MAX Communication Server
Release 8.5 Update 1
**Upgrade Guide**

May 24, 2018

## Contents

This document provides guidelines for upgrading from an earlier version of MaxCS to release 8.5 Update 1.

## Enhancement Included in This Release

## Enhancements Included in Release 8.5 Update 1

The following tables list the enhancements and new features that have been added since the initial release of MaxCS Release 8.5. These features are all included in MaxCS 8.5 Update 1.

Details for most of these features are included in the *MaxCS 8.5 Update 1 New Features Guide*.

## Enhancements in Release 8.5 Update 1

| MaxCS 8.5. Update 1 Enhancements | |
|---|---|
| **Quality Management application** | Assessment tools are typically used by Call Center operations to generate consistent independent evaluations of agent call-handling skills. <br><br> In Altigen's *Quality Management* application, assessments are accomplished by listening to a recorded call while scoring the agent's performance on that call. Refer to the separate document, *MaxCS Quality Management Guide*. |
| **VRM Pro application** | A new application is introduced with this release; VRManager Pro. VRManager Pro offers many security features that were not available in VRManager. <br><br> Refer to the separate guide, *VRManager Pro Manual*. |
| **Multilingual enhancement** | MaxCS has a new option that expands your ability to assign or inherit language settings within AA branches. Each AA has two options in **System** > **Multilingual Configuration** on the *AA* tab: <br><br> • **Single Language** - Specifies the language for that AA. All the prompts played to this trunk caller will be in this language. <br><br> • **Multiple Languages** - This option functions the same as the Multilingual option in previous releases. |

| MaxCS 8.5. Update 1 Enhancements | |
| --- | --- |
| **Additional fields for importing and exporting extension data** | Several additional fields are available when import or export extension data. |
| **New option for automatic Polycom VVX Firmware updates** | A new *Enable Polycom VVX firmware automatic upgrade* option in **System** > **Polycom Configuration** defaults to disabled (unchecked).   This allows you to disable auto-upgrades to extensions during future MaxCS updates. <br><br> MaxCS also has a new algorithm for pushing firmware updates to Polycom phones.  The new process of checking VVX phones, by default, is performed with a 30-second delay between updates. Staggering updates to 30-second intervals prevents the situation where all of your VVX phones try to update at the same time, which, depending upon your bandwidth, might cause problems. |
| **Polycom E911 Location ID updates** | MaxCS can now manage a Polycom phone's E911 Location ID (LID) just as you do Altigen IP Phone LIDs, in **PBX** > **Location Based E911 Configuration**. |
| **Polycom Trio model support** | MaxCS now supports Polycom Trio 8500 and 8800 phones. |
| **System E-911 CID** | You can now configure a system E-911 Caller ID number for MaxCS, on the **System Configuration** > **General** tab. <br><br> When an emergency call is placed, the transmitted CID for the trunk call will be included in the call's Call Detail Record (CDR). In addition, the transmitted CID will be included in the SNMP trap that is automatically logged. |
| **Disk capacity check for recordings** | This release monitors available disk space for four different drives, to ensure that there is sufficient space for voice recordings. In addition, there are new SNMP traps for low-capacity triggers. |
| **Voicemail message retention enhancement** | You can now set a retention length for new, heard, and/or saved voicemail messages. This applies to extensions, workgroups, and huntgroups. |
| **SightMax (ChatBeacon) updates** | The third-party application *SightMax* has been updated and renamed to *ChatBeacon*; MaxCS supports ChatBeacon version 2.0. For instructions, refer to the *MaxCS ChatBeacon Integration Guide*. |
| **RESTful CTI API Support** | MaxCS includes a Web Proxy, which includes a RESTful API. See the separate document, *Altigen Web API*. |

| MaxCS 8.5. Update 1 Enhancements | |
|---|---|
| | A RESTful API is an application program interface (API) that uses HTTP requests to GET, PUT, POST, and DELETE data.<br><br>This must be installed via a separate installation utility—it is not automatically installed via the main setup wizard. |

