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Infinity Upgrade Installation Instructions

Software Release 5.51

Effective July, 2009

Note: The instructions contained in this document apply to all software version 5.51.x upgrades, for systems already running Infinity software version 5.50.xx. Customers converting from 5.40 or older versions must review this document and 5.11- 5.40 upgrade notes.

Inventory:

Customer should have received the following software diskettes and CD's based on system type:

Single Chassis Type I systems:

232CD016 Infinity Server Install CD (Can be used instead of the 232S738 and 232S752)

232S738 TCP/IP host diskette

232S752 Prompt upgrade diskette revision H or higher

232CD004 Workstation application CD

Multi Chassis Type II systems:

232CD016 Infinity Server Install CD (Can be used instead of the 232S739 and 232S752)

232S739 TCP/IP Host diskette for the DB server

232S740 TCP/IP Telephone Service diskette

232S752 Prompt upgrade diskette revision H or higher

plus

232CD004 Agent Workstation Applications CD

All sites! Please check with Amtelco Field Engineering to verify if the following CD's may be required:

232CD011 Web Applications CD

232CD020 Ultracomm 4.x install

232CD008 Printer Capture CD

The Server memory requirement for *Infinity* 5.51 is 256 megabytes of memory. It may be necessary to increase the amount of memory on the processor for the Single Chassis or DB server.

Existing configuration review:

Customer should have at least 1 recent, full, successful tape backup. It is recommended that a full backup be tested at Amtelco prior to scheduling the upgrade. Tape backup testing is available up to 4 times a year for Service Contract customers for no charge. Confirm that recent backups have been made to the archive.mdb and mdr.mdb files.

Please confirm with Amtelco Field Engineering that no special patches or Software configuration changes exist that have not be integrated in the newer version. Field Engineering will generally confirm this by dialing into the Infinity system prior to upgrade, they will do a comparison between common patches and the patches found on your Infinity server. All unique patches must be sent to Software for confirmation and instruction.

Customer should confirm the location of existing drive carrier keys and chassis key (for 20 slot chassis on wheels).

Amtelco Field Engineering should confirm with the customer that both drives are on line and are mirrored!

The customer will be required to restart all applications after the upgrade, it is extremely important that the customer has all passwords and access to all workstations and servers!

All peripheral software applications listed will require upgrades (except those noted)!

- **Web Applications must be upgraded prior to scheduling the 5.51 Infinity upgrade. The Web applications must be version 1.1.2.13 or greater. The Amtelco Web application now also requires 2.0 .Net Framework (see .net section following).**
- **MDR upgrades are recommended but not required. MDR capture 3.03.24 or greater should be installed (the procedure is included below).**
- **Site using Network Printer capture must install version 2.23a prior to scheduling the 5.51 server upgrade.**
- **Only Rhetorex and Amtelco H.100 voice board users can upgrade to the 5.50 and 5.51 *Infinity* server versions.**
- **Additional station ports 5201 thru 5400 are available with the Infinity 5.51 release. Stations ports above 5200 are a separate pay-for option; please contact the Amtelco Sales department for more information. Additional ports can be enabled during the upgrade process to version 5.51. Additional ports will necessitate the 256 meg of memory on the Infinity server and will require some additional down time during the *Infinity* restart process.**

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Peripheral components include the following:

- Telephone Agent (**Take care to document the current network settings prior to upgrading!**
If current version is older than 5.11)

Currently Windows 2000 and XP operating systems are required for workstations using the Telephone Agent or Supervisor applications and highly recommended for all applications! Workstations must have 512 meg of memory (1GB recommended) and match the minimum specifications described in the 232M056 System Specification Manual.

- Supervisor
- OnCall Supervisor
- Web applications, including eResponse (Check with Amtelco Field Engineering)
- Voice logger (check with Amtelco Field Engineering)
- MDR
- Report Generator (check with Amtelco Field Engineering)
- Network Archive
- IBOE and Backup Operator
- Client Import/Export, Directory Import/Export, Real Time Import/Export (RTI)
- Auto Call Gateway (check with Amtelco Field Engineering)
- Pinter Capture (Network only)

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The Infinity Intelligent Series applications incorporate the Microsoft .NET Framework software to span workstations and servers and to better connect people, information, systems and devices. The Microsoft .NET Framework is an integral component of the Microsoft Windows platform for building and running the next generation of software applications and web services.

The .NET Framework is composed of a unified set of class libraries and a common runtime language. Implementing the .NET Framework makes it easier for Amtelco to build, deploy, and administer secure, robust, and high-performance applications that better meet the needs of call centers and healthcare institutions, both now and in the future.

