



Installing and Upgrading Personal Assistant

This chapter contains the following sections:

- [Task List for Installing Personal Assistant on a New System, page 2-1](#)
- [Installing Personal Assistant Software, page 2-2](#)
- [Task List for Upgrading from Personal Assistant Version 1.3\(x\), page 2-5](#)
- [Setting Up Active Directory as the Corporate Directory for Personal Assistant, page 2-6](#)
- [Disabling McAfee NetShield Services, page 2-8](#)
- [Disabling Cisco Security Agent for Cisco Personal Assistant, page 2-8](#)
- [Re-Enabling Cisco Security Agent for Cisco Personal Assistant, page 2-9](#)
- [Installing the Enhanced Text to Speech Server, page 2-9](#)
- [Refreshing the System—Updating User Information from the Corporate Directory, page 2-10](#)

Task List for Installing Personal Assistant on a New System

Personal Assistant consists of three components that you can install separately or together on one system: the Personal Assistant web interfaces for end users and administrators; the Personal Assistant server; and the speech recognition server.

Although you configure some Personal Assistant settings during installation, you do most of the configuration after installation by using the Personal Assistant administration interface.

Use the following task list to install Personal Assistant on a system that is not running a previous version of Personal Assistant. If you are upgrading Personal Assistant, see the “[Task List for Upgrading from Personal Assistant Version 1.3\(x\)](#)” section on [page 2-5](#).

1. Before installing Personal Assistant on a new system, review the planning information in [Chapter 1, “Planning for Personal Assistant.”](#) You must have a clear understanding of how many users you need to support and the best configuration of the Personal Assistant components for your requirements, as you will need this information to make decisions during the installation process.
2. Verify the hardware and software requirements for the Personal Assistant 1.4 system. Refer to the “System Requirements and Supported Software” section of the *Release Notes for Personal Assistant Version 1.4*. The release notes are available at http://www.cisco.com/en/US/products/sw/voicesw/ps2026/prod_release_notes_list.html.
3. Review the system limitations and restrictions on how Personal Assistant can be configured in the network. Refer to the “Personal Assistant Configuration on the Network” section of the *Release Notes for Personal Assistant Version 1.4*.

4. If the system uses Active Directory for the corporate directory, prepare the directory system to work with Personal Assistant. See the [“Setting Up Active Directory as the Corporate Directory for Personal Assistant”](#) section on page 2-6.
5. If McAfee NetShield is installed on the Personal Assistant server, disable the virus-scanning services so that they do not interfere with the installation program. See the [“Disabling McAfee NetShield Services”](#) section on page 2-8. Otherwise, skip to Task 6.
6. If Cisco Security Agent for Cisco Personal Assistant is installed on the Personal Assistant server, disable the Cisco Security Agent service so that it does not interfere with the installation program. See the [“Disabling Cisco Security Agent for Cisco Personal Assistant”](#) section on page 2-8. Otherwise, skip to Task 7.
7. Install the Personal Assistant server, speech recognition server, and user and administrative interfaces. See the [“Installing Personal Assistant Software”](#) section on page 2-2.
8. Install the enhanced Text to Speech server, if applicable. See the [“Installing the Enhanced Text to Speech Server”](#) section on page 2-9.
9. Configure Cisco CallManager. See Chapter 3, [“Configuring Cisco CallManager for Personal Assistant.”](#)
10. Configure Personal Assistant. See Chapter 4, [“Configuring Personal Assistant.”](#)
11. Load user information from the corporate directory. See the [“Refreshing the System—Updating User Information from the Corporate Directory”](#) section on page 2-10.
12. When the refresh has completed, re-enable the Cisco Security Agent service, if applicable. See the [“Re-Enabling Cisco Security Agent for Cisco Personal Assistant”](#) section on page 2-9.
13. When the refresh has completed, if applicable, re-enable the McAfee NetShield services that you disabled in Task 5. Refer to the virus-scanning software documentation for information about re-enabling the services.

