

Upgrading from CallRex 4.3 to Quality Management Suite 5.3

This document contains information about how to upgrade CallRex 4.3 to Quality Management Suite 5.3. It covers the following:

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Changes to Quality Management in Version 5.3

The component architecture of CallRex 4.3 and Quality Management Suite 5.3 are the same, with the three major components being:

- The **Data Service**, a Windows Service that manages SQL database access and Quality Management Client connections.
- The **Quality Management Database**, a Microsoft® SQL Server 2005, 2008, or 2012 hosted database that is manipulated by the Data Service and typically installed on the same host as the Data Service.
- The **Call Recording Service**, a Windows Service that handles call and screen based recording tasks. The service can be installed on the same server as the Data Service, and is also installed at remote sites that require media recording.

Changes to Client

The **Quality Management Client** software is a browser based Microsoft® Silverlight® application hosted by the Internet Information Services (IIS) service on the Data Service host as it was in CallRex 4.3. The Quality Management Client software can run on any current version of Windows or OS X that supports the Microsoft Silverlight 5.0 runtime environment. If Silverlight is not already installed on the machine, the user is prompted to install it the first time the Quality Management Client application is run.

The following web browsers are supported:

Supported Web Browsers								
Operating System	IE 11	IE 10	IE 9	IE 8	IE 7	Firefox 3.6+	Safari 4+	Chrome 12+
Windows 8 Desktop		* (32-bit & 64-bit)				*		*
Windows 8.1 Desktop	* (32-bit & 64-bit)							
Server 2012		* (32-bit & 64-bit)				*		*
Server 2012 R2	* (32-bit & 64-bit)					*		*
Windows 7			*	*		*		*
Windows 7 SP1	* (32-bit & 64-bit)		* (32-bit & 64-bit)	*		*		*
Server 2008 SP2					*	*		*
Server 2008 R2 SP1			* (32-bit & 64-bit)	* (32-bit & 64-bit)		*		*
Vista			*	*	*	*		*

Environmental prerequisites

Quality Management 5.3 supports all PBXs supported by CallRex 4.3 with the exception of 3Com NBX.

Upgrading versions of CallRex preceding version 4.x require an upgrade to CallRex 4.3 prior to upgrading to Quality Management Suite 5.3.

Server prerequisites

Quality Management 5.3 can be installed on any of the following operating systems:

- Windows Server 2008 x86, x64, x64 R2
- Windows 7 x86, x64
- Windows 8 x86, x64
- Windows Server 2012
- Windows Server 2012 R2



Note

Windows XP and 2003 are no longer supported. Windows 7 and Windows 8 are not supported for ShoreTel deployments.

Before installing Quality Management 5.3, install the following components on **all** servers:

- The full version of the .NET 4.5 framework (not the client-only version).

Download and install it from <http://www.microsoft.com/en-us/download/details.aspx?id=30653>

The .NET Framework 4.5 installer will warn you that the following services must be stopped.

- QMS Call Recording Service
- QMS Data Service
- Net.Msmq Listener Adapter
- Net.Pipe Listener Adapter
- Net.Tcp Listener Adapter
- Net.Tcp Port Sharing Service
- Sysinternals Process Explorer

Stop the services listed above. When the .NET 4.5 installation is complete, restart the services.

- Visual C++ 2012 Redistributable (x 86 version).
Download and install it from <http://www.microsoft.com/en-us/download/details.aspx?id=30679>

Before installing Quality Management 5.3, add the .wrp file type to the Default Website MIME types on the server hosting the Data Service in IIS. To add the MIME type, complete the following steps.

1. In Control Panel, open **Administrative Tools** and open the **Internet Information Service (IIS) Manager**.
2. In IIS Manager expand the tree for the server hosting the Data Service.
3. Navigate to **Sites > Default Web Site**. *The Default Web Site Home page displays.*
4. Double-click the **MIME Types** icon.
5. Click **Add**. *A dialog window displays.*
6. Add a new MIME Type with the by filling in the following fields.
 - In the File Name Extension field type **.wrp**.
 - In the MIME TYPE field type **application/octet-stream**.

To install Windows Server 2012, complete the following steps.

1. In the Server Manager, click **Local Server** from the left-pane.
2. Scroll to the bottom of the middle pane to ROLES AND FEATURES and click **TASKS V**.
3. Select **Add Roles and Features**.
4. Select the **Role-based or feature-based installation** radio button and click **Next**.
5. Select **Features** in the left pane.
6. Expand **User Interfaces and Infrastructure** and select **Desktop Experience**.

To install Windows Server 2008, complete the following steps.

1. In the Server Manager, expand **Features**.
 2. Click **Add Features** and select **Desktop Experience**.
- Windows Desktop Experience

Performing the upgrade

To upgrade Quality Management, log in as a system administrator. Perform the upgrade on the Primary Server – which runs the Data Service and Quality Management Client – and any Call Recording Servers.

Upgrading the Primary Server

To upgrade the Primary Server, complete the following steps.

1. Create a complete system backup of **all** QMS servers, including the file system, registry, and SQL server.
2. In Control Panel, open **Administrative Tools**, run the **Services** utility, and stop the following services:
 - CallRex Data Service
 - CallRex Call Recording ServiceVerify that the services stop using the task manager.
3. Unzip the upgrade archive to the local file system. Locate the CallrexUpgrade executable in the root folder, right click it and select to **Run as administrator**.
4. Select the **I have read and accept the above terms and conditions** checkbox.
5. Ensure that the **Perform database backup** checkbox is selected. If you want to skip the DB Backup portion of the upgrade, deselect this option.
6. Review and accept the licensing terms and conditions and click **Continue**.
7. The upgrade utility automates several steps and reports on the success or failure of each. The utility does the following:
 - Determines which Quality Management Services are installed locally.
 - Checks the configured PBX type for an unsupported PBX.
 - Stops any running Quality Management Services, and waits 20 seconds.
 - Copies upgrade files related to the services from the archive location to the Quality Management Suite installation folder.
 - Modifies the configuration files for any installed Quality Management services.
 - Copies upgrade files related to the management client from the archive location to the IIS folder. (Only if the Data Service is installed locally)
 - Upgrades the database schema. (Only if the Data Service is installed locally)
 - Backs up the QMS registry configuration and service configuration files.
 - Migrates registry persisted configuration to file based configuration.
 - Deletes registry persisted configuration.
 - Starts the Data Service. (Only if the Data Service is installed locally)
8. Review the upgrade utility output for any reported errors and click **Close** to dismiss the dialog.

Upgrading the Call Recording Servers

To upgrade a Call Recording Server that is separate from the Primary Server follow the same steps detailed in Upgrading the Primary Server, but on the Call Recording Server.

Reference Information

Installing WCF Ria Services Manually



Note

WCF Ria Services should be automatically installed, but if it is not the information provided in this section provides the necessary steps to do so.

To install WCF Ria Services, complete the following steps.

1. Download it from <http://www.microsoft.com/en-us/download/confirmation.aspx?id=28357>.
2. Click the button to download the RiaServices.msi file. When the File Download dialog opens, click **Save** and specify the path where the file should be saved.
3. After the download completes, open a command window and navigate to the folder where the RiaServices.msi download was saved.
4. At the command prompt, type the following **msiexec /i RIAServices.msi SERVER=true** and press **Enter**.

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