The Microsoft .NET Framework and MDAC software is the only additional workstation software required implementing the Infinity Intelligent Series applications in the configuration of a call center upgrading to Infinity 5.40 from Infinity 5.30.

The .NET Framework version 2.0 (dotnetfx.exe) is a re-distributable Microsoft install file that is included on the Workstation CD; it is also available on the Amtelco FTP site or directly from Microsoft downloads. Searching Microsoft support for dotnetfx.exe or using the following link can find additional information about dotnetfx.exe install:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=0856eacb-4362-4b0d-8edd-aab15c5e04f5&displaylang=en>

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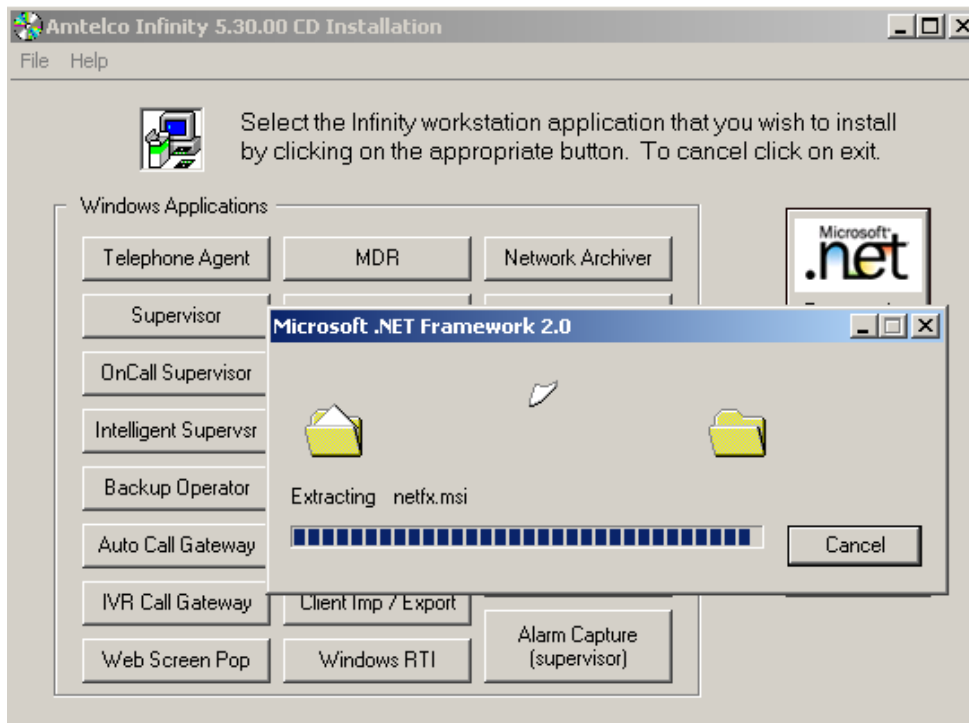
Customers upgrading from Infinity 5.40 and 5.50 already have the correct version of Microsoft .NET support loaded and can skip this section! Customers upgrading from versions prior to 5.40 should install the 2.0 .NET on the workstations prior to scheduling the server upgrade!

Microsoft supports this install for the following operating systems: Windows 98, Windows ME, Windows NT (Service pack 6a required), Windows 2000 and Windows XP.

Amtelco currently requires Windows 2000 or Windows XP operating systems for workstations running Telephone Agent or Supervisor, please check with Amtelco Field Engineering if you have questions about which operating system is required.

Please check for updates on the .NET install by contacting Amtelco Field Engineering, Microsoft support, or your local Network Administrator.

The simplest way to install dotnetfx.exe is to close all programs, insert the 5.50 Amtelco workstation CD and select the .NET button from the menu as shown below:



The install file is also located in the \DotNet folder.

Select yes to confirm the install, you will be required to accept the license agreement to proceed, Restart the computer if prompted.

Upgrade Procedures for Infinity Host Server Version 5.50.x to 5.51:

Average server downtime is estimated at 12-18 minutes.

The following procedure assumes inventory and existing configuration steps have been completed. Amtelco Field Engineering should be dialed into the remote diagnostic modem and be on the line prior to starting this upgrade.

