

MAX Communication Server Release 8.5 Update 1

VRM Pro Upgrade Guide

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About This Guide

This guide is provided for customers who have been running VRManager in earlier releases of MaxCS.

As of MaxCS Release 8.5 Update 1, Altigen's VRManager application is no longer supported. You will need to upgrade to the new version, VRM Pro. No new licenses are required for customers upgrading from VR Manager.

This guide provides instructions for upgrading VRManager to VRM Pro.

About VRM Pro

VRM Pro offers security features that were not available in VRManager:

- You can store voice recordings in encrypted format
- You can now grant specific file record privileges to individual users (play, trim, and export)
- You can save VRM application data in an external database
- You can set password requirements ensure that users create more complex passwords
- You can implement policies such as password expiration periods, session timeout durations, and maximum number of login attempts allowed
- Users can trim voice recordings and export the trimmed recordings
- The audio player display has been enhanced
- The application is integrated with the CDR database

Refer to the VRM Pro Manual for instructions on using VRM Pro.

Prerequisites

Note the following requirements before you begin the upgrade procedures.

You must have an external application database that will be used by VRM Pro. VRM Pro and Altigen's *Quality Management* application use the same database.

If you have privacy concerns, you can store the VRM Pro and *Quality Management* data in a database separate from the CDR database. Otherwise, it is best to store all the application data in the CDR database, since it is easier to manage a single database.

• You must have a SQL DB instance to use for VRM Pro.

This SQL DB can be the CDR database or an application database that may be shared with VRM Pro, the Quality Management application, or other Altigen add-on applications.

You can follow the procedures in the section <u>Installing and Configuring SQL 2014 Express SP2</u> beginning on page 7 if you do not have an existing SQL server. The instructions in this guide are based on SQL Express.



DO NOT USE the existing SQL VRM database that is currently used by VRM as the VRM Pro upgrade target DB. A separate SQL DB is required.

• You must have the old VR Manager application installed and functioning.



Upgrade Instructions

- 1. Run *Setup.exe* in the MaxCS 8.5 Update 1 installation media, in the Add-on Application/VRM Pro folder.
- 2. The installation wizard will detect that VR Manager is installed. It will prompt you to confirm that you want to uninstall VR Manager. Click **Yes**.

Your configuration files and recording files will not be removed during this process.

	Question	
?	An earlier version of VRManager has been detected. That version is no longer supported. It must be uninstalled in order to install VRManager Pro. Your recording files and your configuration will be retained; however, you will not be able to roll back to the earlier version of the VRManager application. We recommend that you back up your data before you continue. Do you want to proceed?	

- 3. After uninstalling VRManager from the system, the wizard will start to install VRM Pro.
- 4. When you reach the Database panel, you will need to enter your database connection information. (Note that the screen shot below shows *example* configuration details.) DO NOT use the SQL VRM database that you used for VRManager.

VRM Pro and Altigen's *Quality Management* application use the same database. It is easiest to store all of the application data in the CDR database. However, if you have any privacy concerns, you can store the VRM Pro and *Quality Management* application data in a database that is separate from the CDR database.

閿	VRManager Pro	- AltiGen Instal	lation Wizard	×
Enter	r application data database d	letails.	1	ALTIGEN
VRM Pr you ca databa easier	ro and Altigen's QM application us in store the VRM Pro and Quality I ase. Otherwise, it is best to store to manage a single database.	e the same database. Management data in a all the application data	If you have privac database separate a in the CDR databa	y concerns, from the CDR se, since it is
	SQL Server Address:	127.0.0.1		
	SQL Instance:	ALTIVRM_NEW		
	SQL DB Name:	vrm_new		
	SQL DB Account:	Sð		
	SQL DB Password:	•••••	••	
InstallSh	ield			
		Back	Nevt	Canad



Note: <u>**Cloud customers**</u> can retrieve this database information from the Altigen Order Portal, on the *General* tab, in the *Call Center* section. Populate the fields in the installation wizard as follows:

For this field in the VRM Pro Installation Wiz- ard	enter this information from this General tab of the Altigen Cloud Portal
SQL Server Address	SQL Server Name
SQL Instance	Leave this field blank
SQL DB Name	CDR Database Name
SQL DB Account	SQL Username
SQL DB Password	SQL Password

5. Next, the wizard will ask you whether to migrate your data or not. Click **Yes** to migrate your previous configuration and recording files to VRM Pro.

You can watch the migration process in a Windows panel. When the migration process has completed, press any key to continue.

6. Once VRM Pro has been installed and all of your configuration and recording files have been migrated to the new format, log in to VRM Pro Admin and then into the VRM Pro client and confirm that the applications are working properly.

Note: Your VRM Pro Admin password will have ben reset to 22222. For security reasons, you should change this password right away.

7. Users from VRManager will have been migrated to VRM Pro. However, when a user logs into the VRM Pro client, the application will prompt the user to create a new username and password. This is necessary because in VRM Pro, usernames be in email address format. Inform your users of this change.

Post-Upgrade Instructions

After upgrading to VRM Pro, you will need to uninstall the old SQL 2008 VR Manager database on the VR Manager server. (Cloud deployments: perform these steps on the MaxCS server.)