Installing Personal Assistant Software

If you are integrating Personal Assistant with Cisco Unity or Microsoft Exchange in a Windows 2000 domain, you cannot use the same product code to install both Windows 2000 and Personal Assistant. You must first install Windows 2000, restart the system, and join the domain before proceeding with the Personal Assistant installation.

To Install Personal Assistant Software

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- Step 1** Log on to the computer from which you are running the Personal Assistant Installation program as a local administrator.
 - Step 2** Insert the Personal Assistant Installation CD into the CD-ROM drive. The Personal Assistant installation program automatically launches.
 - Step 3** If prompted, enter the product key.
 - Step 4** Click **OK**. The welcome window opens.
 - Step 5** Click **Next**. The End-User License Agreement window opens.
 - Step 6** Read the agreement, and click **I Agree** to accept the terms and continue. Or, click **Exit** to cancel the installation. The Cisco Personal Assistant Components window opens.

- Step 7** Do the following substeps on the Cisco Personal Assistant Components window:
- a. Choose the Personal Assistant components to install:
 - Cisco Personal Assistant Server—Manages the interaction between the user and Cisco Personal Assistant, processes call routing and dial rules, and manages the overall configuration of the Cisco Personal Assistant system.
 - Cisco Personal Assistant Speech Recognition Server—Processes speech commands.
 - Cisco Personal Assistant Web Administration—Is used to administer and access Personal Assistant by using a web browser.

During installation, the selected components install on the same system. If you want to install components on different systems, choose only those components you want installed together at this time. You must perform subsequent installations to install the remaining components on different systems.
 - b. To install Personal Assistant on an Windows 2000 Domain, select **Use a Domain Account** and enter the following:
 - Account—Domain administrator account.
 - Password—Password for the domain administrator account.
 - Domain—Domain in which you are installing Cisco Personal Assistant.

If you are installing multiple Personal Assistant servers, you must install them in the same Windows 2000 domain.

If you chose to install only the Personal Assistant Speech Recognition Server, skip to [Step 12](#). Otherwise, continue with [Step 8](#).

- Step 8** Click **Next**. The Cisco Personal Assistant Locales window opens.
- Step 9** Check the check boxes for the desired locales.
- Step 10** Click **Next**. The Cisco CallManager Database Location window opens.
- Step 11** On the Cisco CallManager Database Location window, enter the settings from the Cisco CallManager publisher:
- Host name—The DNS name or IP address of the Cisco CallManager publisher.
 - Windows 2000 username and password—The settings on the server that is the Cisco CallManager publisher.
 - SQL Server username and password—The SQL server used by Cisco CallManager publisher. Enter the information only if you are installing Personal Assistant version 1.4(2) or earlier. Note that for Personal Assistant version 1.4(3) or later, the installation program does not display the SQL Server username and password fields.

These settings must match those on the Cisco CallManager publisher server. For example, if you do not have a password set for Windows 2000 on that system, do not enter it here. However, a user name is required.



Note You must specify the same Cisco CallManager publisher for all of the Personal Assistant and speech-recognition servers in the same Personal Assistant cluster.

You must be able to access the Cisco CallManager system from the computer on which you are installing Personal Assistant. When you click Next, the installer verifies connectivity to the Cisco CallManager system. If it cannot reach Cisco CallManager, it generates an error and the installation will not continue.

- Step 12** Click **Next**. The Ready to Install Cisco Personal Assistant window opens.
- If an error message appears saying, “Connected successfully using the information supplied, but could not find a Call Manager database on the server. Please check the information and retry,” exit the installation program and do the following procedure “[To Manually Create a System Data Source for the Cisco CallManager Database \(Personal Assistant 1.4\(2\) and Earlier\)](#).” When you are done creating the data source, repeat this procedure.
- Step 13** Click **Next**.
- The Personal Assistant components you selected are installed. Installation takes approximately 10 to 15 minutes to complete. Once complete, the Cisco Product Activation window opens.
- Step 14** Click **Yes** to restart the computer. Click **No** to continue installing other applications. Note that you must restart before using Personal Assistant.

