

## MaxACD Release 7.1

# Upgrade Guide for Enterprise Deployments

November 26, 2018

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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](mailto:info@altigen.com) Web site: [www.altigen.com](http://www.altigen.com)

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## About This Guide

This guide describes how to upgrade a MaxACD 7.0 or MaxACD 7.01 Enterprise deployment to MaxACD Release 7.1. This guide does not apply to hosted deployments.

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## Requirements

In order to perform the upgrade instructions in this guide, you must have either MaxACD 7.0 or a 7.0 Update 1 on-premise deployment.

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## Upgrading from Release 6.5.8

If your organization is upgrading from Release 6.5.8, we recommend that you move to Release 7.1 in the following manner:

1. Do a complete new 7.1 installation that is separate from your current MaxACD 6.5.8 deployment. Keep your 6.5.8 deployment as-is for now.
2. Re-enter all of your configuration into 7.1, including users, workgroups, business hours, routing rules, and so on.
3. Convert your current IVR phrases to .WMA format. You can use a tool named VoxConvertor to first convert Altigen's phrases to .WAV format. Then you can use WavePad (by NCH Software) to convert the .WAV files into .WMA format. The recommended .WMA bitrate WavePad setting is Windows Media Audio Voice 9, 16kbps, 16 kHz, mono.
4. After you have recreated your configuration and tested it, we recommend that you retain your 6.5.8 deployment for a period of time until you are confident that the 7.1 configuration is correct and is complete.

### Important!



If you are running both MaxACD 6.5.8 and MaxACD 7.1 in your environment while you upgrade, be careful with the Skype *SIP Refer Support* option. Release 6.5.8 trunk configuration needs *SIP Refer Support* to be enabled. However, Release 7.1 needs *SIP Refer Support* to be disabled. Be aware that if you disable the *SIP Refer Support* option for Release 6.5.8, then that service may stop working.

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## Upgrading from Release 7.0 or 7.0.1

The Service Hub introduced in 7.1 Release offers user management and add-on application integration for one or more MaxACD servers deployed in your company. Admin users and application users access add-on applications through logging into Service Hub.

The Service Hub will be deployed as part of the MaxACD upgrade process.

If you are upgrading a redundant system, refer to the section [Upgrading a Redundant System](#) for additional information before you begin the upgrade process.

**Note:** This process will take down BOTH servers in a redundant setup to perform an upgrade to 7.1.

### 1. Decide Where to Deploy the Service Hub Database and Website

You can add one or more MaxACD servers to a single Service Hub.

When the first MaxACD server is upgraded, the Service Hub database and website are created.

If you subsequently add or upgrade additional MaxACD servers, you should skip the Service Hub database installation section of the installation program. Any additional servers will automatically be added to the Service Hub.

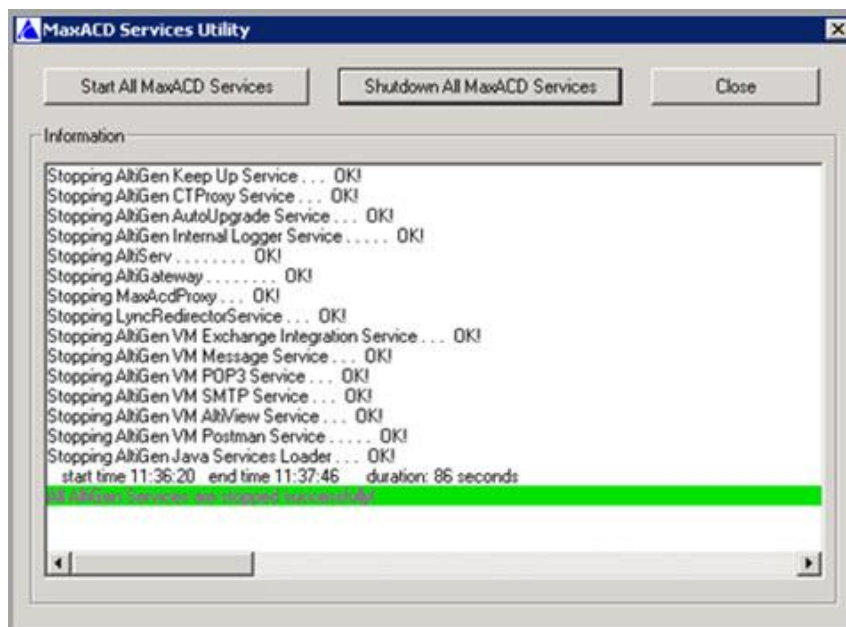
Altigen offers the following recommendations for locating the Service Hub:

- If you currently have a single MaxACD server deployed, you may choose to deploy the Service Hub website on the same server as MaxACD or on a different server.
- If you have multiple MaxACD Servers deployed, we recommend that you deploy the Service Hub website on a separate server from MaxACD. The section [Deploy Service Hub Website on a Separate Server](#) on page 7 explains the extra steps to deploy this configuration.

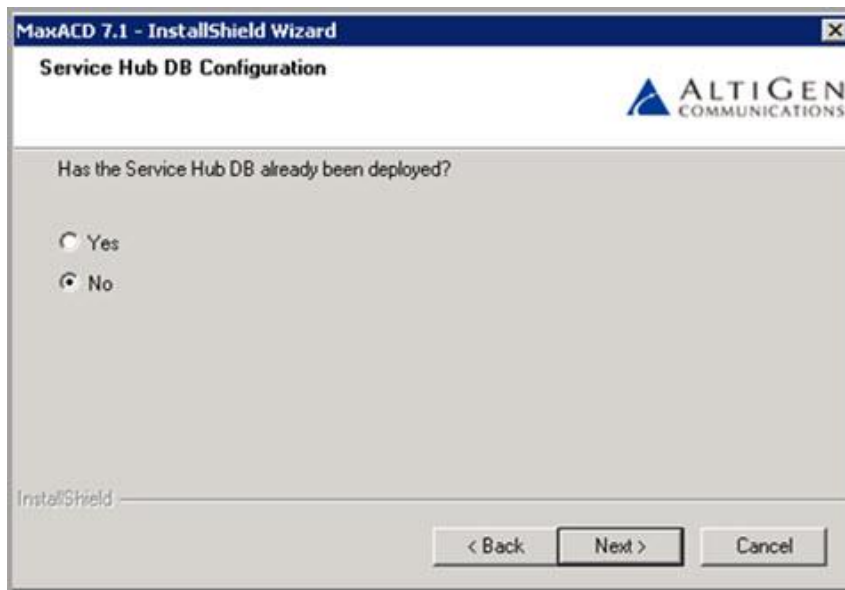
Remote access should be enabled for the Service Hub if you have remote admin or application users.

## 2. Run the Installation Program

- A. Use the MaxACD Service Utility to shut down all services in your MaxACD server. If you have a redundant system, services must be shut down for both the primary server and the secondary server.



- B. Run the MaxServer installation program from your installation media (setup.exe). The installation program will detect that you have an earlier version of MaxACD installed.
- C. Continue through the installation panels. When you are asked about the Service Hub database:
  - If you have already deployed the Service Hub database (for example, if you have already upgraded the primary MaxACD server and are now upgrading the secondary server, in a redundant deployment), select **Yes** and click **Next**. Refer to the section [Upgrading a Redundant System](#), and then skip ahead to step G on page 7.
  - If you have not yet deployed the Service hub database, select **No** and click **Next** to continue.



D. Enter the MaxAdmin and Service Hub database information.

Both MaxAdmin and the Service Hub database will be deployed on the same SQL server and will use the same Instance.

**Important!** If the accounts do not have sufficient privileges, then the upgrade process may fail.

The MaxAdmin SQL user account requires privileges for the following actions:

- SQL DB creation
- SQL account creation
- Table updating
- Table creation
- Schema modification

The Service Hub user account requires privileges for the following actions:

- Table updating
- Schema modification

Feature	Description
<b>SQL Server Address</b>	The IP Address of your SQL server (use the AlwaysOn Availability Group's listener IP address, or hostname that resolves to that address).
<b>SQL Instance</b>	The SQL Instance name.
<b>SWL Sysadmin Account</b>	The SQL Login account name; this is required for creating the database and table for MaxAdmin.
<b>SQL Sysadmin Password</b>	The password for the SQL Sysadmin account.
<b>Service Hub DB Name</b>	Enter a name for this database.