## *Enhancements in Release 8.5 QuickFix*

| MaxCS 8.5 QuickFix Enhancements | |
|---|---|
| **Administrator Change Log** | The new *Change Log Report* (CLR) allows you to track configuration changes that have been made to MaxCS by administrators through the MaxAdministrator program. |
| **General Security Enhancements** | For increased security, MaxCS now includes:<br><br>• Support for TLS version 1.2<br>• An option to use *only* version 1.2 when TLS is used<br>• Support for public certificates<br>• A new SNMP trap to alert you when your public certificate is close to expiring (if you let public certificates expire, your Polycom phones will no longer register) |
| **Altigen Phone Security Enhancements** | The Altigen IP705, IP710, IP720, and IP720a phones support TLS 1.2 via the new firmware version 2XB3. |
| **Polycom Security Enhancements** | This release includes several Polycom security enhancements:<br><br>• **VVX** —300/310/311, 400/410/411, 500/501, 600/601 phones support firmware version 5.6.0.17325 (VVX 1500 is not supported)<br>This version is required in order to use a public certificate and to use TLS 1.2<br>• **SoundStation —** IP6000/IP7000 phones support firmware version 4.0.13.1445, which supports the use of public certificates, but **does not support TLS 1.2**<br>• **SoundPoint** — SoundPoint models do not support TLS 1.2 or public certificates<br><br>This release also includes a field to specify the location of the Polycom Directory server for a wildcard or SAN public certificate. |

| MaxCS 8.5 QuickFix Enhancements | |
|---|---|
| **MaxCS Client Security Enhancements** | TLS 1.2 is now supported on IPTalk on MaxAgent, MaxCommunicator, and MaxOutlook. |
| **AudioCodes Security Enhancements** | For enhanced security, MaxCS now supports firmware release F6.6.0A.336.004 on the AudioCodes MP1xx and Mediant devices.<br><br>SIP UDP and SIP TLS 1.0 and 1.2 are supported.<br><br>Both Altigen-signed certificates and public certificates are supported.<br><br>For configuration steps, refer to the separate MaxCS AudioCodes configuration guides. |
| **Java Update** | MaxCS now supports Java SE Runtime Environment JRE 8u171. |

## Enhancements in Release 8.5.0.222

| MaxCS 8.5.0.222 Enhancements | |
|---|---|
| **Exchange Server 2016 support** | MaxCS now supports Exchange Server 2016 for Exchange Integration. Refer to the *MaxCS 8.5 Administration Manual* chapter for details. |
| **Outlook 2016 support** | MaxOutlook now supports Outlook 2016. |
| **Windows Server 2016** | MaxCS now supports Windows Server 2016. |
| **Plantronics Headset Support** | MaxAgent and MaxCommunicator now support several Plantronics headsets. |

## Enhancements in Release 8.5.0.215

| MaxCS 8.5.0.215 Enhancements | |
|---|---|
| **Secured MaxAdministrator Connectivity** | Communication between the MaxCS server and MaxAdministrator have been encrypted, for increased security. |

## Applications No Longer Supported in Release 8.5 Update 1

The VRManager application is no longer supported, starting with MaxCS 8.5 Update 1.

If you are currently running any version of VRManager, you will need to upgrade to VRM Pro. No new VRM licenses are required when upgrading from VRManager to VRManager Pro. Refer to the separate guide (the *VRManager Pro Upgrade Guide*) for detailed upgrade instructions.

## Requirements

For full system requirements, refer to the *MaxCS 8.5.1 All-Software Solution Deployment Guide*.

MaxCS Release 8.5 Update 1 supports Softswitch, hardware chassis, and MaxCS Private Cloud.

For on-premise deployments, we recommend that your system have an overall passmark score of 10,000 or greater.

**Important**! Windows 2008 does not fully support TLS version 1.2. Therefore, no version of AltiGen MaxCS Server Software supports TLS 1.2 on Windows 2008 Server.

## Port Information

- When MaxCS or Softswitch is running on a non-Windows 2008/2012 system, BasePort = 49152. When MaxCS or Softswitch is running on a Windows 2008/2012 system, BasePort = 49664 (this is because Windows 2008/2012 have some system services that use ports in the 49152 range). Check your firewall settings and reconfigure them if necessary.

