



MAX Communication Server Release 8.5 Update 1

VRM Pro Upgrade Guide

December 20, 2018

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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 [Installing and Configuring SQL 2014 Express SP2](#) beginning on page 7 if you do not have an existing SQL server. The instructions in this guide are based on SQL Express.



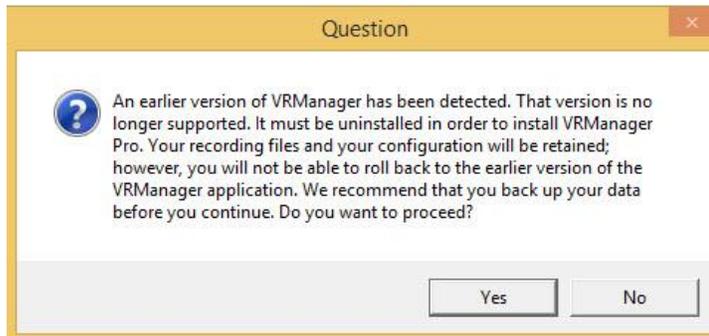
DO NOT USE the existing SQL VRM database that is currently used by VRM as the VRM Pro upgrade target DB. A separate SQL DB is required.

- 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.



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.



Note: **Cloud customers** 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 Wizard...	...enter this information from this General tab of the Altigen Cloud Portal
SQL Server Address	SQL Server Name
SQL Instance	<i>Leave this field blank</i>
SQL DB Name	CDR Database Name
SQL DB Account	SQL Username
SQL DB Password	SQL Password

- 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.

- 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.

- 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.

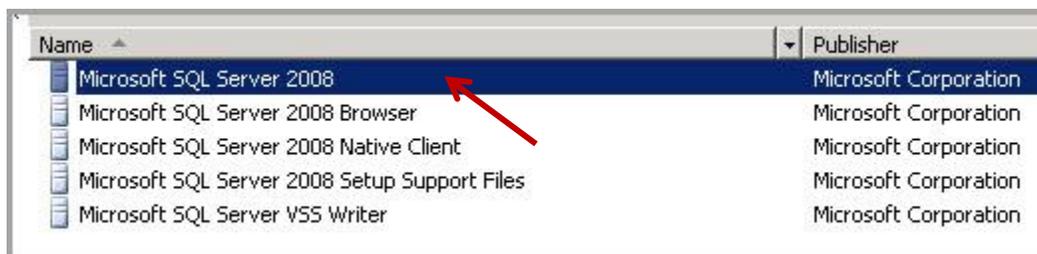
Post-Upgrade Instructions

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.

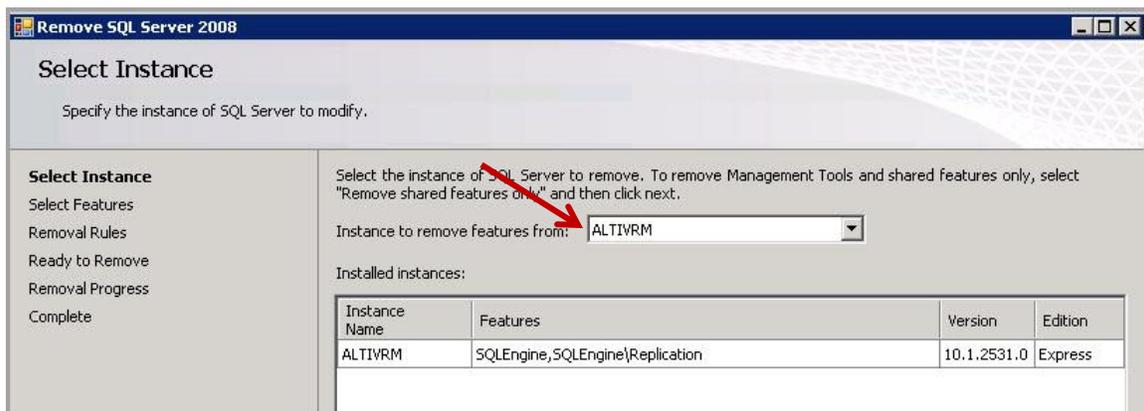
- Open the Windows Add/Remove Programs panel.
- Select Microsoft SQL Server 2008 from the list (the old VRM database).



