



# Install

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## Introduction

In this section you will complete the two major upgrade tasks using the following checklists:

Checklist for Upgrading the First Cisco Unified CM Node

Checklist for Upgrading Subsequent Nodes in the Cluster

### Before You Begin

You should have completed the Pre-Upgrade Checklist.

### When You Are Done

You will have completed the Checklist for Upgrading the First Cisco Unified CM Node and Checklist for Upgrading Subsequent Nodes in the Cluster.

Go on to the Post-Upgrade Checklist.

## Checklist for Upgrading the First Cisco Unified CM Node

To upgrade and migrate data from a publisher server, perform the following tasks.

	Task	Task Details (Links) and Notes
<input type="checkbox"/>	Step 1 Verify that you have completed all pre-upgrade tasks.	See Pre-Upgrade Checklist.
<input type="checkbox"/>	Step 2 Familiarize yourself with navigation within the installation wizard.	See Navigating Within the Installation Wizard.
<input type="checkbox"/>	Step 3 Know which installation options to choose.	See Selecting an Installation Option.
	Step 4 Assign host name or IP address to the server.	See Assigning the Host Name or IP Address to the Server.
<input type="checkbox"/>	Step 5 Configure the hardware with the hardware configuration disc.	See Configuring the Hardware.

	Task	Task Details (Links) and Notes
<input type="checkbox"/>	Step 6 Install the new operating system on the first node.	See Installing the New OS and Application on the First Node.
<input type="checkbox"/>	Step 7 Obtain the necessary licensing details from the system and register for your license file on Cisco.com. Once you receive the license file and install it on your system, you may then make changes to the administration.  <b>Note</b> Prior to obtaining the license information the system will run but administration changes can not be made.	See the Licensing chapter in <i>Cisco Unified CallManager System Guide, Release 5.0(4)</i> .

## Navigating Within the Installation Wizard

For instructions on how to navigate within the installation wizard, see Table 3-1.

**Table 3-1 Installation Wizard Navigation**

To Do This	Press
Move to the next field	<b>Tab</b>
Move to the previous field	<b>Alt-Tab</b>
Choose an option	<b>Spacebar</b>
Scroll up or down in a list	Up or down arrow
Go to the previous window	Space bar to choose <b>Back</b> (when available)
Get help information on a window	Space bar to choose <b>Help</b> (when available)

## Selecting an Installation Option

After the platform software installation starts, you will be asked to select one of the options that Table 3-2 lists.

**Table 3-2 Installation Options**

Installation Options	Description
Basic Install	This option represents the basic installation and does not use any imported data.

**Table 3-2 Installation Options (continued)**

Installation Options	Description
Upgrade During Install	<p>This option allows you to upgrade the preinstall software with the latest service release prior to configuring your system. You can also choose Upgrade During Install followed by the a Windows Upgrade and perform both during the installation process.</p> <p><b>Note</b> You must have the software image available on DVD or on a remote server prior to choosing this option.</p>
Windows Upgrade	<p>This option allows you to import the TAR file that the DMA tool produced while upgrading an existing Cisco Unified Communication Manager server.</p> <p><b>Note</b> If you choose to upgrade your server by using this option, you will need to provide the TAR file that contains the migrated data from the DMA tool on tape or a remote drive.</p>

## Assigning the Host Name or IP Address to the Server

In this task you assign the Host Name/IP address to the 5.1(1) server. In 4.x releases, the Host Name/IP Address field (also known as Servername) on the publisher server Server Configuration Settings window contains one of the following types of values:

- If DNS is enabled, it identifies the host name.
- If DNS is not enabled, it contains the IP address of the server.

To access Server Configuration Settings, navigate to **System > Server**.

The Data Migration Assistant (DMA) file that is used to migrate data from 4.x to 5.1(1) releases includes the Host Name/IP Address value. When you migrate data by using DMA, the Host Name/IP Address (Servername) for the publisher server gets imported into the 5.1(1) database as follows:

- If the Host Name/IP Address (Servername) was a Host Name, the installation program compares this Servername to the provisioned Hostname for the 5.1(1) server (either through static provisioning or DNS/DHCP). If a mismatch exists, the installation program does the following actions:
  - Uses the provisioned Hostname as the Host Name/IP address for the 5.x server, overriding the servername in the DMA file.
  - Notifies you about the mismatch and its resolution.
  - Prompts you to proceed or cancel the installation.
- If the Host Name/IP Address (Servername) was an IP address, the installation program compares this Servername to the provisioned IP Address for the 5.x server (either through static provisioning or DNS/DHCP). If a mismatch exists, the installation program does the following actions:
  - Uses the provisioned IP Address as the Servername for the 5.x server, overriding the servername in the DMA file.
  - Notifies you about the mismatch and its resolution.
  - Prompts you to proceed or cancel the installation.