Note: Do not uninstall the SQL 2014 VRM Pro database instance (altivrm_new). If you do, VRM Pro will not run.

These steps should not be performed until you have confirmed that your VRM Pro applications are all working properly. You can perform this procedure several days after you upgrade to VRM Pro.

- 1. Open the Windows Add/Remove Programs panel.
- 2. Select Microsoft SQL Server 2008 from the list (the old VRM database).

Name 🔺	- Publisher
Microsoft SQL Server 2008 🛛 👷	Microsoft Corporation
Microsoft SQL Server 2008 Browser	Microsoft Corporation
🖥 Microsoft SQL Server 2008 Native Client	Microsoft Corporation
📑 Microsoft SQL Server 2008 Setup Support Files	Microsoft Corporation
Microsoft SQL Server VSS Writer	Microsoft Corporation

3. Click **Remove**.





4. In the *Select Instance* panel, select **ALTIVRM** from the pull-down list.

🔜 Remove SQL Server 2008				_ 🗆 ×
Select Instance Specify the instance of SQL	Server to modify.			
Select Instance Select Features Removal Rules Ready to Remove Removal Progress	Select the insta "Remove share Instance to ren Installed instan	ance of Set Server to remove. To remove Management d features only, and then click next. nove features from: ALTIVRM ces:	Tools and shared features only	, select
Complete	Instance Name	Features	Version	Edition
	ALTIVRM	SQLEngine,SQLEngine\Replication	10.1.2531.0	Express

5. In the Select Features panel, click Select All to remove the SQL 2008 server.



Remove SQL Server 2008 Select Features The SQL Server features on	this computer are shown below. To remove a feature, select the checkbox next to the feature
Select Instance Select Features Removal Rules Ready to Remove Removal Progress Complete	Features: ALTIVRM SQL Server Replication Shared Features SQL Client Connectivity SDK Redistributable Features Select All Unselect All

6. Follow the instructions on next few panels to remove the ALTIVRM database instance.

Installing and Configuring SQL 2014 Express SP2

If you don't have an existing SQL server, you can download and install a SQL 2014 Express SP2. Note that only up to 10GB data storage is supported.

Before you begin, note that VRM Pro and Altigen's *Quality Management* application use the same database. It is easiest to store all of the application data in the CDR database. However, if you have any privacy concerns, you can store the VRM Pro and *Quality Management* application data in a database that is separate from the CDR database.

Installing SQL 2014 Express

1. Download SQL 2014 Express 2014 SP2 from:

https://www.microsoft.com/en-us/download/details.aspx?id=53167

The file you should download is SQLEXPRWT_x86_ENU.exe

- Prepare a Windows system (Windows 2008 or later). If you don't have a spare Windows system, it is possible to install on the Windows system where the VRM server resides. Make sure the server has enough memory and hard disk space.
- 3. Run SQLEXPRWT_x86_ENU.exe.





4. Select New SQL Server stand-alone installation or add features to an existing installation.



- 5. Accept the license terms and click Next.
- 6. Leave the option Use Microsoft Update to check for updates unchecked. Click Next.



7. Select all features and click **Next**.



Features:	Feature description:
Instance Features Database Engine Services SQL Server Replication Shared Features Client Tools Connectivity	The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on the same computer.
 Client Tools Backwards Compatibility Client Tools SDK 	Prerequisites for selected features:
 Management Tools - Basic Management Tools - Complete SQL Client Connectivity SDK Redistributable Features 	Already installed: Windows PowerShell 2.0 Microsoft .NET Framework 3.5 Microsoft Visual Studio 2010 Redistributables Microsoft .NET Framework 4.0
	Disk Space Requirements
	Drive C: 2359 MB required, 7660 MB available
Select All Unselect All	

8. In the *Named Instance* field, enter the name *altivrm_new* and click **Next**. The wizard will automatically make the *Named instance* and *Instance ID* the same, by default.

Named instance:	altivrm_new			
nstance ID:	ALTIVRM_NEW			
5QL Server directory: (nstalled instances:	C:\Program Files (x8	36)\Microsoft SQL Serve	r\M55QL12.ALTIVRM_I	NEW

9. Click **Next** on the Server Configuration tab.



10. On the *Server Configuration* tab, select **Mixed Mode** and enter a password for the SQL system administrator (sa) account. Make a note of this password for future reference.

Authentication Mode		
	, vication mode	
C Windows addren	. Caulon mode	
 Mixed Mode (SQI 	. Server auchentication and windows (auchenication)
Specify the passwor	d for the SQL Server system administr	ator (sa) account.
Enter password:		
Confirm password:	•••••	
Specify SOL Server	administrators	
	n (Build Man)	
SVMPHONV/buildma	n (balla hiany	SQL Server administrators n
SYMPHONY\buildma		Unrestricted access to the
SYMPHONY\buildma		unrestricted access to the Database Engine.
SYMPHONY\buildma		unrestricted access to the Database Engine.
SYMPHONY\buildma		unrestricted access to the Database Engine.