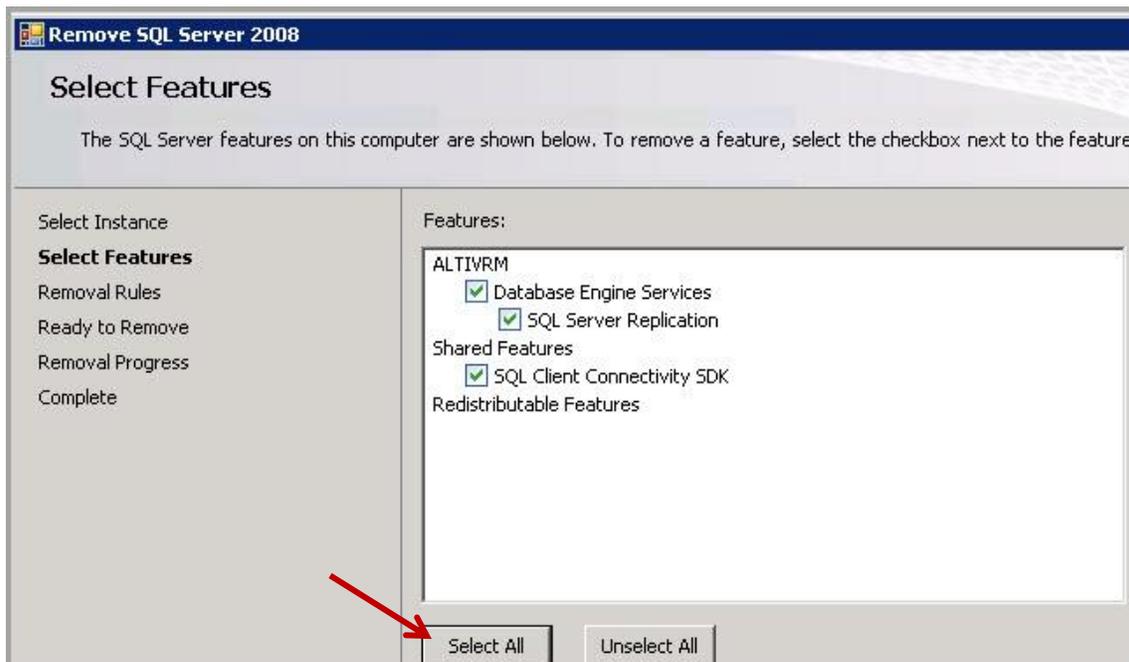
- Click **Remove**.



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



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



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

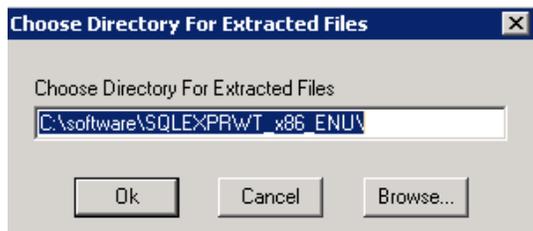
Installing and Configuring SQL 2014 Express SP2