Feature	Description
<b>Service Hub DB Account</b>	Enter a SQL account that has privileges to create the data-base and schema and has read/write access to the database.
<b>Service Hub DB Password</b>	Enter the password for the Service Hub DB account.



**If you are upgrading the primary server in a redundant deployment,** make sure that you record the Service Hub DB Name, Service hub DB Account, and Service Hub DB Password fields. You will need this information while deploying the secondary server.



MaxACD 7.1 - InstallShield Wizard

**Service Hub DB Installation**

ALTIGEN COMMUNICATIONS

Enter Service Hub DB database login credential.

SQL Server Address: 10.30.1.110

SQL Instance: SQLEXPRESS

SQL Sysadmin account: sa

SQL Sysadmin password: ●●●●●●●●

Service Hub DB Name: SHDBHosted111

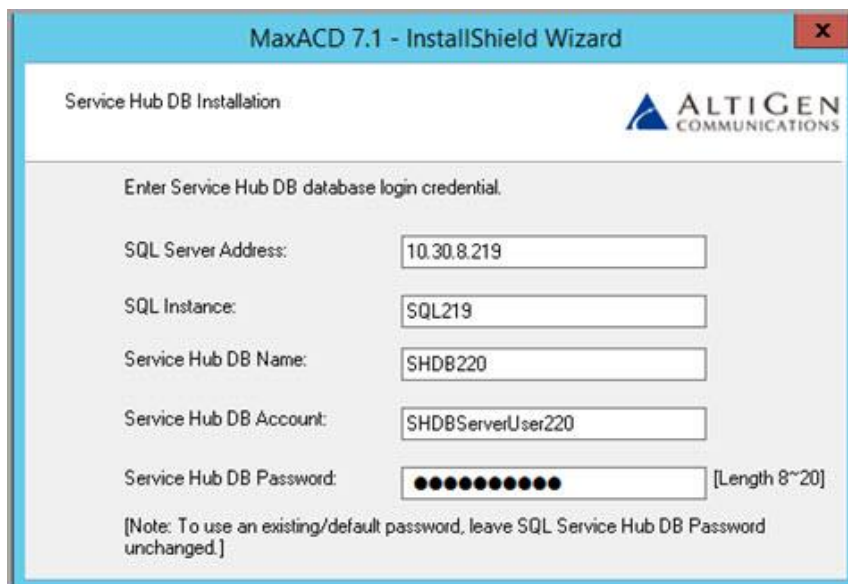
Service Hub DB Account: sa

Service Hub DB Password: ●●●●●●●●●● [Length 8~20]

[Note: To use an existing/default password, leave SQL Service Hub DB Password unchanged.]

InstallShield

- E. Skip ahead to step G.
- F. If the Service Hub database has already been deployed, enter the Service Hub database name, Account and Password for the existing database so that so that this MaxServer can be registered with the Service Hub. Refer to [Upgrading a Redundant System](#).



**MaxACD 7.1 - InstallShield Wizard**

Service Hub DB Installation

ALTIGEN COMMUNICATIONS

Enter Service Hub DB database login credential.

SQL Server Address: 10.30.8.219

SQL Instance: SQL219

Service Hub DB Name: SHDB220

Service Hub DB Account: SHDBServerUser220

Service Hub DB Password: [Length 8~20]

[Note: To use an existing/default password, leave SQL Service Hub DB Password unchanged.]