1. Log out Operator (Telephone Agent) and Infinity Supervisor on a few workstations. Close all applications including voice logger (if running). Un-install the current versions of Telephone Agent and Intelligent supervisor (if loaded). Upgrade the applications to the appropriate 5.51 release. Reboot these machines so they are ready for use after the server upgrade. **These machines will not function until after the 5.51 server upgrade.**
2. Verify Amtelco Field Engineering is dialed in. Optionally Amtelco Field Engineering can block new calls from being processed to aid the operators in logging out.
3. Log out all remaining operators
4. This step is required for Telephone servers (T-Severs) but is **optional** for Single Chassis Servers and DB Servers.
 - a. At the C:\MCI prompt Type: **MD OLD** (if it does not exist)
 - b. **Copy *.* OLD**
 - c. **Overwrite all if prompted**
 - d. **Server CD go to step 8, floppy install go to step 5.**
5. Insert the appropriate host diskette
6. Reboot the Infinity Server, monitor for errors.
7. When prompted that the upgrade is complete remove the host diskette and reboot the Server.
8. **Server CD installs!**
 - A. Insert the 232CD016 Server Install CD
 - B. A menu will be display with two options, 1 Update the host software or 2 Configure a new system Infinity system. **Select option 1.**
 - C. Select the appropriate server type (normally option 1 single chassis)
 - D. The upgrade will run, remove the CD and reboot when complete.
9. Amtelco Field Engineering must run conversion routines and updates to the system variables; a second restart will be required prior to operators logging in.
10. Once the server has completed resetting, Amtelco Field Engineering will ask you to log in on converted machines with Telephone Agent and as a Supervisor. We will ask you to test inbound and outbound calls and voice mail (by calling the Check-in line or a line with a Voice Greeting).
11. Applications that normally auto log in after restarts like: MDR, Ultracomm, eResponse, eVoicelink, Printer Capture, the Infinity Server service (web applications), will need to be manually reset at this time.

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12. Verify all applications required have been upgraded and tested.
13. Complete a new full system backup.

Upgrade MDR and the MDR.MDB:

The following instructions are for upgrading the MDR and MDR.MDB applies to sites running version 5.11 Infinity server software and MDR 3.00.00 or greater. Sites running older software will perform the upgrade defined in the 5.11 upgrade document (they will simply use the MDR program and conversions included with 5.30).

Do not attempt this part of the upgrade if your current MDR version is not a 3.00.00 or greater version! The MDR and CTE database sizes should not be above 1500 MB. If they are, you will need to purge/compact the databases prior to running the upgrade. We recommend backing up MDR and CTE MDB files prior to upgrading!

1. Upgrade the MDR Capture program to the newest version found on the 232CD004 workstation CD.
2. Open the MDR Capture program. The MDR Upgrader program will open in addition to normal MDR Capture and will make all of the necessary database changes.
3. After the Upgrader completes, close all open MDR windows, and restart the program.
4. Select the Import button on the MDR Capture program.

