

**MAX Communication Server
Release 8.0
Upgrade Guidelines**

**Intended audience:
AltiGen Authorized Partners**

October 13, 2015

This guide provides guidelines for upgrading from earlier releases of MAXCS to release 8.0.

Operating System Support

MAXCS Release 8.0 requires JRE 1.8; therefore, MAXCS 8.0 does not support Windows 2003.

MAXCS Release 8.0 supports Softswitch, hardware chassis, and MAXCS Private Cloud.

The following operating systems are supported:

Max1000

- Windows 7 32-bit SP1

Max2000

- Windows 7 32-bit SP1
- Windows 2008 32-bit SP2

Office 3G/2G

- 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 2012 Server 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 has some system services use ports in the 49152 range). Check your firewall settings and reconfigure them if necessary.
- MAXCS 8.0 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 8.0

The MAXCS 8.0 release includes enhancements in the following areas:

- **Polycom Enhancements** – Refer to the *MAXCS Polycom Configuration Guide* for full details
 - Auto-Provisioning
 - Global Extension Relocation
 - User Password Consolidation
 - Default Local Administrator password
 - Secondary Proxy Support
 - Auto-Generate Digit Map

- Mobile Fallback
 - Firmware Auto-Upgrade (V VX models)
 - Global BLF
 - Expansion Module Support (V VX models)
 - Call Recording Button (V VX models)
 - Transfer and Conference enhancements with Clients (V VX models)
 - Corporate Directory support (V VX models)
 - User Directory Dialing (V VX models)
 - Client Call Control
 - Video call support (V VX models)
 - Auto-Answer Changes
 - Feature Code 33 DND Changes
- **Technology Enhancements** – Refer to the *MAXCS New Features Guide* for full details
 - HMCP Load Balancing
 - SIP Groups
 - Callback from Queue
 - Free Format
 - Expanded SIP trunk support
 - SIP Trunk Release Link Tie (SIP Refer)
 - SIP Trunk TLS Support
 - IPTalk Redirect
 - SIP Delayed Offer Support

Additional Changes in Release 8.0

Before you begin the upgrade process, be aware of the following changes that are introduced in Release 8.0.

- In MaxCS 8.0, the new Java Service Manager can connect **only to the local system**. In addition, earlier versions of the MAXCS AltiGen Java Service Manager will not be able to connect to the MaxCS 8.0 AltiGen Java Service loader.

This change will prevent you from running Java Service Loader Manager from a LAN or WAN connection. The only way to access Java Service Loader Manager now will be from the server itself, via Remote Desktop. This change makes the system more secure. For additional security, change the password for login.
- With Release 8.0, MAXCS no longer supports the configuration of having Softswitch and HMCP on separate servers. If you have such a configuration, contact your sales team before upgrading.
- 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 has some system services use ports in the 49152 range). Check your firewall settings and reconfigure them if necessary.
- AltiGen Phone Group paging uses SIP Tie-Trunk channels in this release.
- If Polycom phones are used, you must select *RFC 2833* for the *DTMF Transport* field in the Codec Profile assigned to the SIP Tie-Trunk. In addition, the Release Link Tie over SIP Tie-Trunk feature is not supported in this configuration.
- The provisioning process for Polycom phones is different in Release 8.0 from in earlier releases. Refer to the MAXCS Polycom Configuration Guide for instructions.