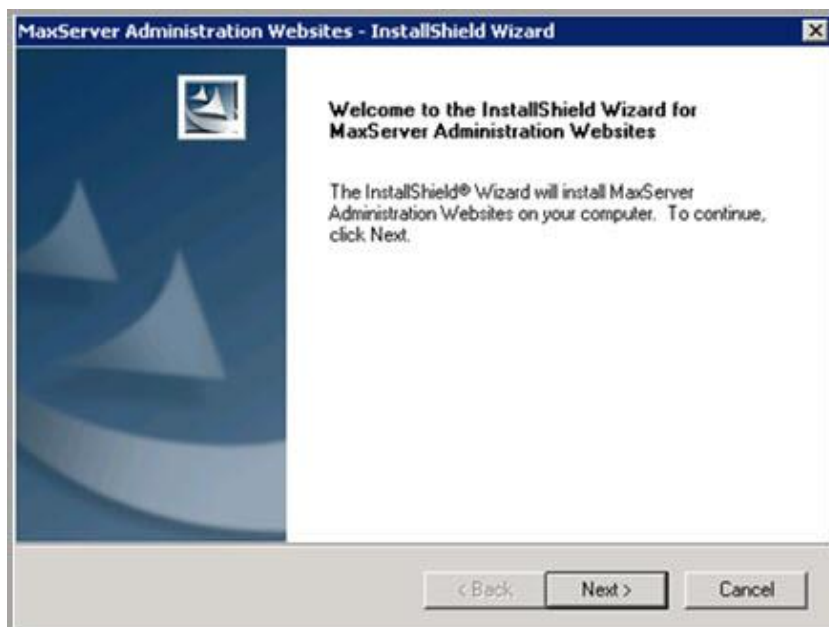
- G. Follow the prompts to complete the installation.
- H. Restart the computer.

### 3. Deploy Service Hub Website on a Separate Server (Optional)

Follow the instructions in this step *only if you choose to deploy the Service Hub website on a server separate from this MaxServer*. Otherwise, skip this section.

- A. Run the *MaxServer Administration Websites* installation program. This executable is stored in the *MaxServer Administration Websites* folder on your installation media.

This installation process does not deploy the Service Hub database.



**MaxServer Administration Websites - InstallShield Wizard**

Welcome to the InstallShield Wizard for MaxServer Administration Websites

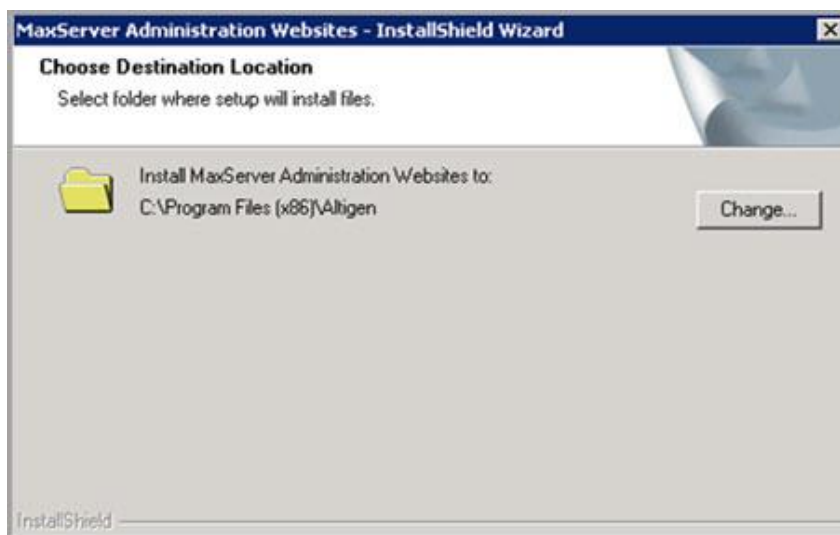
The InstallShield® Wizard will install MaxServer Administration Websites on your computer. To continue, click Next.

< Back Next > Cancel

- B. Enter a MaxACD system ID. This ID number will be used to identify this server and distinguish it from any other servers in your MaxACD deployment.
- You cannot change the System ID number later. The only way to change a System ID afterwards is to uninstall MaxACD and then reinstall it.
  - Each MaxACD server MUST have a unique ID number except two systems that are a pair in a redundant configuration.
  - If you are deploying a pair of systems in a redundant configuration, those two systems must have the same System ID.



- C. Specify the folder for installation.



- D. Enter the Service Hub credential information (this is the same information as the Service Hub database that you deployed earlier).





**MaxServer Administration Websites - InstallShield Wizard**

**Service Hub DB Configuration**

Enter Service Hub DB database login credential.

SQL Server Address: 10.30.8.219

SQL Instance: SQL219

Service Hub DB Account: SHDBServerUser220

Service Hub DB Password: [Length 8~20]

[Note: To use an existing/default password, leave SQL Service Hub DB Password unchanged.]