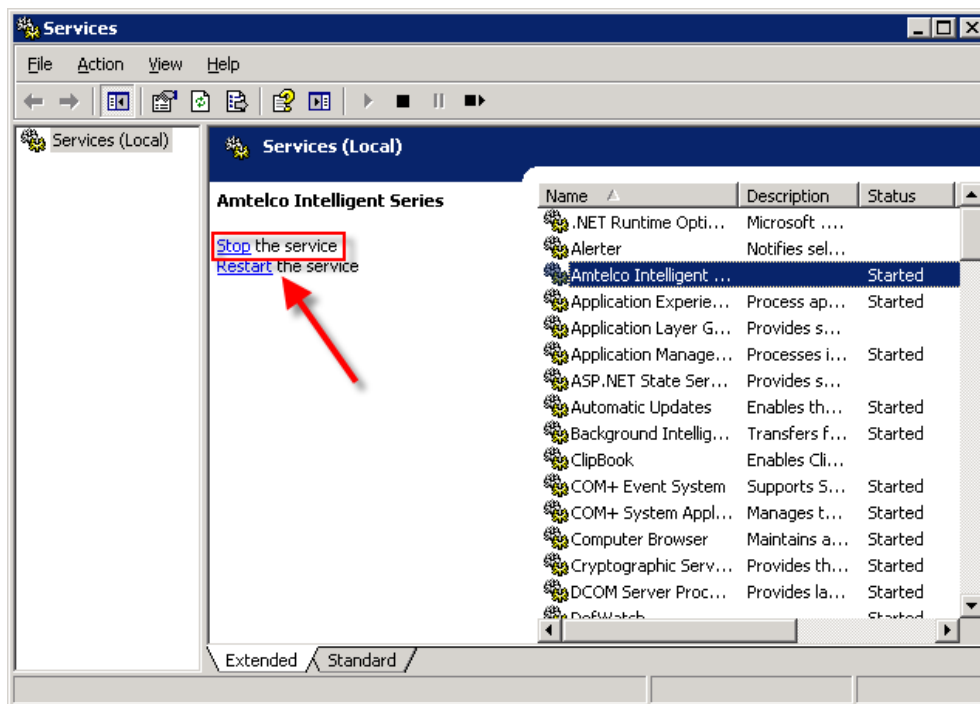
Upgrading the Intelligent Series Server

Pre-upgrade discussion

- We strongly recommend that you back up your Intelligent database on your SQL server before moving ahead with the upgrade. (Assistance with backing up your IS database can be found in the Application Maintenance manual on Techhelper).
- When you stop the Amtelco Intelligent Series service (explained later in this document), no operators can access accounts with programmed Intelligent Series features (e.g., Intelligent Messaging, Intelligent Info Pages, and/or Intelligent Directories). Consider doing the upgrade during a slow call processing time.
- The Intelligent Series server upgrade must be done in succession with upgrades on the *Infinity* Telephone Agent and IS Supervisor programs. Please contact Amtelco Field Engineering if you have any questions or concerns.

IS Server upgrade

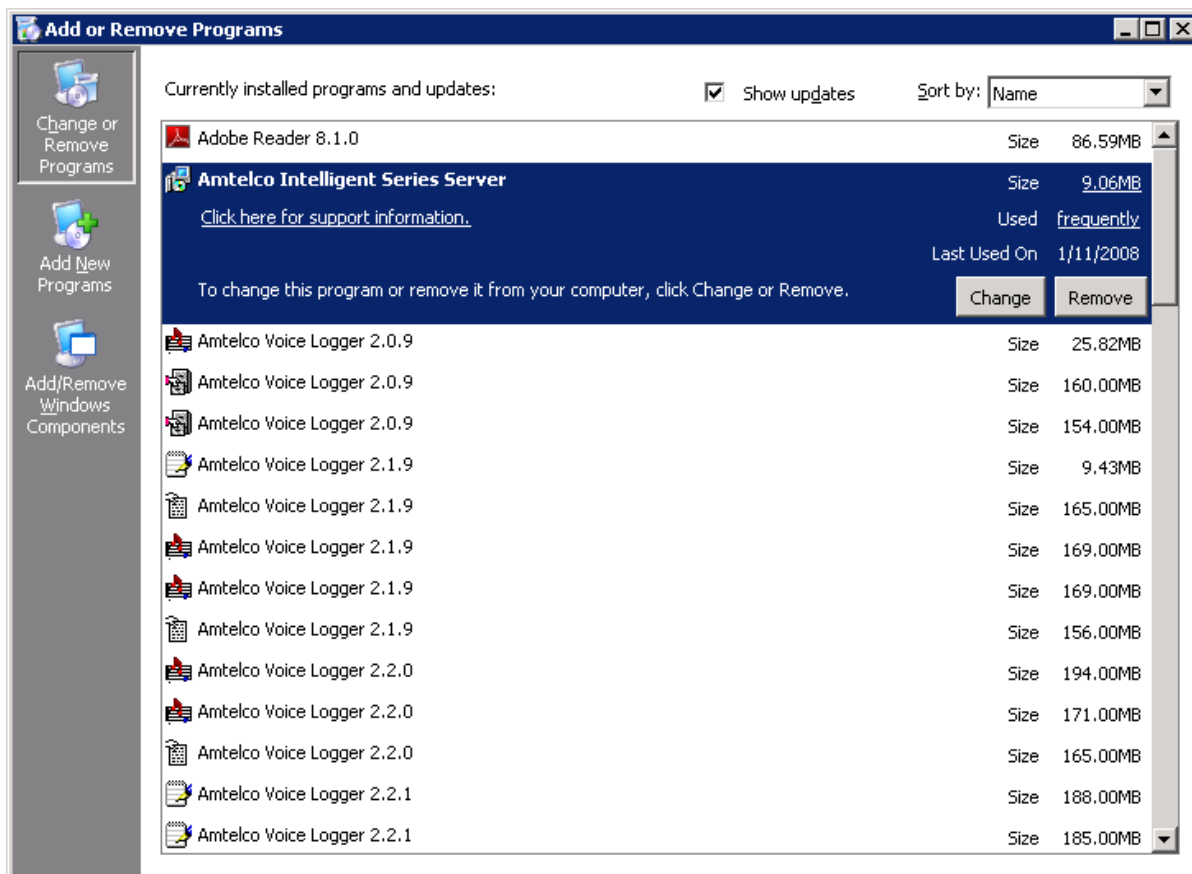
1. Stopping the Amtelco Intelligent Series service:



- a) Access the Services console and locate the 'Amtelco Intelligent Series' service and "Stop" it.