This feature allows you to import your 4.x data to a 5.1(1) server without having to preserve the IP Address or Host Name. The IP Address and/or Host name of the 5.1(1) server can differ from the 4.x servername.

**Caution**

Do not assign a hostname or IP address to the upgraded server that is already assigned to another node in the cluster. Doing so causes the cluster upgrade to fail.

## Configuring the Hardware

As a part of software installation, the system installer configures the system BIOS and RAID settings for the new operating system and Cisco Unified Communication Manager application. See Table 3-3 for the BIOS settings and Table 3-4 for the RAID settings that are set up during installation.

**Note**

If the hardware configuration process fails during installation, you can use boot-time utilities on both the IBM and HP servers to manually configure the RAID and BIOS settings, as shown in Table 3-3 and Table 3-4.

**Table 3-3 BIOS Configuration Settings for HP and IBM Servers**

HP Servers	IBM Servers
OS Selection: Linux (not applicable on newer models)	OS Selection: Not applicable
Boot order: CD, C:, Floppy	Boot order: CD, C:, Floppy
Post F1 prompt: Delayed	Post F1 prompt: Delayed
Hyperthreading: Enabled	Hyperthreading: Enabled

**Table 3-4 RAID Settings**

MCS 7825 Servers (HP and IBM)	MCS 7835 Servers (HP and IBM)	MCS 7845 Servers (HP and IBM)
Software RAID	Logical drives: 1	Logical drives: 2
Software RAID	RAID type: 1(1+0)	RAID type: 1(1+0)
<b>Note</b> For the HP 7825H1 and the IBM 7825I1, SATA RAID gets enabled, and the RAID type specifies 1(1+0), with one logical drive.		

## Installing the New OS and Application on the First Node

Use this procedure to begin installing the operating system and Cisco Unified Communication Manager application on the first Cisco Unified Communication Manager node:

**Caution**

Before beginning this procedure, ensure that you have backed up the data on your current Windows-based version of Cisco Unified Communication Manager. For more information, see the *Cisco Unified Communications Backup and Restore System Administration Guide* for your version of BARS.

**Procedure**

**Step 1** Insert the installation DVD into the tray and restart the server, so it boots from the DVD. After the server completes the boot sequence, the Media Check window displays.



**Note** If you have a new server with pre installed Cisco Unified Communication Manager, you do not need to install from a DVD. Go directly to the “If You Choose Skip” procedure on page 3-6.

**Step 2** Verify that the checksum that displays on the Media Check matches the checksum for the release on Cisco.com.

When the media check completes, the Media Check Result window displays.

**Step 3** If the Media Check Result displays Pass, choose **OK** to continue the installation.

If the media fails the Media Check, either download another copy from Cisco.com or obtain another disc directly from Cisco Systems.

- First, the installation process checks for the correct drivers, and you may see the following warning:

Drivers not found, do you want to install manually?

To continue the installation, choose **Yes**.

- The installation next checks to see whether you have a supported hardware platform. If your server does not meet the exact hardware requirements, the installation process fails with a critical error. If you think this is not correct, capture the error and report it to Cisco support.
- The installation process then verifies RAID configuration and BIOS settings. If the installation process makes any changes to your hardware configuration settings, you will get prompted to restart your system.

After the hardware checks complete, the Overwrite Hard Drive window displays.

**Step 4** The **Overwrite Hard Drive** window indicates the current software version on your hard drive, if any, and the version on the DVD. Choose **Yes** to continue with the installation or **No** to cancel.

**Caution**

If you choose **Yes** on the **Overwrite Hard Drive** window, all existing data on your hard drive gets overwritten and destroyed.

The Platform Installation Wizard window displays.

**Step 5** To configure the platform now, choose **Proceed**. If you want to configure the platform later, choose **Skip**.

- If you want to install and configure the software at this time, choose **Proceed** and skip to the “If You Choose Proceed” section on page 3-6.
- If you want to install the software now and configure it later, choose **Skip** and continue with the “If You Choose Skip” section on page 3-6.

**If You Choose Skip**

Start here if you have a server that has Cisco Unified Communication Manager pre installed or if you chose **Skip** on Platform Installation Wizard window.