E. The database fields should be automatically filled in for you – leave those fields as they are.



**MaxServer Administration Websites - InstallShield Wizard**

**MaxServer Admin DB Configuration**

Enter MaxServer Admin DB database login credential.

SQL Server Address: 127.0.0.1

SQL Instance: SQLCWSDB1

SQL MaxServer Admin DB Account: CWSDBServerUser1

SQL MaxServer Admin DB Password: [Length 8~20]

[Note: To use an existing/default password, leave SQL MaxServer Admin DB Password unchanged.]

InstallShield

F. This portion of the installation is complete; click **Finish** to close the wizard.

## 4. Register System Key and Load the License File

Next, you will upload a 7.1 license activation file (EXCTL file) into MaxACD 7.1.

**Note:** If you are upgrading a redundant system, you need to perform this step only on the primary server.

- If you have login permissions on the Altigen Partner portal, begin with step a.
- If you do not have login permissions on the Altigen Partner portal, contact your VAR or Altigen to obtain a license file, then begin with step E.

- A. Log into your partner account in the Altigen Partner portal (<https://mspartner.altigen.com>). On the **Support** menu, click **MaxACD**.

You can click **List View** to view any existing MaxACD systems in your account.

System List								
( Total 3 )								
<a href="#">Add New System</a>								
End User	System Key	Address	City	State	Zip Code	Start Date	Configure	
Singapore Office	XXXXXXXXXXXXXXX	123 A St	San Jose	CA	94567	02/02/10	<a href="#">Activate Lic</a>	<a href="#">License File</a>
Shanghai Office	XXXXXXXXXXXXXXX	456 B St	Fremont	CA	94536	02/02/10	<a href="#">Activate Lic</a>	<a href="#">License File</a>
VOIP Lab Office	XXXXXXXXXXXXXXX	fgh	fgh	AL	2424	02/22/10	<a href="#">Activate Lic</a>	<a href="#">License File</a>

- B. Click **Add New System**. Enter all of the details of this new system and click **Submit**.

Add New System - Internet Explorer

<http://mspartner.altigen.com/LyncPartner/support/ACDSystemAdd.aspx?ACDID=10011&SourceFrom=>

### Add New System

**System Information**

System Key\*:

Hosting Name :

Redundancy Hosting Name :

**End User Information**

End User\*:

Address\*:

City\*:

State/Province\*:

Zip/Postal Code\*:

Country\*:

Phone\*:

- C. Click **Activate License**. Enter the appropriate quantities to activate and then click **Generate License File**.
- D. After the license file has been generated, click **Download License File**. Choose whether to email the EXCTL.DAT file or save it. You will need this file in the next step.

**Software License Activation**

End User:

System Key:

Current Registration Version: MAXACD for Lync 7.0  
Target Registration Version: MAXACD for Lync 7.0

License	Activated	Available	Additional Qty
MaxACD Redundancy (6RD00)	1	984	<input checked="" type="checkbox"/>
MaxACD for Lync Server License (9Lnn0)	1	3271	<input type="checkbox"/>
MaxAgent for Lync License (9Ann0)	36	1319	<input type="text"/>
MaxSupervisor for Lync License (9Bnn0)	501	1964	<input type="text"/>
MaxACD CRM Integration (Rnnn0)	202	176	<input type="text"/>
MAXACD MaxAgent Seat Combo - Voice and Chat (9Knn0)	5	35	<input type="text"/>
Recording Seat (R9nn0)	501	1289	<input type="text"/>

Generate License File

The license activation file was generated successfully. [Download License File](#)

Email License File to:

E. On the MaxACD server, open the \Altiserv\exe folder and run the executable *RegLicense.exe*.

**License Configuration**

System Key:

☒ Use Soft System Key

Registration Key	Description	Expiration Date
	REDUNDANCY	
	SIP TRUNK (255)	
	SIP TRUNK (45)	
	SDK CONNECTION SESSION (1)	
	CALL ROUTER ADVANCED	
	MAXREPORTS	
	VRMANAGER	
	MULTI-LINGUAL	
	RMCP MEDIA SERVER(1)	
	MAXACD FOR LYNC	
	MAXAGENT SEAT (60)	
	EXCHANGE INTEGRATION (60)	

F. Check the box **Use Soft System Key** in the upper right corner.

G. Click **Enter the System Key**.

H. Type the system key into the *System Key* field.

I. Click **Load**, navigate to the EXCTL.DAT file you downloaded, and then click **Open**.

The licenses should now appear in the window. The licenses are now loaded. You can see these licenses in MaxAdmin, on the *License* tab.

