number Plan**
 - Extension Length
 - Default Password
 - First Digit Assignment
- **System > Call Restriction**
- **System > Country Relevant**
- **System > Audio Peripheral**
- **System > Softswitch Component**
- Voice Mail Configuration
 - Message Management options
 - Recording options
 - SMTP/POP3 options
 - Voicemail distribution list
- Application Extension Configuration
- Trunk Configuration
- Out Call Routing
- **Extension > General**
 - DID Number (Line URI read-only)
 - E911 CID

- Description
- Department
- Language
- IP Extension
- In the Lync Agent section
 - Consolidated Assign Agent License and Enable Agent into one parameter
 - SIP URI and Line URI are read-only
- **Extension > Mail Management**
- **Extension > Notification**
- **Extension > Restriction**
- **Extension > Answering**
 - Call Forwarding
 - Call Handling
- Unassigned Extension Number Configuration
- SIP Device Configuration
- Line Park Configuration
- **Workgroup > Mail Management**
 - Assign Exchange Integration License
 - SMTP/POP3
 - Mail Forwarding options
 - Message Playback options
 - Capacity
 - Press '0' options
- **Workgroup > Queue Management**
 - Application Extension Queue Control
 - Basic Queue Overflow Forwarding and Basic Quit Queue Option are replaced with Advanced Queue Overflow and Queue Prompt features
- **MaxCall Configuration**
- **VoIP > Enterprise Network Management**

AltiGen Technical Support

Authorized AltiGen Partners and distributors and Direct Customers on a Direct Support Plan may contact AltiGen technical support by the following methods.

- You may request technical support on AltiGen's Partner web site, at <https://mspartner.altigen.com>. Open a case on this site; a Technical Support representative will respond within one business day (Tier 1 Direct Customers must call to open a case).
- Call 888-ALTIGEN, choose option 5 from the IVR, or 408-597-9000, option 5 from IVR, and follow the prompts. Your call will be answered by one of AltiGen's Technical Support Representatives or routed to the Technical Support Message Center if outside of normal business hours and no one is available to answer your call.

Technical support hours are 5:00 a.m. to 5:00 p.m., PST, Monday through Friday, except holidays.

If all representatives are busy, your call will be returned in the order it was received, within four hours under normal circumstances. Outside AltiGen business hours, only urgent calls will be returned on the same day (within one hour). Non-urgent calls will be returned on the next business day.

Please be ready to supply the following **required** information when calling in for Support:

- Partner ID
- AltiGen Certified Engineer Tech ID
- Serial numbers for any applicable hardware (chassis, boards, and so on)
- Number and types of boards in the system, if applicable
- MaxACD version number
- Server model
- The telephone number where you can be reached

Be prepared to answer the following questions:

- Is this a virtual or a standalone server installation?
- If this is a virtual installation, it is installed in VMware environment or Hyper-V? What is the version number of the virtual server?
- How much memory and how many CPU's are reserved for MaxACD Server use? Memory and CPU cores should always be dedicated and reserved for MaxACD Server use exclusively.
- Are SSD drives installed? If not, be prepared to describe what NAS devices are installed and whether they are shared or dedicated to the MaxACD server.