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

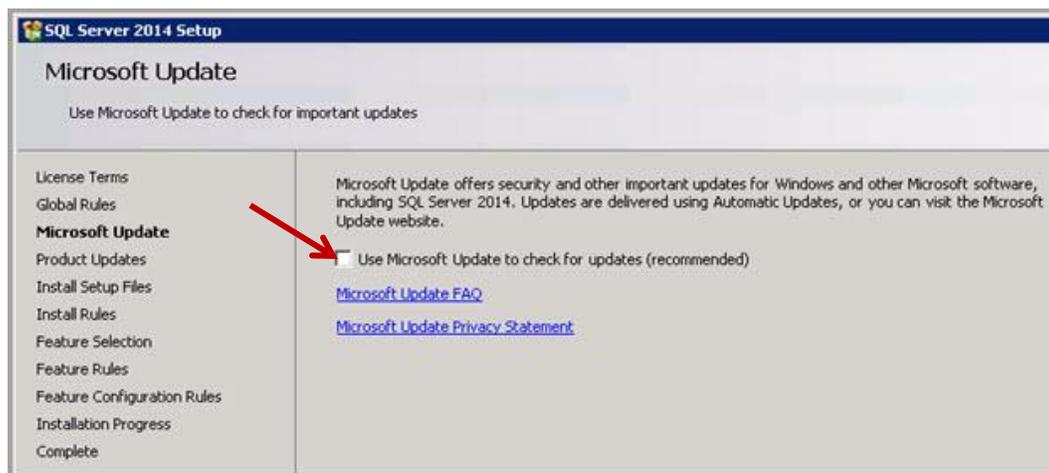
1. Download SQL 2014 Express 2014 SP2 from:
<https://www.microsoft.com/en-us/download/details.aspx?id=53167>
 The file you should download is *SQLEXPRT_x86_ENU.exe*
2. Prepare a Windows system (Windows 2008 or later). If you don't have a spare Windows system, it is possible to install on the Windows system where the VRM server resides. Make sure the server has enough memory and hard disk space.
3. Run *SQLEXPRT_x86_ENU.exe*.



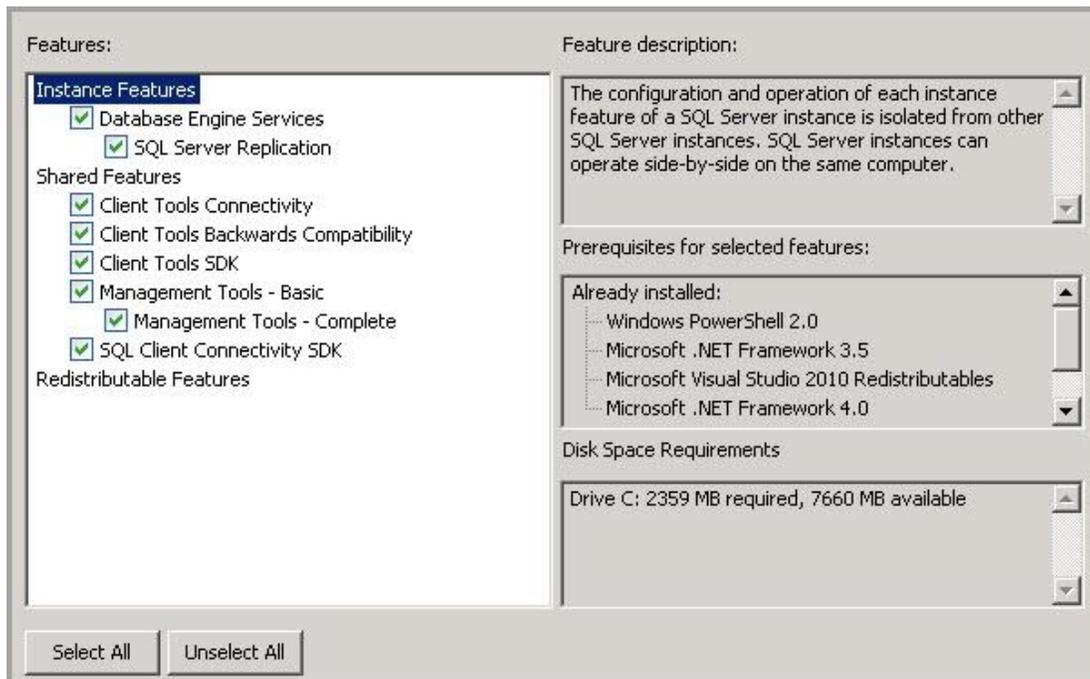
4. Select **New SQL Server stand-alone installation or add features to an existing installation.**