**Note:** If you accidentally load a license file with insufficient licenses for those already assigned to users, you will need to restart the MaxACD services to recover the license assignments.

## 5. Verify the Upgraded Configuration Data

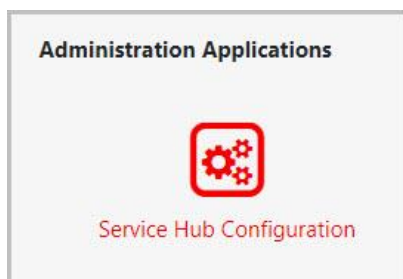
**Note:** If you are upgrading a redundant system, you need to perform this step only on the primary server.

- A. Log into the Service Hub with the same admin name and password you used for the earlier release. Use this URL:

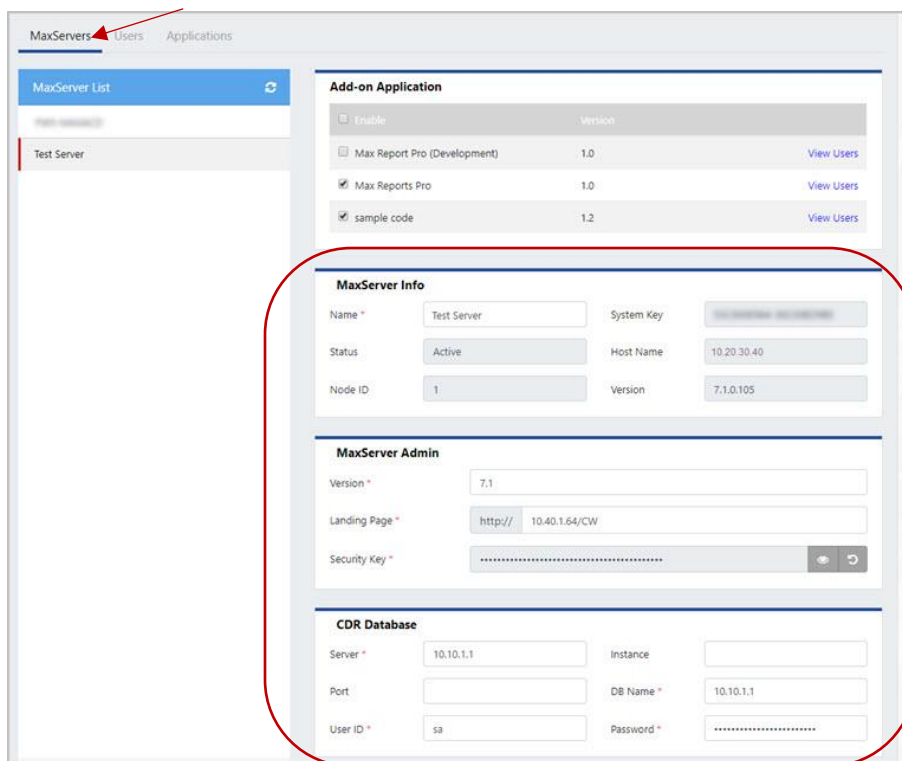
[http://\[localhost\]/ServiceHub](http://[localhost]/ServiceHub)

For example, <http://10.20.3.40/ServiceHub/>

- B. Within the Service Hub, click the *Service Hub Configuration* icon in the right panel.



- C. In the Configuration panels, click the *MaxServers* tab and verify that the details in the *MaxServer Info* section, the *MaxServer Admin* section, and the *CDR Database* section are all correct.