If you are installing Personal Assistant version 1.4(2) or 1.4(1) and if the installation of Personal Assistant reports errors about connecting to the Cisco CallManager database, do the following procedure to create a system data source in the ODBC Data Source Administrator to use TCP/IP to connect to the Cisco CallManager database. Do the procedure on each Personal Assistant server. Otherwise, skip the procedure.

To Manually Create a System Data Source for the Cisco CallManager Database (Personal Assistant 1.4(2) and Earlier)

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- Step 1** On the Windows Start menu, click **Settings > Control Panel > Administrative Tools > Data Sources (ODBC)**.
- Step 2** Click the **System DSN** tab, and click **Add**.
- Step 3** In the Create New Data Source dialog box, click **SQL Server** from the list, and click **Finish**.
- Step 4** In the Create a New Data Source to SQL Server dialog box, enter a name (for example, PACCMDB) and a description for the data source in the applicable fields.
- Step 5** In the Server list, click the hostname or IP address of the Cisco CallManager publisher server.



Note The ODBC sources on all servers in the Personal Assistant cluster must use the same publisher database.

- Step 6** Click **Next**.
- Step 7** Click **Client Configuration**.
- Step 8** In the Add Network Library Configuration dialog box, confirm that the correct Cisco CallManager hostname or IP address appear in the Server Alias and Server Name fields.
- Step 9** Under Network Libraries, click **TCP/IP**.
- Step 10** Update the information in the Port Number field, if applicable.
- Step 11** Click **OK**.
- Step 12** Click **With SQL Server Authentication Using a Login ID and Password Entered by the User**, then enter the Login ID and Password for the Cisco CallManager publisher database.
- Step 13** Click **Next** until you get to the last page, then Click **Finish**.
- Step 14** In the dialog box that appears, click **Test Data Source**.

Confirm that the test completes successfully.

Step 15 Click **OK** to complete the configuration.

Task List for Upgrading from Personal Assistant Version 1.3(x)

Use the following task list to upgrade Cisco Personal Assistant on a system that is currently running a 1.3(x) version of the software. The task list assumes the currently-installed Personal Assistant component was installed correctly and is functioning.

Personal Assistant will be out of service while the system is upgraded. Plan to upgrade the product on a day and time where the elimination of the Personal Assistant service will have the least impact.

If you are installing Personal Assistant on a server that does not have a version already installed, see the “[Task List for Installing Personal Assistant on a New System](#)” section on page 2-1.



Caution

Do not upgrade from Personal Assistant version 1.2(x) directly to version 1.4. For this upgrade, you must first upgrade to Personal Assistant version 1.3. Refer to the *Cisco Personal Assistant Installation and Administration Guide* for version 1.3 for instructions.

Upgrading from Personal Assistant version 1.1(x) is not supported.