- MaxCS 8.5 uses internal network port 10072 to work with the client applications. Other applications on the users' system should not use this port. Since this is for internal use, no firewall setting should be configured for this port.

## General Considerations

- **NFR** – If you are upgrading an NFR system with MaxCS Release 8.0 or earlier, 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.

- With MaxCS Private Cloud and SaaS-licensed systems, the MaxCS server will check with the AltiGen licensing server when switching starts, and will automatically retrieve the appropriate licensing.

- **MaxCall** – If you use MaxCall, you will need to copy the MaxCall phrases in the C:\PostOffice\App\MaxCall folder to a temporary folder, then copy them back to the folder after the upgrade has been completed.

## Consideration for VLAN Environments with Polycom Phones

Release 8.5 Update 1 includes a new Polycom firmware version for VVX model phones. By default, Polycom firmware is automatically updated during an upgrade.

If you have VVX phones in a VLAN environment, there are various steps you should take BEFORE you perform the upgrade, to ensure a smooth transition to the new firmware.

If you have no previous experience with VVX auto-upgrade behind a VLAN, we *strongly* suggest that you contact Altigen Support well in advance of the upgrade, to plan out the upgrade process with our staff.

## Software Upgrade Path
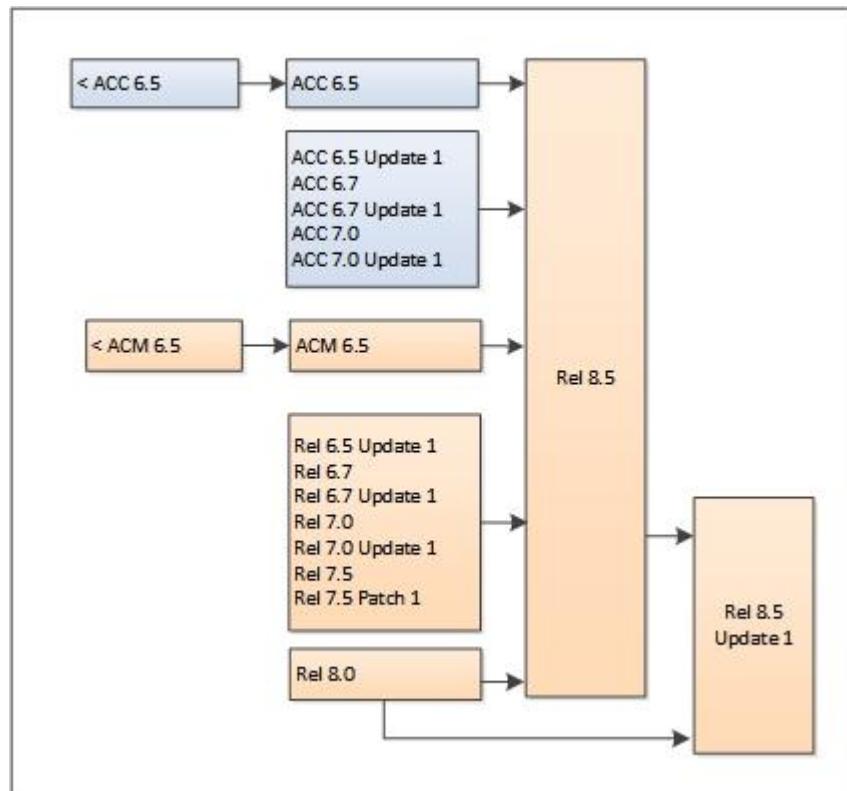


It is critical to follow the upgrade instructions to avoid losing configuration data.

## For Customers Upgrading from Release 8.0

Before you begin the upgrade process, be aware of the following changes that were introduced in Release 8.5, because they may affect your upgrade.

- **Exchange Integration** changed significantly in Release 8.5. Read the *Exchange Integration* chapter of the *MaxCS 8.5 Administrator Manual* carefully before you upgrade. There may be additional steps that you should take for Exchange configuration, depending upon your current environment. For example, you may need to uninstall the Outlook client before you install MaxCS Release 8.5 Update 1.