The screenshot shows the "Service Hub Configuration" page. The "MaxServers" tab is selected, indicated by a red arrow. The page is divided into several sections. The "MaxServer List" on the left shows a table with one entry: "Test Server". The "Add-on Application" section on the right has a table with the following data:

Enable	Version	
<input type="checkbox"/>	1.0	View Users
<input checked="" type="checkbox"/>	1.0	View Users
<input checked="" type="checkbox"/>	1.2	View Users

The "MaxServer Info" section is highlighted with a red circle and contains the following fields:

Name *	Test Server	System Key	[Redacted]
Status	Active	Host Name	10.20.30.40
Node ID	1	Version	7.1.0.105

The "MaxServer Admin" section contains the following fields:

Version *	7.1
Landing Page *	http:// 10.40.1.64/CW
Security Key *	[Redacted]

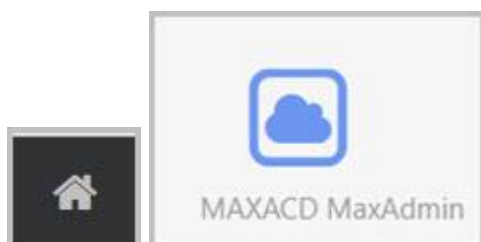
The "CDR Database" section contains the following fields:

Server *	10.10.1.1	Instance	
Port		DB Name *	10.10.1.1
User ID *	sa	Password *	[Redacted]

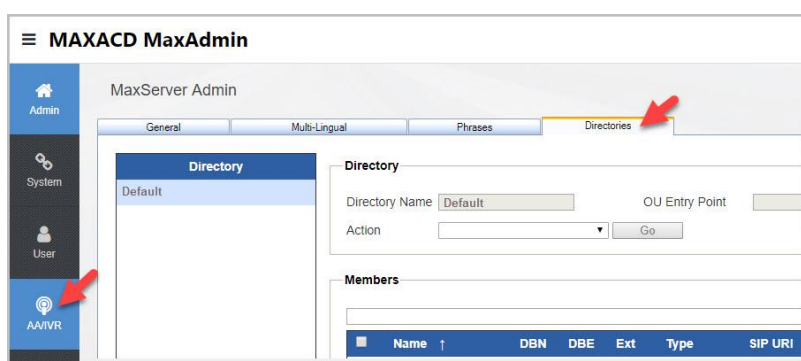
- D. Click the *Users* tab and verify that all company administrators who were configured in the earlier MaxACD release appear in the list.

Note that in order to retrieve users from AD, the Domain Admin account must have Local Admin privileges and Active Directory Search privileges in IIS.

- E. Click the **Home** icon at the top of the page; this returns you to the Service Hub Home page. On that page, click the MaxAdmin icon for your server.



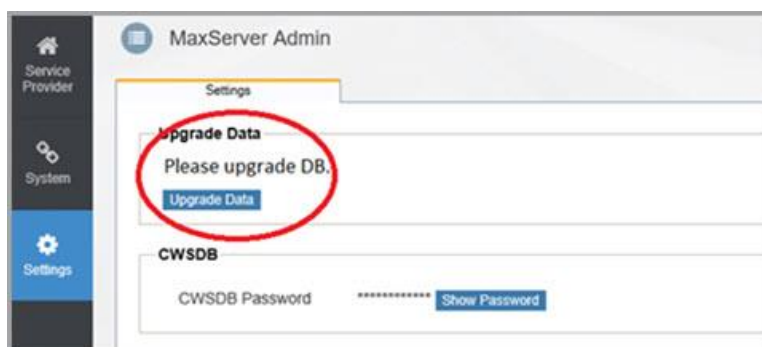
- F. In MaxAdmin, on the left Sidebar, select **AA/IVR**. Then switch to the *Directories* tab. Verify that a *Default* directory was created with the equivalent Dial-by-Name settings configured in the earlier release of MaxACD.



## 6. Upgrade the Database

**Note:** If you are upgrading a redundant system, you need to perform this step only on the primary server.

- A. On the Sidebar, select **Settings**.
- B. Click the **Upgrade Data** button.



## 7. Upgrade Exchange Integration

**Note:** If you are upgrading a redundant system, you need to perform this step only on the primary server.

If you upgraded from 7.0 and use the *Exchange Integration* feature, you must check these settings in MaxAdmin.