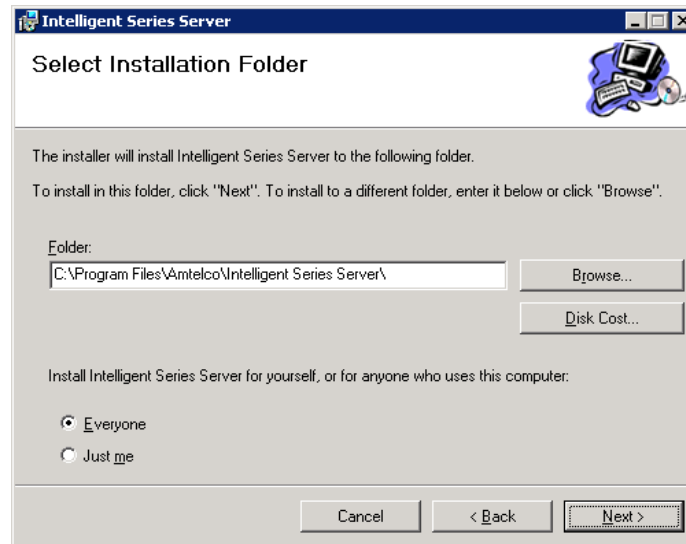
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- b) Close the Services console window.
2. Go to Start - Control Panel - Add/Remove Programs. Locate “Amtelco Intelligent Series Server” and click ‘Remove.’ After the program is removed, close the Add/Remove programs window.

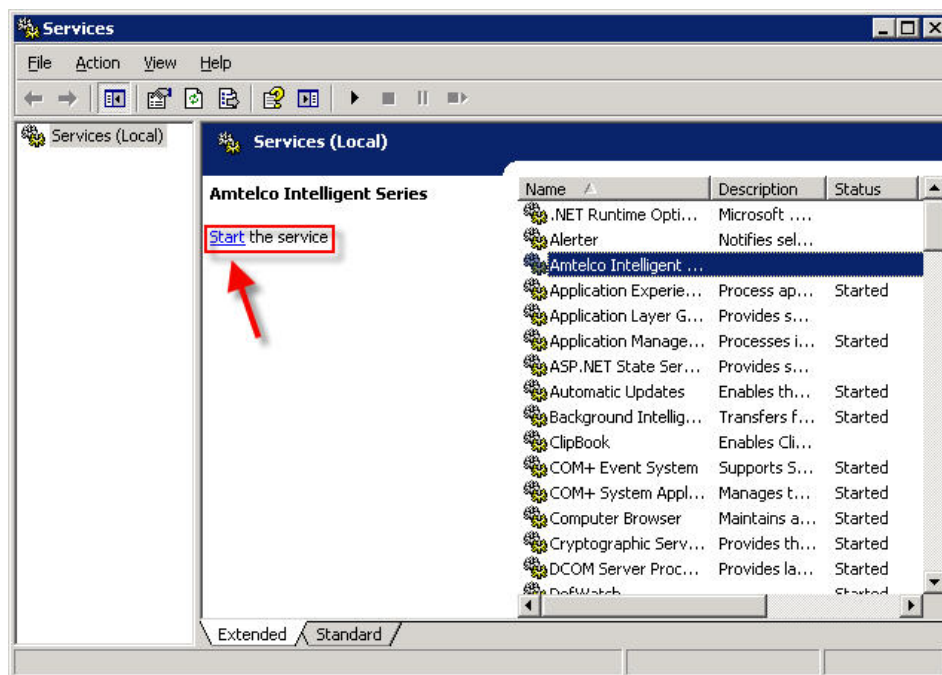


3. Run the newly downloaded Setup.exe and install the Intelligent Series Server program.

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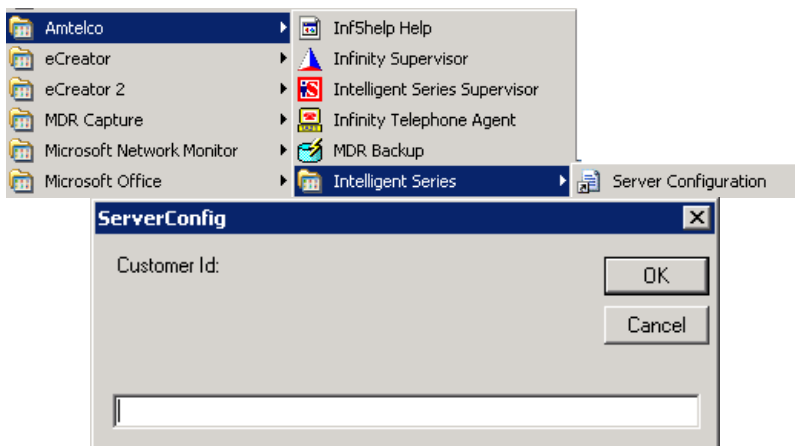