- **Account Codes** fields were moved In Release 8.5. The fields for extension Account Codes were moved from the *General* tab to the **PBX** > **Extension Configuration** *Restriction* tab.

## Upgrading from MaxCS Release 8.0 and 8.5.x

You can upgrade MaxCS Release 8.0 and later directly to Release 8.5 Update 1

## *Upgrading from MaxCS Release 6.5.x or Release 7.5.x*

If your version of MaxCS is earlier than Release 6.5.x or Release 7.5.x, follow this process:

1. Upgrade to Release 8.5 (refer to the *MaxCS 8.5 Upgrade Guide*)
2. Upgrade from Release 8.5 to Release 8.5 Update 1.

## *Upgrading from MaxCS Versions Prior to Release 6.5*

If your version of MaxCS is earlier than release 6.5, follow this process:

1. Upgrade to Release 6.5.
2. Upgrade to Release 8.5 (refer to the *MaxCS 8.5 Upgrade Guide*)
3. Upgrade from Release 8.5 to Release 8.5 Update 1.

## Upgrade Procedures: MaxCS Premise and Private Cloud

To upgrade to Release 8.5 Update 1, follow this process. You will need to download the Release 8.5 Update 1 zipped files; get these from your Altigen representative or the Altigen Partner portal.

1. Review the *Exchange Integration* chapter in the *MaxCS 8.5 Update 1 Administration Manual,* along with the *New Features Guide*, before you begin. This will alert you to any changes that you may need to make to your configuration.
2. If there are any IP Dialing Table entries that have the Protocol set to *H.323,* update them to change the Protocol to *SIP*.
3. If a hardware chassis is being used, make sure that the System Key is attached on the parallel port or a USB port.   CAUTION! Do not connect the system key to any Altigen board, because damage may occur to the board or to the system key.
4. Log in to Windows as a domain or local user account that has local administrator privileges. If your machine is a stand-alone server, you must log in as a local administrator account. If you plan to run Exchange Integration, you must have domain administrator rights.
5. **Important!  Run the *Backup & Restore* tool** to back up the existing configuration, voice mail messages, and greetings.
6. Perform the product registration process from the MaxAdministrator *License Information* page (either online or offline registration) and obtain the EXCTL.DAT license activation file from the Altigen Product Registration portal.
   Note that no product registration is required when upgrading directly from 8.5 to 8.5 Update 1.
7. For Softswitch deployments, install and run the MaxCS HMCP Certification tool.  The instructions for running this tool are found in the *MaxCS Softswitch 8.5 Update 1 Deployment Guide*.
8. Run the **AltiGen Start & Stop Services** utility to stop all Altigen services.
9. Unzip the downloaded MaxCS 8.5 Update 1 installation files into a temporary folder on the MaxCS server. In the folder where you extracted the zipped files, run SETUP.EXE in the MAXCS ACM folder.

10. During the installation wizard, when you are prompted whether to register:

- For <u>Premise</u> upgrades, choose **Register Now** to load the EXCTL.DAT file.
- For <u>MaxCS Private Cloud</u> upgrades, choose **Register Later**. The MaxCS server will check with the Altigen licensing server when switching starts, and will automatically retrieve the appropriate licensing.

11. Reboot the system after the installation process has finished.

12. **You <u>must</u> download an Altigen certificate again.** In MaxAdministrator, choose **System** > **Request Certificate**.

13. Reboot the system.

14. If want your Polycom VVX phones to immediately update to the new firmware version in this release, follow these steps:

   a. Open MaxAdministrator and select **System** > **Polycom Configuration**.

   b. Check the *Enable Polycom VVX firmware automatic upgrade* option. This is a new option in Release 8.5 Update 1.

   c. Check each VVX phone's extension settings, to set each phone's enable/disable auto-update setting. This is found in **PBX** > **Altigen IP Phone Configuration** on the *Polycom* tab.

   d. If you find that your VVX phones are not updating or registering automatically, you may need to boot the system again to make sure that the phones all apply the new certificate and firmware.

