



MAX Communication Server  
Release 8.5  
**Upgrade Guidelines**

November 8, 2016

This guide provides guidelines for upgrading from earlier releases of MAXCS to release 8.5.

## Operating System Support

MAXCS Release 8.5 supports Softswitch, hardware chassis, and MAXCS Private Cloud.

The following operating systems are supported:

### Max1000

- Windows 7 32-bit SP1

### Office 3G/2G/Max2000

- Windows 2008 32-bit SP2

### All-in-One Softswitch

- Windows 8.1 Professional 64-bit (supported on Hyper-V version 6.0 and VMware ESX 5.5 and 6.0)
- Windows 7 Professional 64-bit SP1
- Windows Server 2008 R2 64-bit SP1
- Windows Server 2012 R2 64-bit (supported on VMware ESX 5.5 and 6.0)

### Clients

- The MAXCS clients also support Windows 10

## 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.

## Enhancements Included in Release 8.5

The MAXCS 8.5 release includes enhancements. Refer to the *MAXCS 8.5 New Features Guide* for details.

### MAXCS 8.5 Enhancements

#### Unified Communications/ Skype for Business integration

Release 8.5 is fully integrated with Skype for Business, and synchronizes user presence and activity between MAXCS user extensions and Skype for Business clients.

AltiGen's Skype for Business integration is supported only on AltiGen's hosted Skype for Business offering. Support for Skype for Business

MAXCS 8.5 Enhancements	
	<p>hosting by other service providers is not supported.</p> <ul style="list-style-type: none"> <li>• MAXCS monitors and synchronizes user presence and extension activity between the Skype for Business offering and MAXCS servers, whether the account is on premise or in the Cloud.</li> <li>• Organizations without Exchange Voicemail can configure Skype for Business unanswered calls to be directed to the extension's MAXCS voicemail.</li> <li>• MaxAgent and MaxCommunicator can dock with the user's Skype for Business client.</li> </ul>
<b>Integration support for Exchange Online</b>	<p>Release 8.5 now supports Exchange Online, in addition to Exchange On-premise support. Refer to the <i>Exchange Integration</i> chapter in the MAXCS Administration Manual for details.</p>
<b>Multi-level Admin accounts</b>	<p>Release 8.5 offers four different levels of Admin user:</p> <ul style="list-style-type: none"> <li>• <b>Super Admin</b> – The same type as in previous releases.</li> <li>• <b>Full Admin</b> – The same type as in previous releases; these users can manage all three levels of user.</li> <li>• <b>Basic Admin</b> – These users can manage workgroup and extension configurations, in addition to call routing configuration.</li> <li>• <b>Supervisor</b> – These users can manage workgroup configurations and MaxAdmin utilities such as login/out, change password.</li> </ul>
<b>Polycom D60 support</b>	<p>MAXCS supports the D60 DECT cordless phone in one-to-one pairing mode with VVX models. The D60 handset can be paired with a single extension. Polycom firmware version 5.5.0.20556 is required for D60 support.</p> <p>See the separate document, <i>MaxCS Polycom D60 Configuration Guide</i>, for full details.</p>
<b>New Report</b>	<p>A new report has been added; report 2103, Workgroup Trunk Abandoned Call Detail Report.</p>
<b>New SNMP Trap</b>	<p>A new SNMP trap captures this scenario: The voicemail forwarding option <i>Delete Messages After Forward</i> is enabled, and a voicemail message has been forwarded to an email address but the forwarding process failed. In this case, a trap is sent and the failed voicemail email will be forwarded to that extension.</p>
<b>AltiReport Password security</b>	<p>AltiReport now requires you to change the default <i>Admin</i> password.</p>

## MAXCS 8.5 Enhancements

### MaxMobile Android menu support

The Android version of MaxMobile has been enhanced, to support menu access for newer versions of the Android O/S.

## *Changes to Exchange Integration and Account Codes*

Before you begin the upgrade process, be aware of the following changes that are introduced in Release 8.5.