1. If McAfee NetShield is installed on the Personal Assistant server, disable the virus-scanning services so that they do not interfere with the installation program. See the “[Disabling McAfee NetShield Services](#)” section on page 2-8. Otherwise, skip to Task 2.
2. If Cisco Security Agent for Cisco Personal Assistant is installed on the Personal Assistant server, disable the Cisco Security Agent service so that it does not interfere with the installation program. See the “[Disabling Cisco Security Agent for Cisco Personal Assistant](#)” section on page 2-8. Otherwise, skip to Task 3.
3. Upgrade Cisco CallManager to the required version. See [Table 1-1 on page 1-6](#) for the required version, and refer to the Cisco CallManager documentation for upgrade instructions.
4. Stop all Personal Assistant components to remove Personal Assistant services from the telephony network. See the “[Stopping Personal Assistant Components](#)” section on page 2-6.
5. Install the Personal Assistant server, speech recognition server, and user and administrative interfaces. See the “[Installing Personal Assistant Software](#)” section on page 2-2.
6. If you are upgrading to the enhanced Text to Speech server, install the enhanced server. See the “[Installing the Enhanced Text to Speech Server](#)” section on page 2-9.
7. Reload user information from the corporate directory. See the “[Refreshing the System—Updating User Information from the Corporate Directory](#)” section on page 2-10.
8. When the refresh has completed, re-enable the Cisco Security Agent service, if applicable. See the “[Re-Enabling Cisco Security Agent for Cisco Personal Assistant](#)” section on page 2-9.
9. When the refresh has completed, if applicable, re-enable the McAfee NetShield services that you disabled in Task 1. Refer to the virus-scanning software documentation for information about re-enabling the services.
10. If you are upgrading to the enhanced Text to Speech server, configure the Text to Speech. See the “[Configuring Enhanced Text to Speech](#)” section on page 4-14.

11. If Cisco CallManager is configured in a cluster, specify the Cisco CallManager internal directory configuration. See the “[Specifying the Cisco CallManager Internal Directory Configuration \(Personal Assistant Version 1.4\(3\) or Later\)](#)” section on page 4-10.

Stopping Personal Assistant Components

To Stop Personal Assistant Components

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- Step 1** Log on to the computer from which you are running the Personal Assistant upgrade program as a local administrator.
 - Step 2** In the Personal Assistant administration interface, select **System > Control Center**. Personal Assistant opens the Control Center page.
 - Step 3** Click **Stop All** in each of the three sections of the page to stop all Personal Assistant Servers, license managers, and speech recognition servers.
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Setting Up Active Directory as the Corporate Directory for Personal Assistant

Do the following two subsections, if applicable.

Verifying That the Global Catalog Schema Includes Personal Assistant Attributes

If you are using Active Directory for the corporate directory, and if you have users defined in multiple domains, you must use the global catalog server when you configure the corporate directory.

If you use the global catalog server, the global catalog schema must include the attributes specific to Personal Assistant, as listed in [Table 2-1](#).

In addition to the attributes listed, if you create directory hierarchies that use other attributes (for example, City=San Jose), ensure that the additional attributes are also included in the schema.

Verify with your Active Directory administrator that the global catalog schema has the applicable attributes.

Table 2-1 Personal Assistant Attributes

Active Directory Attribute Name	Attribute Name in Personal Assistant
sAMAccountName	Unique Attribute
givenName	First Name
sn	Last Name
alias	Nick Name
telephoneNumber	Work Phone

Table 2-1 *Personal Assistant Attributes (continued)*

Active Directory Attribute Name	Attribute Name in Personal Assistant
mobile	Cell Phone
homeNumber	Home Phone
pager	Pager Address
mail	E-mail Address

Using an LDIF File

LDIF is a standard format used to import and export data from an LDAP directory. You can set up Personal Assistant to read from an LDIF file to obtain information from the corporate directory when the system refreshes and when it restarts. By default, Personal Assistant uses an LDAP query, which can result in a large amount of network traffic, depending on the size of the data and the complexity of the system. Instead of having each server in a multiple Personal Assistant cluster run a large, resource-intensive LDAP query, you can set up an LDIF file at a shared location and configure each server to read from it.

Note that Personal Assistant will still use LDAP queries for functions such as name-dialing, searching the corporate directory to copy users to the address book, and so on.

To use an LDIF file, you first set up the system to generate the LDIF file that includes attributes specific to Personal Assistant. When you later configure the corporate directory, you specify the location of this file. The [“To Configure the Corporate Directory” procedure on page 4-8](#) will alert you when to do this.

[Table 2-2](#) lists the Personal Assistant attributes required in the LDIF file. Note that in addition to the listed fields, if you configured directory hierarchies that use other attributes (for example, City=San Jose), you must include the additional attributes in the file. See the [“Sample LDIF File Creation”](#) section below for an example of how to set up an LDIF file for Personal Assistant.