4. Starting the Amtelco Intelligent Series service:



- a) Access the Services console once again and “Start” the ‘Amtelco Intelligent Series’ service.
- ### 5. Open the Intelligent Series Server Configuration program:

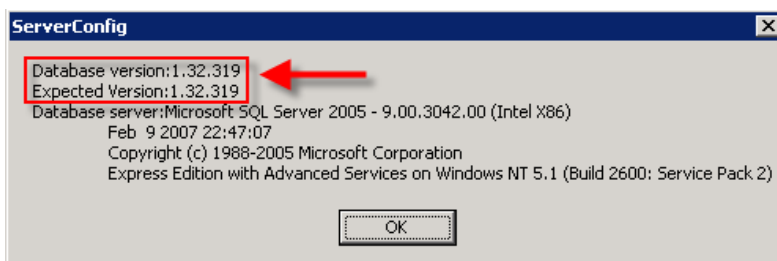
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b) Enter your IS Customer Number and click 'OK'

6. Checking the database upgrade:

a) Click on the 'Database' tab and then click on the 'Database Version' button



b) A successful database upgrade has only taken place if the Database version number and the Expected version number matches.

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List of New Features

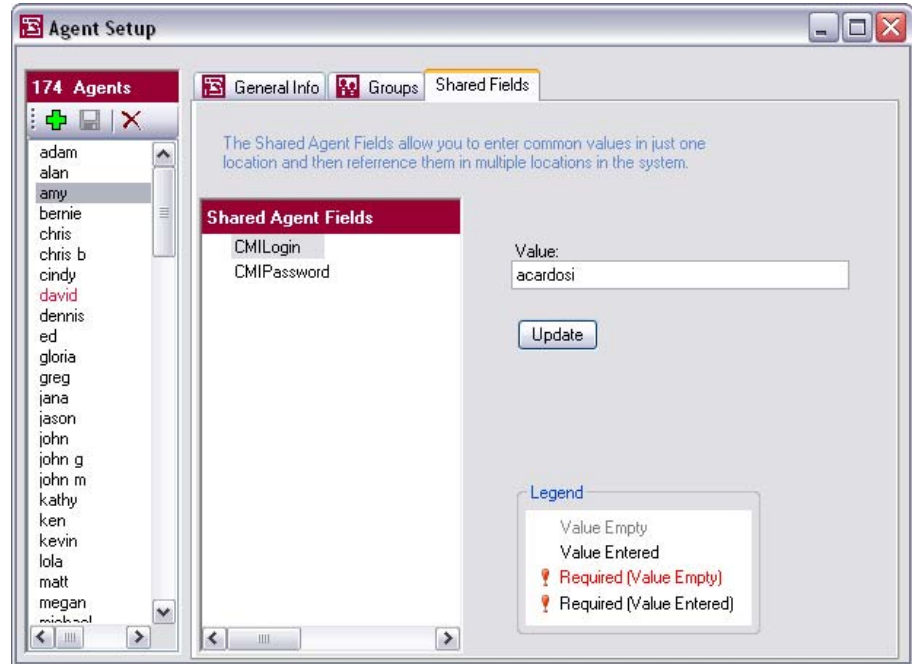
Please note that some of the following features may require additional licensing of hardware.

FEATURE	DESCRIPTION
64 CDT Groups	The number of call distribution groups has increased from 32 to 64. This doubles the number of groups available. Additional costs involved please contact Amtelco Sales.
Disconnect Alert	An alert called Disconnect Alert has been created that will flash the call state on an operators call line if the call has been on the in a call slot for more than a specified number of seconds. A sound can be played when the alert is triggered. An event can also be printed out on the system printer.
400 Stations	The number of operator stations that can be connected to one Infinity server has been increased from 200 to 400. This doubles the number of stations. This increase does not apply to servers running NetBIOS. Additional costs involved please contact Amtelco Sales.
128 CDTs	The number of Call Distribution Tables (CDTs) has increased from 100 to 128. Additional costs may be involved please contact Amtelco Sales.
500 Perfect Answer Greetings	The number of Perfect Answer greetings per account has increased from 250 to 500. This doubles the number of Perfect Answer greetings per account. Additional costs may be involved please contact Amtelco Sales.
Inter-Chassis Conference Ports for Unity Logger	The conference ports for Unity Logger when using a multi-chassis Infinity Server have been changed. Previously, Unity Logger conference ports had to occupy valid Infinity port numbers. Now Unity Logger conference ports occupy port numbers above 1537, with 64 ports per telephony server. This frees Infinity port numbers to be used for incoming and outbound calls.
IS Gateway	The Intelligent Series (IS) Server can now dispatch messages through Infinity distribution. This requires IS Gateway service.
Sandbox	The Sandbox can be enabled on a per-account basis to display the Sandbox search window when a call to that account is answered.

