

ProCall 6 Enterprise Upgrade Process

Best Practice

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Introduction

Dear Sir or Madam,

First of all, we would like to thank you personally for your continued confidence in the products of estos GmbH.

As a previous user of ProCall Enterprise, we sincerely hope that we will persuade you with our latest version and invite you to thoroughly explore the new features of ProCall 6!

To ensure that this runs as smooth as possible, we recommend that you read this document carefully. We will then describe various migration scenarios that will provide you with valuable tips and help you with a smooth transition to ProCall 6 Enterprise from older versions. In this way you can avoid the possibility of loss of accessibility or loss of data.

Note

This documentation is intended for certified estos partners who have already successfully completed training courses for ProCall Enterprise, or an update training course for ProCall 6 Enterprise.

1. Preparations

1.1. Updating software

Before upgrading the existing ProCall Enterprise installation, it must be brought up to date.

- **Upgrade from ProCall Enterprise 4**
Update your installation to the latest version of ProCall 4 Enterprise (at least 4.1.40.37636).
- **Upgrade from ProCall Enterprise 5**
Update your installation to the latest version of ProCall 5 Enterprise (at least 5.1.113.47026).

Note

There is no direct upgrade path from older versions. To upgrade, you must first perform all upgrade steps of the versions in between, e.g. Upgrade from ProCall 3 Enterprise to ProCall 4+ Enterprise, followed by the upgrade from ProCall 4+ Enterprise to ProCall 5 Enterprise.

1.2. Secure data

Before you start the upgrade of the installation, you must perform a data export of all data in the UCServer under **File >> Data export** and, if possible, create a backup of the existing installation. If you are running the UCServer with a Microsoft SQL Server database connection, it is recommended to create a backup of the database.

1.3. Preparing user administration

1.3.1. Internal user administration

You use the internal user administration in the UCServer. You do not need any special (or other) preparations for the update.

1.3.2. Active Directory

If Active Directory is used as the data source for users, groups, and computers, you must consider the following. If the schema extension is used in ProCall 4+ or 5 Enterprise, the schema must be extended again for ProCall 6 Enterprise to continue using Active Directory.

Note

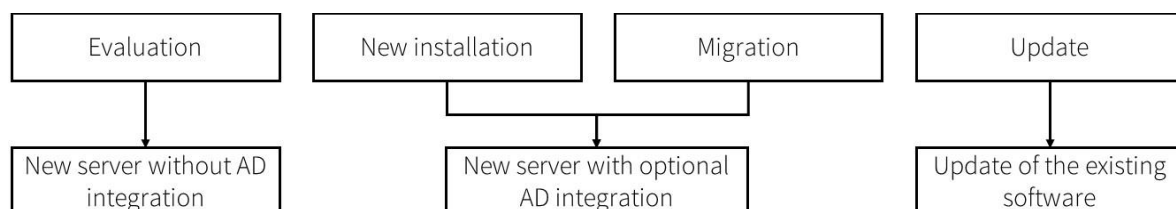
The schema extension of ProCall 6 Enterprise is compatible with older versions (at least 4.1.40.37636 or 5.1.113.47026) from ProCall Enterprise. Parallel operation of different versions in Active Directory is thus possible. i.e. You can continue to run your existing installation at the same time with a version of ProCall 6 Enterprise.

1.4. ProCall Analytics

If you are using ProCall Analytics, you must upgrade it to version 2.0.3.48516 at least, in order to be able to continue using it.

2. Upgrading

In the following image, the recommended procedure for certain upgrade scenarios is given without any consideration for special cases.



1. There is nothing special to consider in an **evaluation**.
2. Even with a **new installation**, there is nothing special to note. You only have to decide whether you must perform the schema extension of Active Directory as well, as described above.
3. If you want to perform a step-by-step **migration**, you must first perform a **new installation**. After this, you have the option of migrating users and user groups one at a time.
4. When **updating** the software, all data and settings on the server are automatically transferred or migrated, but this means that all clients of version 5 are no longer connected and must be updated immediately.

Caution

After updating the ProCall Enterprise clients to Version 6, it can no longer be operated with an older version of UCServer.

In the remainder of this document, the recommended procedure for **updating** an existing installation is described.

2.1. Updating the server software

Caution

While the software is being updated, the ProCall Enterprise installation is not functional and cannot be used. Please make all necessary organizational preparations in advance.

Install the UCServer installation package on the same server as your current ProCall Enterprise installation. When the software is updated, all data and settings on the server are automatically transferred or migrated.

Database conversion

When upgrading, the journal and chat databases are converted to the new ProCall 6 Enterprise schema and are **no longer compatible** with older versions of ProCall Enterprise.

Note

When converting the data, the existing chats are migrated to the new chat system of ProCall 6 Enterprise. Depending on the amount of data, the process may take several hours. Please plan for this with the update.

2.2. Updating the client software

ProCall Enterprise for Windows workstations

The clients can be updated either manually at each workstation by starting the installation program or they can be rolled out using the UCServer's software distribution. If you installed the automatic client update service in this version, the new client software is installed without any further user interaction.

All client-specific settings are also included. Favorites and lines are obtained directly from the server and have already been modified when the server is updated.

ProCall Mobile – native apps for iOS and Android

The ProCall Mobile clients have been completely redesigned. This makes old versions of ProCall Mobile no longer compatible with ProCall 6 Enterprise. Either you manually install the appropriate app ("ProCall 6 Mobile") from the App Store on any mobile device, or use the **Configure and Invite Users ...** feature of the UCServer. Users will be notified by e-mail and will receive all information on how to start up the app.

ProCall Enterprise for Mac workstations

The ProCall macOS client has been completely redesigned. This makes older versions no longer compatible with ProCall 6 Enterprise.

3. Completing the upgrade

Most of the settings are either directly converted and adopted (in the case of an update) or can be exported and imported again (when migrated or evaluated on another server).

3.1. UCServer Web Services

The UCServer Web Services known from ProCall 5 Enterprise for connecting the mobile apps and the macOS clients have been discontinued. The connection is made from ProCall 6 Enterprise via a web service integrated in the UCServer. If you want to contact the web service only from your LAN, you can continue with the standard installation. If you have published UCServer Web Services on the internet, you must publish the integrated Web service again. Please proceed as described [here](#).

3.2. Multiline TSP

If you use the Multiline TSP for remote terminal servers to obtain lines from the UCServer, you must also update them to the latest version so that the lines are available again after the update.

3.3. Calendar replicator

If you are using the calendar replicator to schedule server-side synchronization, it must be updated to the latest version.

3.4. SIP and XMPP proxy

If you are using the SIP or XMPP proxy, you must also upgrade it to the latest version.

3.5. Templates

Custom templates stored in the "templates" folder in the server program directory must be manually copied to the equivalent folder of the UCServer. Please validate again so that the templates operate correctly.

3.6. Business Process Integration (CEBP)

If integrations such as call window extensions or XSLT adjustments have been carried out on the ProCall Enterprise client, they must be checked for functionality after the update, before transitioning to regular operation.

3.7. SDK add-ins

SDK add-ins must also be re-enabled and verified.