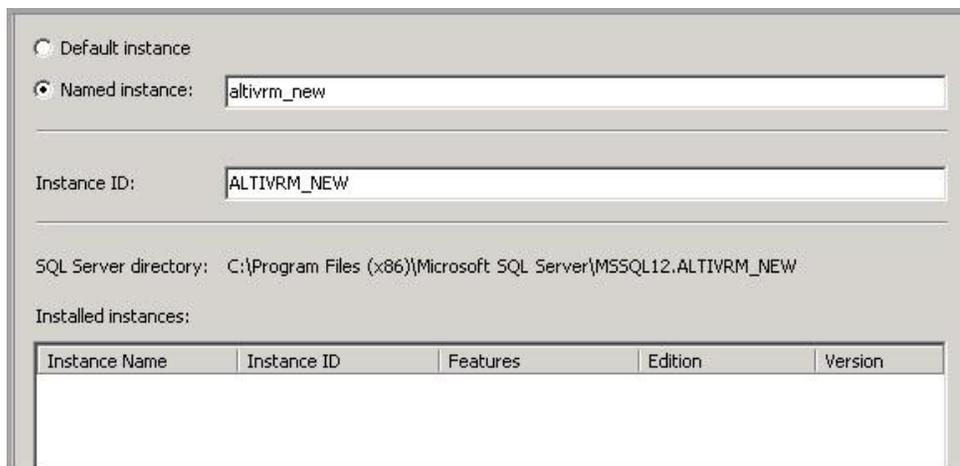
5. Accept the license terms and click **Next.**
6. Leave the option **Use Microsoft Update to check for updates** unchecked. Click **Next.**



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

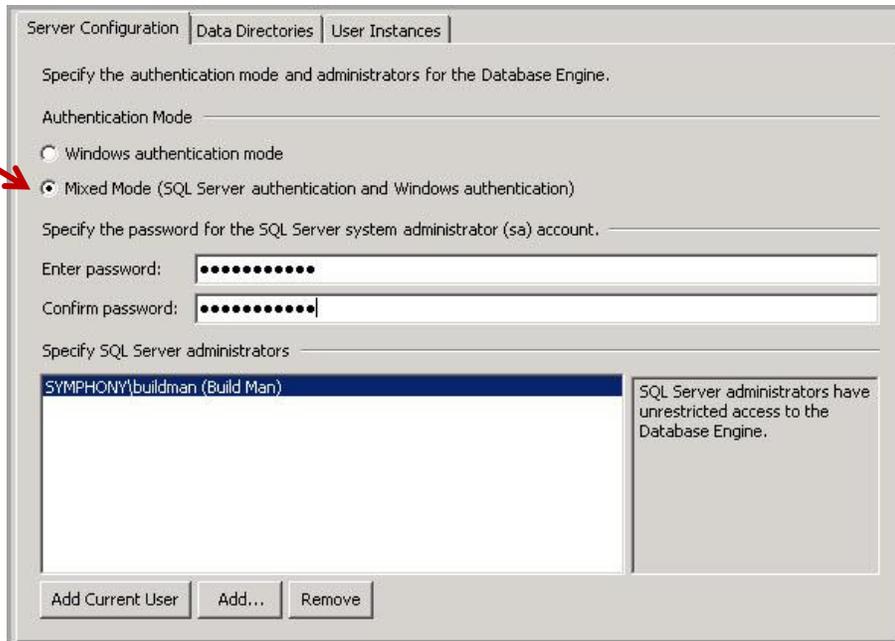


8. In the *Named Instance* field, enter the name `altivrm_new` and click **Next**. The wizard will automatically make the *Named instance* and *Instance ID* the same, by default.