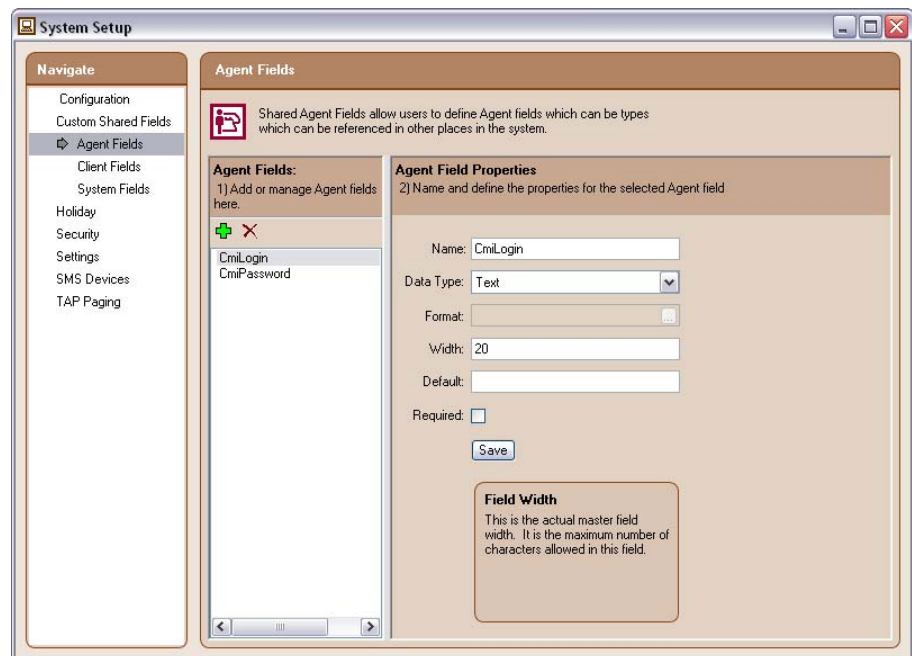
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Agent Shared Fields

Agent Fields are fields that can be referenced throughout Infinity Intelligent Series but which hold different values for each agent ID. Agent fields can be used to reference information about an agent that isn't inherently part of the Intelligent Series system, for example agent fields called CmiLogin and CmiPassword could contain each agent's login and password for an Amtelco's Client Management Intelligence (CMI) database.



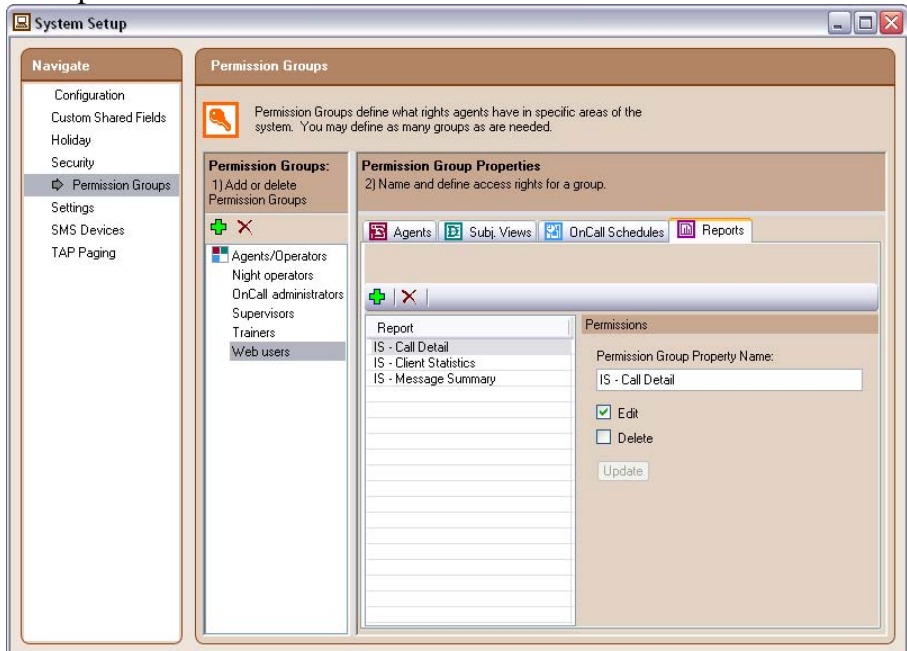
Agent Fields are created in System Setup under Custom Shared Fields on a new page called Agent Fields.