- 11. (Optional) Click **Add** if you want to create additional system administrator accounts. These accounts can be used to connect to, and manage, the SQL server.
- 12. Review the installation results. Click **Close** to finish the installation and then close the installation program.

Complete		
complete		
Your SQL Server 2014 install	ation completed successfully with product updates.	
License Terms	Information about the Setup operation or poss	ible next steps:
Global Rules		
Microsoft Update	Feature	Status
	2 Database Engine Services	Succeeded
Product Updates	SQL Server Replication	Succeeded
Install Setup Files	SQL Browser	Succeeded
Install Rules	SQL Writer	Succeeded
Easture Selection	SQL Client Connectivity	Succeeded
reacure seleccion	SQL Client Connectivity SDK	Succeeded
Feature Rules	Setup Support Files	Succeeded
Instance Configuration		
Constanting		

Continue to the next section.



Configuring SQL 2014 Express

1. From Windows, run SQL Server 2014 Configuration Manager.

Prog	rams(14) ————————————————————————————————————
3	SQL Server 2014 Management Studio
1	SQL Server 2014 Configuration Manager

2. In the left panel, select **Protocols for ALTIVRM_NEW**. Right-click **TCP/IP** and enable TCP/IP.

File Action View Help			
🗢 🔿 🖄 🗒 📑 🚺			
😫 SQL Server Configuration Manager (Local)	Protocol Name	Status	
SQL Server Services	🕉 Shared Memory	Enabled	
SQL Server Network Configuration (32bit)	🕉 Named Pipes	Disabled	
Protocols for ALTIVRM_NEW	TCP/IP	Enabled	La presenta de la
표 .킃, SQL Native Client 11.0 Configuration (32bit)	1		Enable
			Disable
			Properties
			Help

3. Restart SQL Server services for ALTIVRM_NEW.

Hie Action View Help		
🗢 🧼 💋 📓 🗟 🚺 🕑 🔍 📀		
😵 SQL Server Configuration Manager (Local)	Name	State
SQL Server Services	5QL Server Browser	Stopped
□ <u>↓</u> SQL Server Network Configuration (32bit)	SQL Server (ALTIVRM_NEW)	Running
Reprotocols for ALTIVRM_NEW	SQL Server Agent (ALTIVRM_NE	Start
⊞ , SQL Native Client 11.0 Configuration (32bit)		Stop
		Pause
		Resume
		Restart
		Properties
		Hein

4. Next, run SQL Server 2014 Management Studio.



COL	- Commen 2014 Configuration Manager
Te py	L Server 2014 Configuration Manager
E Doi	wnload Microsoft SQL Server Compact
E SQ	L Server 2014 Data Profile Viewer
🖐 SQ	L Server 2014 Database Engine Tuning Adviso
🚮 sq	L Server 2014 Deployment Wizard
💽 sq	L Server 2014 Error and Usage Reporting
🛄 sq	L Server 2014 Execute Package Utility
🔜 sq	L Server 2014 Import and Export Data (32-bit)
📸 SQ	L Server 2014 Installation Center
- 	L Server 2014 Management Studio
100	

5. On the login panel, if the server name is not correct, select **Browse for more** and select the SQL instance you just installed.

Server time: Database Engine Select the server to connect to:	
Server time: Database Engine Select the server to connect to:	
boldbase Englis	
Server name: 🔨 AW67U1-R VALTIVRM_NEW	1
User name: SYMPHONY\buildman Reporting Services	
Password:	
Remember password	

6. After you select the correct SQL instance, click **Connect**.



7. Create a new database. This database will be used by VRM Pro.



In the figure below, *vrm_new* is the database name. Click **OK** to create the database.

)atabase name:		vrm_new	K	
)wner:		<default></default>		
Use full-text i	ndexing			
Use full-text in) atabase files:	ndexing	Filegroup	Initial Size (MB)	Autorrowth / Maxsize
Use full-text i)atabase files: Logical Name vrm_new	ndexing	Filegroup	Initial Size (MB)	Autogrowth / Maxsize By 1 MB, Unlimited

- 8. The new, empty database is created. In our example, the database is created with the following parameters:
 - SQL Server Address: The Windows system's IP address
 - SQL Instance: ALTIVRM_NEW
 - SQL DB Name: vrm_new
 - SQL Account: sa
 - SQL DB password: the sa password created in the earlier step on page 10.



Operational Limitations

Refer to the Readme files on your installation media for any know limitations with this release.

Altigen Technical Support

Altigen provides technical support to Authorized Altigen Partners and distributors only. End user customers, please contact your Authorized Altigen Partner for technical support.

Authorized Altigen Partners and distributors may contact Altigen technical support by the following methods:

- You may request technical support on Altigen's Partner web site, at https://partner.altigen.com. Open a case on this site; a Technical Support representative will respond within one business day.
- Call 888-ALTIGEN, option 5, or 408-597-9000, option 5, 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 no one is available to answer your call.

Technical support hours are 5:00 a.m. to 5:00 p.m., PT, 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 information:

- Partner ID
- Altigen Certified Engineer ID
- Product serial number
- AltiWare or MaxCS version number
- Number and types of boards in the system
- Server model
- The telephone number where you can be reached