- A. On the Sidebar, select **System**.
- B. On the *Server* tab, enter or update the fields in the *Exchange Integration* section.

## 8. Upgrade Add-on applications

All add-on applications should be upgraded to release 7.1, including the External Logger application. External Logger must be upgraded to 7.1 in order to obtain correct CDR data.

To upgrade to External Logger version 7.1, run the setup program in the *External Logger Service* folder on your installation media.

## Upgrading a Redundant System

When upgrading a redundant MaxACD system, upgrade the primary server first, then upgrade the secondary server afterwards.


While you are upgrading the first (Primary) server, respond **No** when you reach step C on page 4. This is the step which asks if you have deployed the Service hub database yet. Then make sure you write down the Service Hub database information that you enter.

When you are upgrading the secondary server, respond **Yes** when you when you reach step C on page 4. You need to respond Yes because you already installed the Service Hub when you upgraded the primary server. The secondary server will automatically be associated with the Service Hub database. You will need to enter the same Service Hub database account and password that you assigned to the primary server.

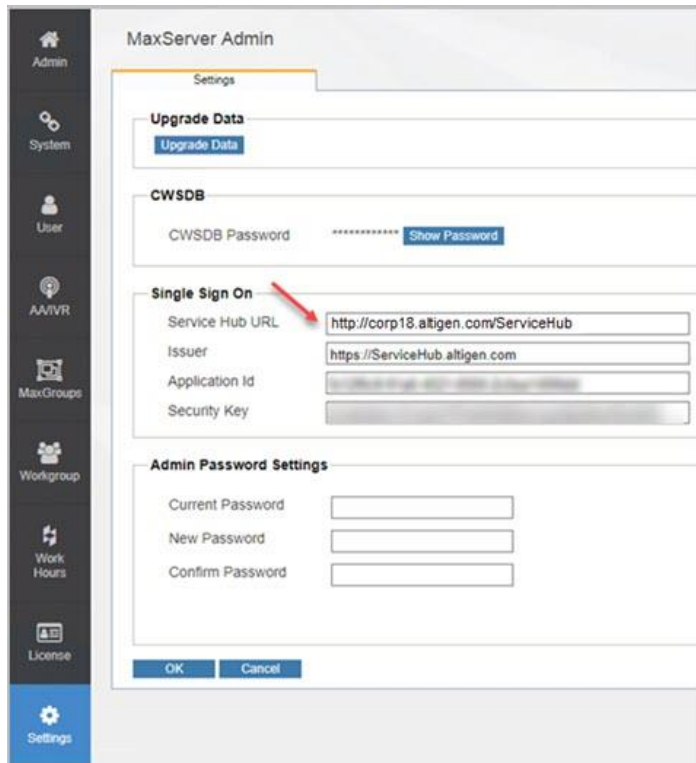
After both the Primary and Secondary servers have been upgraded, you will need to confirm that the upgrade process was successful and that the correct server is in control. To check this, log into MaxAdmin for this service and select **System > Redundancy**. Review the *New Features Guide* to learn how to open the Service Hub and then open MaxAdmin for that server.

Perform these additional steps after you upgrade a redundant system:

1. Log into the Service Hub. (Review the MaxACD 7.1 *New Features Guide* to learn how to open the Service Hub.) On the *MaxServers* tab, in the *MaxServer Admin* section, check the entry for the *Landing Page* field. If this entry is an IP address, then you must change it to a Fully Qualified Domain Name (FQDN.)



2. Log into MaxAdmin. On the *Settings* tab, in the *Single Sign On* section, check the entry for the *Service Hub URL* field. If this entry is an IP address, then you must change it to a Fully Qualified Domain Name (FQDN.)



MaxServer Admin

Settings

**Upgrade Data**

[Upgrade Data](#)

**CWSDB**

CWSDB Password \*\*\*\*\* [Show Password](#)

**Single Sign On**

Service Hub URL [http://corp18.altigen.com/ServiceHub](#)

Issuer [https://ServiceHub.altigen.com](#)

Application Id

Security Key

**Admin Password Settings**

Current Password

New Password

Confirm Password

[OK](#) [Cancel](#)