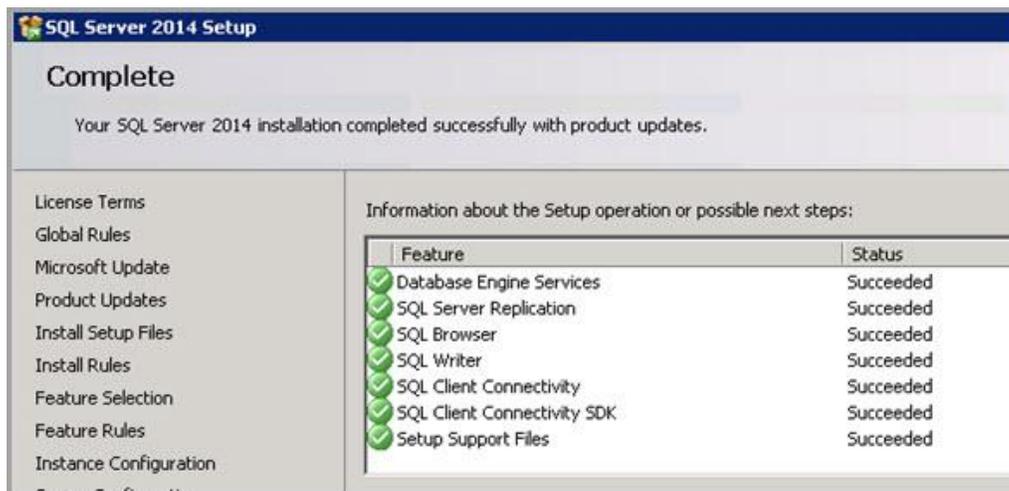


9. Click **Next** on the Server Configuration tab.

- 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.



- (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.
- Review the installation results. Click **Close** to finish the installation and then close the installation program.



Feature	Status
Database Engine Services	Succeeded
SQL Server Replication	Succeeded
SQL Browser	Succeeded
SQL Writer	Succeeded
SQL Client Connectivity	Succeeded
SQL Client Connectivity SDK	Succeeded
Setup Support Files	Succeeded

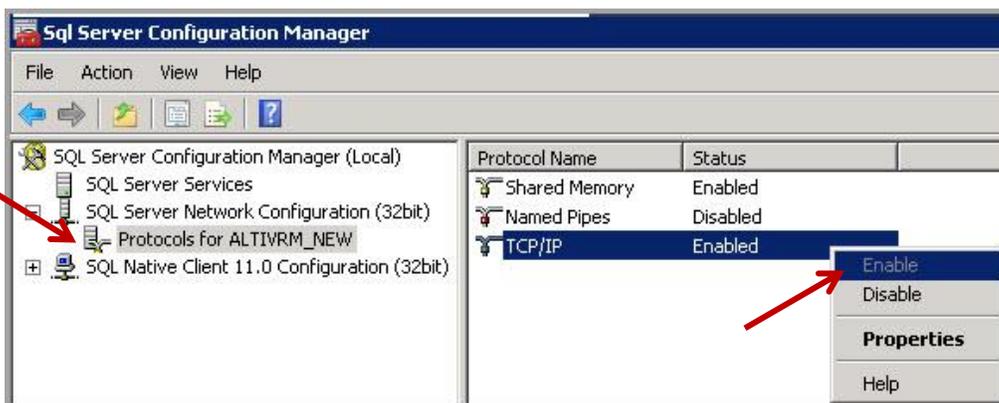
Continue to the next section.

Configuring SQL 2014 Express

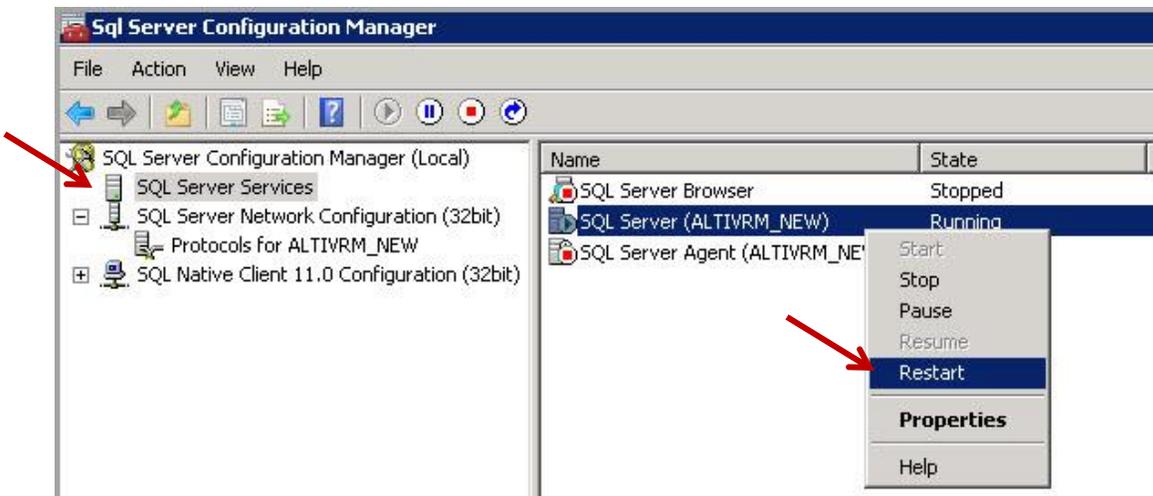
1. From Windows, run *SQL Server 2014 Configuration Manager*.