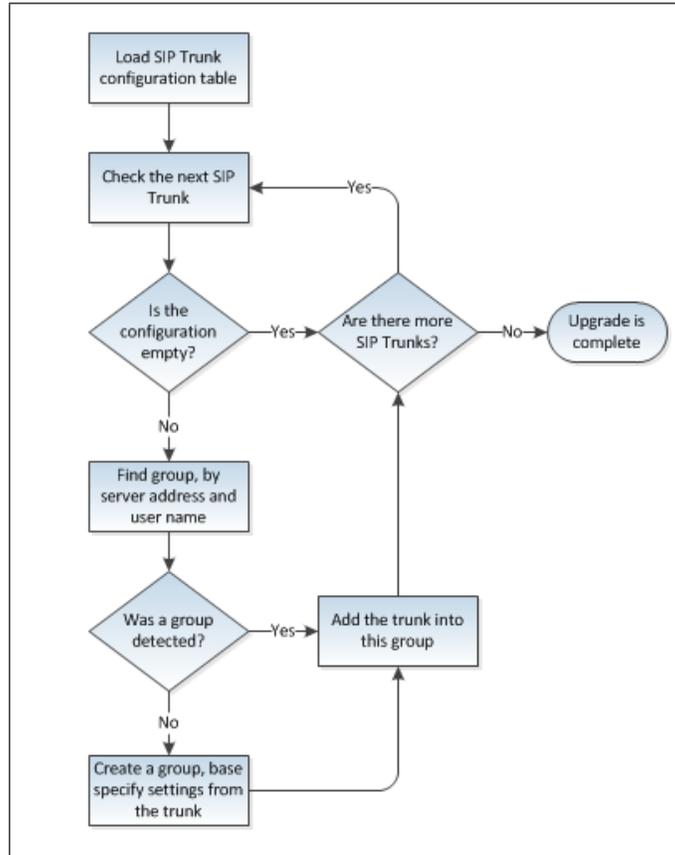
- If you are upgrading from Release 7.0 Update 1 or earlier, carefully review the codec profile conversion after the upgrade process has been completed.

Features no Longer Supported in Release 8.0

- The following features from earlier releases are no longer supported in Release 8.0:
- ACC
- Windows XP and Windows 2003 Server OS for Softswitch
- H.323
 - Important:** Any IP Dialing Table entries that have H.323 set for the *Protocol* field must be changed to *SIP before you upgrade*.
- The *TLS enabled* and *SRTP disabled* settings
- The Persistent TLS connection for SIP Tie-Trunks
- Redundancy
- Multiple Gateway softswitch

SIP Group Conversion

MAXCS 8.0 supports SIP Groups. SIP trunks from earlier releases will be converted to SIP Groups. Once you have completed the upgrade process, you can review your new SIP groups (**Board Configuration > SIP Group Configuration**).



If one group's member trunks have different register periods, we will pick the minimum non-zero number and set that as the register period.

When the conversion process has been completed, a new SIP group configuration table is created. No further conversion is necessary; however, you should review the SIP Group settings after the upgrade process has been completed.

Operational Notes

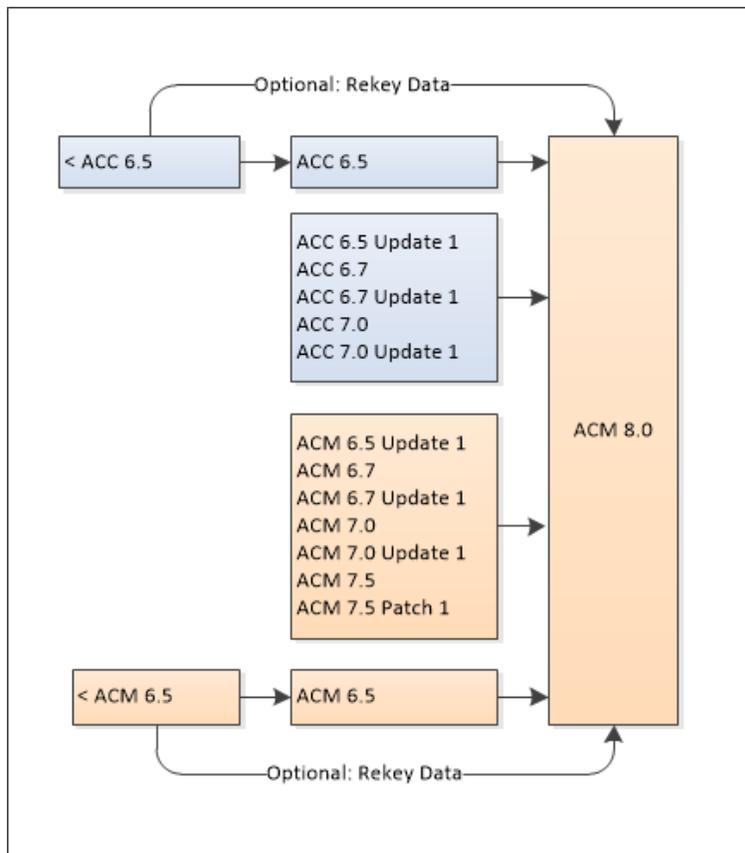
Be aware of the following limitations in this release:

- **AltiGen IP phones** – AltiGen IP phones IP-705, IP-710, and IP-720 must all be upgraded to firmware version 2xAE before you upgrade to MAXCS 8.0.
- **Clients** – You must upgrade **all** of the MAXCS client applications on a desktop before the agent uses any of those applications.
- When a Polycom phone is used and the voice stream goes direct, SIP tie-trunks must use *RFC 2833* instead of *SIP INFO*.
- To log into VRManager, right-click **VRM Admin** and click **Run as Administrator**.
- If a workgroup agent use a Polycom phone, Single Call Handling will automatically be enabled, regardless of the workgroup's *Intra Group Call Distribution* setting.
- When a Polycom user places a call on hold via a MAXCS client, no dial tone will be played.

- With AltiGen SIP trunks, you must use 11-digit numbers when configuring DNIS routing.
- When you upgrade to Release 8.0 from earlier releases, if your environment’s LDAP service is disabled, the upgrade process will not enable it. If you later want to enable LDAP, open the file \AltiServ\db\Storage\LdapSetting.txt and change DisableLdap to 0 and re-enable the AltiGen LDAP Service. The re-start the system. Note that if the LDAP Service has been disabled for a very long time, it could be out of date, which could result in configuration issues.

Software Upgrade Path

MAXCS 8.0 supports ACM only. ACC Agent seats will automatically be upgraded to ACM Agent seats. No additional SA will be incurred during the upgrade process. Note that ACM SA charges, instead of ACC, will be used for the next SA renewal. For details on SA renewal, contact your AltiGen representative.



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 8.0
- You can re-enter the data in Release 8.0

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 8.0.

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 8.0, 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 6. This guide is stored in the AltiGen Knowledgebase. Click [here](#) to log in and download article 1191.
2. Upgrade AltiGen IP-705, IP-710, and IP-720 phones to firmware version 2xAE **before** you begin the upgrade process.
3. If there are any IP Dialing Table entries that have the Protocol set to *H.323*, update them to change the Protocol to *SIP*.
4. Run the *Backup & Restore* tool to back up the existing configuration, voice mail messages, and greetings.
5. Perform the 8.0 upgrade product registration process from the License Information page (either online registration or offline registration) and obtain the 8.0 EXCTL.DAT license activation file from the AltiGen Product Registration portal.
6. For softswitch deployments, install and run the MAXCS 8.0 HMCP Certification tool. The instructions for running this tool are found in the *MAXCS Softswitch Deployment Guide*, beginning on page 8.
7. 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.
8. 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.
9. 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 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

Original Codec Profile	Converted MAXCS 8 Codec Profile
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

10. After you complete the upgrade process, check your SIP Trunk configuration and make any necessary adjustments.
11. Upgrade **all** of the MAXCS client application on a user's desktop before the agent uses any of those applications.
12. 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 8.0.

- You must install Release 8.0 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 8.0** option, and then obtain a new `EXCLT.dat` file.
4. Install the new operating system on the server, and then install the MAXCS Release 8.0 software.
5. After you complete the MaxCS 8.0 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 MASCS 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 8.0 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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