Table 2-2 *LDIF File Attributes*

LDAP Attribute Name	Attribute Name in Personal Assistant
cn, uid, or sAMAccountName	Unique Attribute
givenName	First Name
sn	Last Name
alias	Nick Name
telephoneNumber	Work Phone
mobile	Cell Phone
homeNumber	Home Phone
pager	Pager Address
mail	E-mail Address

Sample LDIF File Creation

For example, assume that the directory is Active Directory and that you are setting up the LDIF file Paldifdata.ldif in the directory C:/Ldif. To create the file, run the ldifde command, as follows:

```
ldifde -s global-catalog-server -t 3268 -d "dc=sample,dc=com" -r "(ObjectCategory=Person)" -p
SubTree -l "givenName,sn,alias,homePhone,telephoneNumber,mobile,pager,mail" -n -f
"C:/Ldif/Paldifdata.ldif"
```

The example produces the following output:

```
dn: CN=jdoe,CN=users,CN=sample,CN=com
changetype: add
mail: jdoe@sample.com
givenName: John
sn: Doe
telephoneNumber: 12345
```

Disabling McAfee NetShield Services

If McAfee NetShield is installed on the Personal Assistant server, the virus-scan services must be disabled before you run the Personal Assistant installation program in order to speed up the installation or upgrade process. (The task list alerts you when to re-enable the services.)

To Disable McAfee NetShield Services

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- Step 1** On the Windows Start menu, click **Programs > Administrative Tools > Services**.
- Step 2** In the right pane, double-click each of the services listed below. For each service, on the General tab, click **Stop**, click **Disabled** in the Startup Type list, and then click **OK**.
- Network Associates Alert Manager
 - Network Associates McShield
 - Network Associates Task Manager
- Step 3** Close the Services MMC.
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Disabling Cisco Security Agent for Cisco Personal Assistant

To Disable the Cisco Security Agent Service

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- Step 1** On the Windows Start menu, click **Programs > Administrative Tools > Services**.
- Step 2** In the right pane, double-click **Cisco Security Agent**.
- Step 3** Click the General tab, and click **Stop**.
- Step 4** In the Startup Type list, click **Disabled**, and click **OK**.
- Step 5** Click **OK** to close the Cisco Security Agent Properties dialog box.

Step 6 Close the Services MMC.

Re-Enabling Cisco Security Agent for Cisco Personal Assistant

To Re-Enable the Cisco Security Agent Service

- Step 1** On the Windows Start menu, click **Programs > Administrative Tools > Services**.
- Step 2** In the right pane, double-click **Cisco Security Agent**.
- Step 3** On the General tab, in the Startup Type list, click **Automatic**.
- Step 4** Click **Start**.
- Step 5** Click **OK** to close the Cisco Security Agent Properties dialog box.
- Step 6** Close the Services MMC.
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Installing the Enhanced Text to Speech Server

The platform requirements for the enhanced Text to Speech server are the same as the requirements for the Personal Assistant server. Refer to the “Hardware Requirements” section of the Release Notes for Personal Assistant Version 1.4. The release notes are available at http://www.cisco.com/en/US/products/sw/voicesw/ps2026/prod_release_notes_list.html.

The enhanced Text to Speech server can be installed on the Personal Assistant server or on a separate server, but not on the Cisco CallManager or Cisco Unity server. The Personal Assistant server must be able to connect to the Text to Speech server. Otherwise enhanced text to speech generation will fail and the default text to speech server will be used instead.

Do the following two procedures, if applicable.