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



3. Restart SQL Server services for ALTIVRM_NEW.



4. Next, run *SQL Server 2014 Management Studio*.

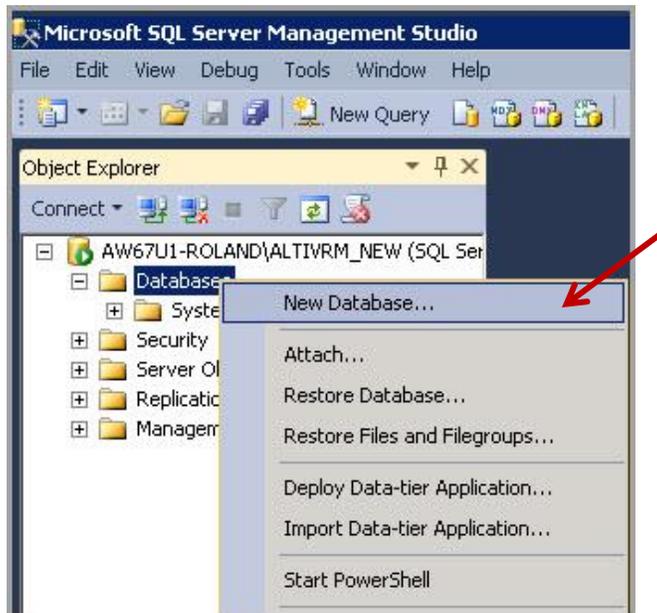


5. On the login panel, if the server name is not correct, select **Browse for more** and select the SQL instance you just installed.

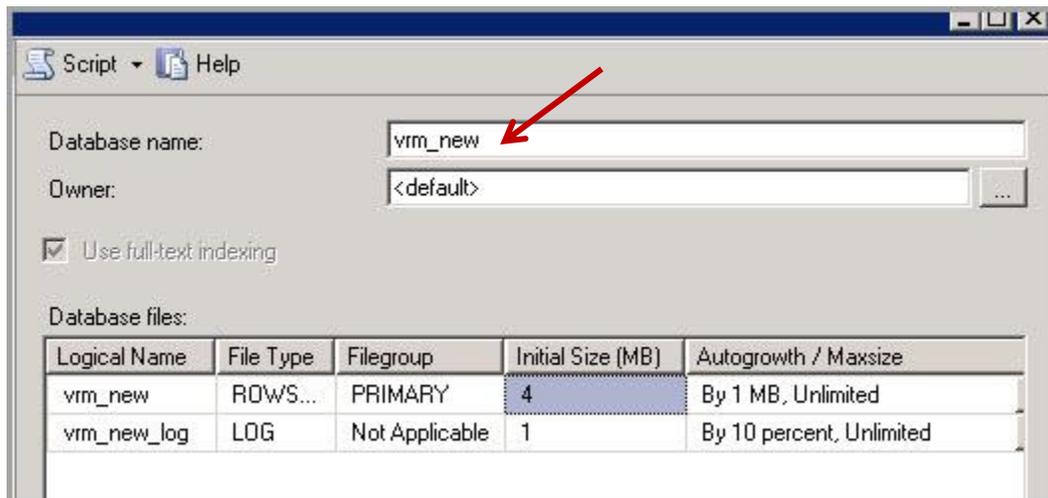


6. After you select the correct SQL instance, click **Connect**.

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



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



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: vrn_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 known 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