15. Check your SIP Trunk configuration and make any necessary adjustments.

16. Upgrade <u>all</u> the MaxCS client application on a user's desktop before the agent uses any of those applications.

17. If you plan to enforce TLS version 1.2 whenever TLS is used, upgrade your IP-705, IP-710, and IP-720 phone firmware to the latest supported version (2xB3). Refer to the *MaxCS 8.5 Update 1 New Features Guide* for details on TLS 1.2.

18. Review the information on the new features and adjust your configuration as needed:

- System E911 CID
- Polycom VVX firmware auto-update option
- Voicemail retention options (for extensions, workgroups, and huntgroups)

19. For Private Cloud deployments, make sure that you update all components (including External Logger, VRM, and for call centers, AltiReport), even if you are not using those components.

**Note:** For customers running Windows Defender: If your MaxCS server is running Windows Defender, we recommend that you add the following to Windows Defender's exclusion folder: "AltiDB", "AltiServ" and "Postoffice" (for performance reasons). If you are using VRM Pro or a voice recording feature, you may also want to add the recording folder to Windows Defender's exclusion folder.

## Migration Process: Premise Deployments to MaxCS Private Cloud

For instructions on migrating a MaxCS on-premise deployment (on a hardware chassis) to MaxCS Private Cloud, follow the steps in Article 1172, which is available from the AltiGen Knowledgebase. Click here to log in and open that document.

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

## Upgrade Process: Chassis Systems on Unsupported Windows O/S

When upgrading from a chassis with an unsupported operating system such as Windows XP or Windows 2000 server, you can still upgrade to Release 8.5 Update 1.

- You must install Release 8.5 Update 1 on a system that is running a supported operating system.

- You must have a supported chassis version:
  - Max1000 – Rev A6 or above
  - Max2000 – Rev A8 or above
  - Office 3G – Rev R4 or above (Note that Office 3G uses Windows 2008 Server, which does not support TLS 1.2. Therefore, no version of AltiGen MaxCS Server Software supports TLS 1.2 on Windows 2008 Server.

Follow these procedures to convert a hardware chassis with an unsupported operating system:

1. Back up the configuration of the existing release, using the Backup & Restore tool.

   **Note:** If the LDAP service is disabled on the existing release, in addition to performing a Backup, manually copy the `C:\AltiServ\db\Storage` folder to a temporary location. During the Backup and Restore process, make sure that all 4 options are selected.

2. From MaxAdministrator *License* menu, select **License Information**. Click **Registration** and then click **Save Register Form** to export the registration information into the `register.htm` file.

3. Perform an offline product registration and choose the **Upgrade to 8.5** option, and then obtain a new EXCTL.dat file.

4. Install the new operating system on the server, and then install the MaxCS Release 8.5 Update 1 software.

5. After you complete the MaxCS 8.5 Update 1 installation, run the Backup & Restore tool again to restore the backup configuration. If LDAP service was disabled on the previous release, disable LDAP service from Windows Services and copy the backup `AltiServ\db\Storage\` to the `C:\AltiServ\db\Storage\` folder.

6. Copy the new EXCTL.DAT file to the `C:\AltiServ\db\` folder.

7. Reboot the system.

## Troubleshooting

- If during the upgrade process you see a warning message, "'Remove previous version and update first and then reboot machine to continue the installation' you will need to remove the earlier version manually. This issue has been noted when upgrading from MaxCS ACC Release 6.5 to MaxCS Release 8.0.

- If you cannot find the earlier Release in the Control Panel "Uninistall or Change Programs" page, follow these steps to remove the software (always follow Microsoft guidelines when editing the registry):

    1. Open the registry editor.

    2. Remove the folder AltiGenInstallTemp.

    3. Set this entry:

        \HKEY_LOCAL_MACHINE\SOFTWARE\AltiGenInstallTemp

    4. Save the changes.

    5. Reboot the system. The MaxCS 8.5 ACM installation should run automatically.

- If you are using SNMP setting, back up the file snmpcfg.dat under altiserv\db folder. After you complete the upgrade process, if the SNMP configuration is lost:

    1. Shut down the MaxCS services using "Start & Stop All AltiGen Services."

    2. Then restore the snmpcfg.data file and restart the AltiGen services.

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