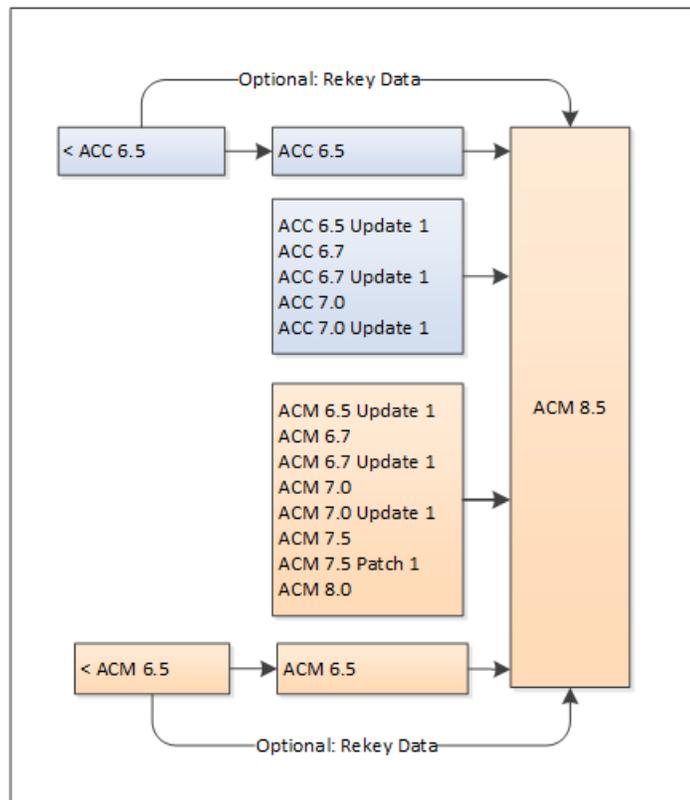
- Exchange Integration has changed significantly from the last release; make sure that you read the *Exchange Integration* chapter of the *MaxCS 8.5 Administrator Manual* carefully before you upgrade. There may be additional steps that you should take for your Exchange configuration, depending upon your current environment.
- Be aware that the settings for extension Account Codes have been moved. In earlier releases, the settings were on the *General* tab. They are now found on the **PBX > Extension Configuration Restriction** tab.

## *Operational Notes*

Be aware of the following limitations in this release:

- **Clients** – You must upgrade **all** of the MAXCS client applications on a desktop before the agent uses any of those applications.

## Software Upgrade Path



It is critical to follow the upgrade instructions to avoid losing configuration data. Product registration is required to obtain the updated license file.

If your version of MAXCS is earlier than Release 6.5, you can do one of the following:

- You can upgrade first to Release 6.5, then upgrade from Release 6.5 to Release 8.5
- You can re-enter the data in Release 8.5

You have the option of re-keying data from any previous release.

### Upgrade Process: MAXCS Premise and Private Cloud

For detailed upgrade steps for various earlier releases, refer to the Readme file in the *MAXCS ACM* folder on the installation media.

Considerations:

- If you are upgrading an NFR system, 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.
- If Exchange integration was used in the previous version of MAXCS server, you must uninstall the Outlook client before you install MAXCS Release 8.5.

**Note:** 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.

To upgrade to Release 8.5, follow this process.

1. Make sure you have the *MAXCS Softswitch Deployment Guide* on hand; you will follow some instructions from that guide in step 7.
2. Review the *Exchange Integration* chapter in the MAXCS Administration Manual before you begin, to be aware of changes that you may need to make to your configuration.
3. Upgrade AltiGen IP-705, IP-710, and IP-720 phones to firmware version 2xAE **before** you begin the upgrade process.
4. If there are any IP Dialing Table entries that have the Protocol set to *H.323*, update them to change the Protocol to *SIP*.
5. Run the *Backup & Restore* tool to back up the existing configuration, voice mail messages, and greetings.
6. Perform the 8.5 upgrade product registration process from the License Information page (either online registration or offline registration) and obtain the 8.5 EXCTL.DAT license activation file from the AltiGen Product Registration portal.
7. For softswitch deployments, install and run the MAXCS 8.5 HMCP Certification tool. The instructions for running this tool are found in the *MAXCS Softswitch Deployment Guide*.
8. Install MAXCS. During this step, when prompted whether to register:
  - For Premise deployments, 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.
9. If your environment is using Polycom phones, you will need to download a certificate; otherwise, the Polycom phones will not work correctly. See the MAXCS *Polycom Configuration Guide* for details.
10. Starting with Release 7.5, MAXCS restructures codec profile settings and performs basic conversion processes. Once the upgrade process has finished, if you are upgrading from a release prior to 7.5, review the updated codec profile settings and adjust them as needed.

Original Codec Profile	Converted MAXCS 8.0and later Codec Profile
G.711 Mu-Law	G.711 Mu-Law
G.711 A-Law	G.711 A-Law
Prefer G723.1; support G729	G723.1, G729
Prefer G729; support G723.1	G729, G723.1
Prefer G.711 Mu-Law; support G.711 A-Law	G.711 Mu-Law, G.711 A-Law
Prefer G.711 A-Law; support G.711 Mu-Law	G.711 A-Law, G.711 Mu-Law

11. After you complete the upgrade process, check your SIP Trunk configuration and make any necessary adjustments.

12. Upgrade **all** of the MAXCS client application on a user's desktop before the agent uses any of those applications.
13. If you have existing Polycom phones that were configured for Release 7.0 or earlier, you **must reset them to the factory defaults and then reprovision them for Release 8**. If you do not do this, those Polycom phones will not work correctly. Refer to the *MAXCS Polycom Configuration Guide* for instructions. You will find this guide in the AltiGen Knowledgebase.

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.

### ***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 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 Release 8.5.

- You must install Release 8.5 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

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 & Restore, 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 MAXCS Administrator *License* menu, select **License Information**. Click the **Registration** button 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 software.

5. After you complete the MAXCS 8.5 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` 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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