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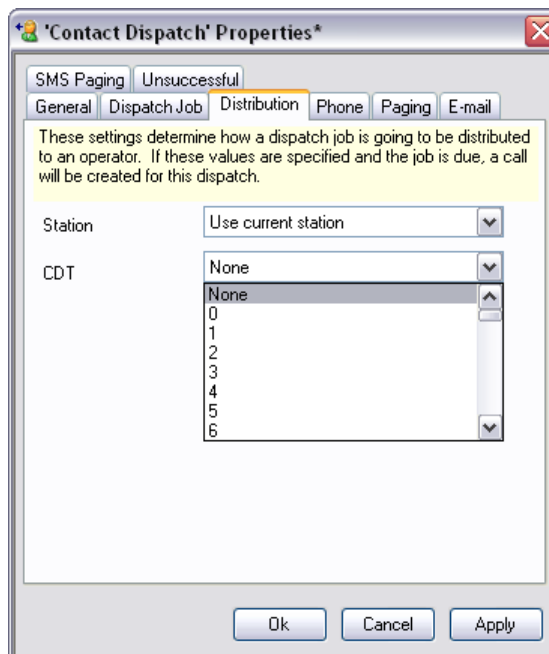
Reports Permissions

In System Setup, a new Permissions Group Properties page has been added to control access to IS Reports. The Reports tab is used to control which reports are available through the IS Web and whether the reports can be edited or deleted.

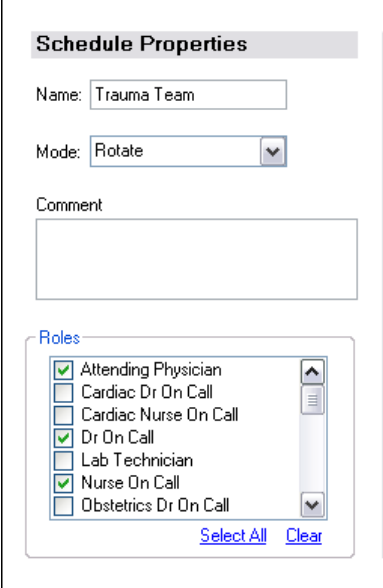
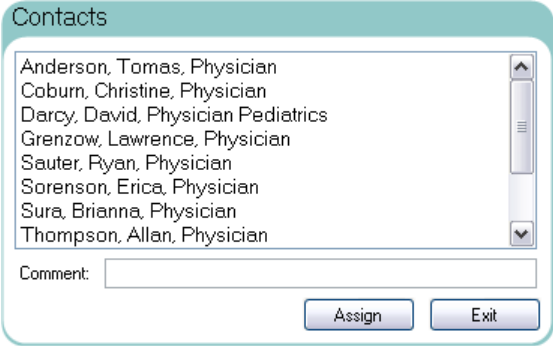


Dispatch Distribution

The Contact Dispatch and Send to Dispatcher response element properties now include a Distribution tab. The settings on the Distribution tab allow you to set a call to be created when a dispatch job is due. The call can either be directed to the station of the operator who was last working on the call, a specific station number, or an Infinity Call Distribution Table (CDT).



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<p>IS Directory OnCall Comment Fields</p>	<p>Comment fields have been added to IS Directory OnCall in two locations.</p> <p>In Schedule Properties, the Comment field is used to add information about a schedule. This information at the top of the OnCall Schedule whenever the schedule is displayed.</p>  <p>When assigning a contact to a shift, the Comment field can be used to add a comment to a shift assignment. This comment is displayed next to the shift assignment in the OnCall schedule.</p> 
<p>Coming Soon! IS Time Zones</p>	<p>Amtelco is currently adding IS Time Zones to <i>Infinity</i> version 5.51. This feature will allow you to set a time zone offset for each Intelligent Series Client account and each IS Directory OnCall schedule.</p>
<p>Unity record patches</p>	<p>A per client Infinity option has been added to server versions 5.51.05 and greater to record operator initiated patches.</p> <p>Additional costs may be involved please contact Amtelco Sales.</p>

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Unity record PBX calls	A per client Infinity option has been added to server versions 5.51.05 and greater to record PBX calls. Additional costs may be involved please contact Amtelco Sales.
SMS messaging	SMS inbound/outbound messaging support has been added to Infinity Server versions 5.51.05 and greater. A separate white paper for Infinity SMS messaging is available. Additional costs may be involved please contact Amtelco Sales.