



MAX Communication Server
Release 8.6
Upgrade Guide

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This document provides guidelines for upgrading from an earlier version of MaxCS to release 8.6.

Enhancement Included in This Release

For a list of new features and enhancements that are included in this release, refer to the *New Features Guide*.

Requirements

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

This release 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.

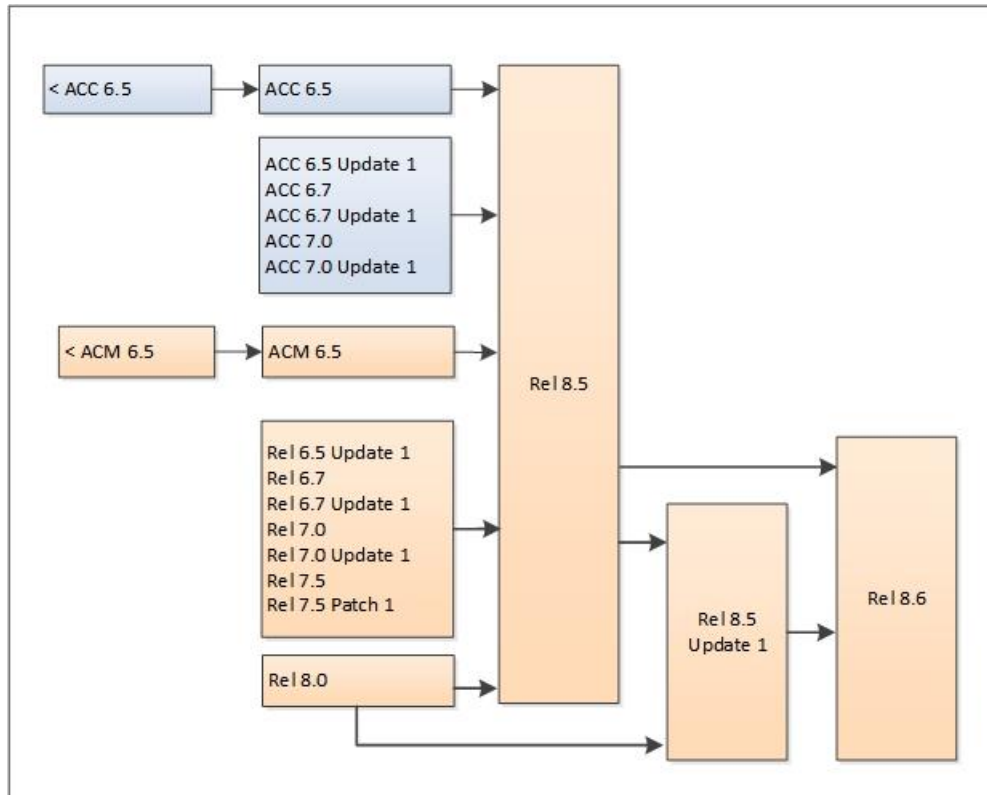
Port Information

- 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.
- This release 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.

Software Upgrade Path



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

Upgrading from MaxCS Release 8.5 and 8.5.1

You can upgrade MaxCS Release 8.5 and later directly to Release 8.6.

Upgrading from MaxCS Release 6.5.x, 6.7.x, 7.x, or 8.0

If your version of MaxCS is earlier than Release 8.5, 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 8.6.

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 8.6.

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 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 Premise upgrades, choose **Register Now** to load the EXCTL.DAT file.
 - For MaxCS Private Cloud 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 must 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 **all** 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 "Uninstall 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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AltiGen Communications, Inc.
679 River Oaks Parkway, San Jose, CA 95134
Telephone: 888-AltiGen (258-4436) | Fax: 408-597-9020

E-mail: info@altigen.com Web site: www.altigen.com

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