To Install the Enhanced Text to Speech Server and Any Applicable Locale(s)

- Step 1** Log on to the computer from which you are installing the Text to Speech server as a local administrator.
- Step 2** If you are installing the Text to Speech server on the Personal Assistant server, as a best practice, we recommend that you stop one of the Personal Assistant services. Do the following substeps:
- On the Windows Start menu, click **Programs > Administrative Tools > Services**.
 - In the right pane, double-click **PATTSServer**.
 - Click the **General** tab, and click **Stop**. If a message appears saying that the PATTServer service could not be stopped, click **OK**.
 - Close the Services MMC.
- Step 3** Insert the Cisco Personal Assistant Enhanced TTS Server CD1 in the CD-ROM drive.
- If the installation program does not appear, browse to the root directory of the CD, and double-click **Setup.exe**.
- Step 4** Follow the on-screen prompts until you are prompted to select the components to install.

- Step 5** Check the **Enhanced TTS Server** check box.
- Step 6** Check the check box(es) of the locale(s) that you want to install.
- Step 7** Enter a port number between 1024 and 65535 on which to run the TTS server, in the TTS Port Number field, and click **Next**. (The default is 6666.)
- We recommend that you make note of this number. This is the port number that you will enter on the Enhanced TTS Configuration page of the Administration interface.
- Step 8** Continue to follow the on-screen prompts until the setup is complete.
- Step 9** When the setup is complete, click **OK**.
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To install additional locales, do the following procedure.

To Install Additional Enhanced Text to Speech Server Locales

- Step 1** Ensure that you are logged on to the computer from which you are installing the additional enhanced Text to Speech server locales as a local administrator.
- Step 2** If you are installing the additional locales on the Personal Assistant server, as a best practice, we recommend that you stop one of the Personal Assistant services. Do the following substeps:
- On the Windows Start menu, click **Programs > Administrative Tools > Services**.
 - In the right pane, double-click **PATTSServer**.
 - Click the **General** tab, and click **Stop**. If a message appears saying that the PATTServer service could not be stopped, click **OK**.
 - Close the Services MMC.
- Step 3** Insert the Cisco Personal Assistant Enhanced TTS Server CD2 in the CD-ROM drive.
- If the installation program does not appear, browse to the root directory of the CD, and double-click **Setup.exe**.
- Step 4** Follow the on-screen prompts until you are prompted to select the components to install.
- Step 5** Check the check boxes for the applicable locales, and click **Next**.
- Step 6** Continue to follow the on-screen prompts until the setup is complete.
- Step 7** When the setup is complete, click **OK**.
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Refreshing the System—Updating User Information from the Corporate Directory

Do the following procedure to have Personal Assistant load speech recognition grammars and user information from the corporate directory.

Ensure that the virus-scanning services are disabled during the first system refresh.

To Refresh the System

- Step 1** Log on to the Personal Assistant administration interface.
- Step 2** Select **System > Speech Services**. The Speech Services Configuration page appears.
- Step 3** Click **Refresh Now**.
- Note that the refresh can take up to an hour, depending on the size of the corporate directory, the number of locales installed, and the number of directory hierarchies configured.
- Step 4** After the refresh has completed, verify that the refresh was successful by clicking **Last Refresh Details**.
- Step 5** If the refresh was not successful, the Personal Assistant services may not run and some Personal Assistant features may be unavailable. Do the following substeps:
- a. On the Speech Services Configuration page, verify that the entry in the License Key field is valid. If the Number of Licenses field does not display the correct number speech ports and available locales, re-enter the license key, and click **Save** to update the information.
 - b. Verify the DNS names or IP addresses in the Speech Recognition Server Hosts and the Speech Recognition License Manager Hosts lists. If any information is incorrect, make the applicable modifications, and click **Save** to update the information.
 - c. Navigate to the Control Center page and verify that the license manager is running. If the license manager has not started, click the **Start** button on the same line as the server name.
 - d. Return to the Speech Services Configuration page and click **Refresh Now**.
 - e. After the refresh has completed, verify that the refresh was successful by clicking **Last Refresh Details**.
- If the refresh was not successful, contact Cisco TAC to resolve the problem before proceeding.
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