- Step 6** After the system restarts, the Preexisting Installation Configuration window displays. If you have configuration information on a USB drive or on a diskette, insert it now.



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**Note** If you have a file that the Data Migration Assistant created, see the *Data Migration Assistant User Guide* for more information.

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- Step 7** To continue, choose **OK**.  
The Platform Installation Wizard window displays.

- Step 8** To continue with the installation, choose **Proceed**.  
The Upgrade During Install window displays. Continue with the “If You Choose Proceed” section on page 3-6.

**If You Choose Proceed**

- Step 9** Choose the type of installation to perform by doing the following steps. See Table 3-2 for more information on installation options:
- a. In the Upgrade During Install window, choose one of the options:
    - To upgrade to a later Service Release of the software during installation, choose **Yes**. Continue with the “Upgrade During Install” section on page 3-6.
    - To skip this step, choose **No**.
    - To return to the previous window, choose **Back**.
  - b. In the Windows Upgrade window, choose **Yes**. Continue with the “Windows Upgrade” section on page 3-8.



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**Note** To perform a basic installation, that is, to install the application without importing Windows data, see *Installing Cisco Unified Communication Manager*.

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**Upgrade During Install**

If you chose Upgrade During Install, the installation wizard installs the software version on the DVD first and then restarts the system. You then get prompted to enter certain network configuration parameter values and the location of the upgrade file.

- Step 10** After the system restarts, the Platform Installation Wizard window displays. To continue the installation, choose **Proceed**.

The Upgrade During Install window displays.

- Step 11** Choose **Yes**.  
The Install Upgrade Retrieval Mechanism Configuration window displays.

- Step 12** Choose the upgrade retrieval mechanism to use to retrieve the upgrade file:
- **SFTP**—Retrieves the upgrade file from a remote server by using the Secure File Transfer Protocol (SFTP). Skip to the “Upgrade From a Remote Server” section on page 3-7.
  - **FTP**—Retrieves the upgrade file from a remote server by using File Transfer Protocol (FTP). Skip to the “Upgrade From a Remote Server” section on page 3-7.

- **LOCAL**—Retrieves the upgrade file from a local CD or DVD. Continue with the “Upgrade From a Local Disc” section on page 3-7.

### Upgrade From a Local Disc

Before you can upgrade from a local drive, you must download the appropriate patch file from Cisco.com and copy the file to a CD or DVD. Because of the size of the patch files, you will need to copy it to a DVD in most cases.

The patch-file name has the following format:

```
cisco-ipt-k9-patchX.X.X.X-X.tar.gz.sgn
```

Where X.X.X.X-X represents the release and build number



**Note** Do not rename the patch file before you install it because the system will not recognize it as a valid file.

- Step 13** When the Local Patch Configuration window displays, enter the patch directory and patch name, if required, and choose **OK**.



**Note** You only need to enter the patch directory when the patch is not stored in the root directory of the CD or DVD.

The Install Upgrade Patch Selection Validation window displays.

- Step 14** The window displays the patch file that is available on the CD or DVD. To update the system with this patch, choose **Continue**.

### Upgrade From a Remote Server

If you chose to upgrade through an FTP or SFTP connection to a remote server, you must first configure the network settings.

The Auto Negotiation Configuration window displays.

- Step 15** The installation process allows you to automatically set the speed and duplex settings of the Ethernet network interface card (NIC) by using automatic negotiation. You can change this setting after installation,
- To enable automatic negotiation, choose **Yes**. The DHCP Configuration window displays.



**Note** To use this option, your hub or Ethernet switch must support automatic negotiation.

- To disable automatic negotiation, choose **No**. The NIC Speed and Duplex Configuration window displays.

- Step 16** If you chose to disable automatic negotiation, manually choose the appropriate NIC Speed and Duplex settings now and choose **OK** to continue.

The DHCP Configuration window displays.

- Step 17** For network configuration, you can choose to either set up static network IP addresses for the node and gateway or to use Dynamic Host Configuration Protocol (DHCP).

- If you have a DHCP server that is configured in your network and want to use DHCP, choose **Yes**. The system restarts and checks for network connectivity. Skip to the “Retrieving the Remote Patch” section on page 3-8.
- If you want to configure static IP addresses for the node, choose **No**. The Static Network Configuration window displays.

**Step 18** If you chose not to use DHCP, enter your static network configuration values and choose **OK**. See Table 2-2 for field descriptions.

The DNS Client Configuration window displays.

**Step 19** To enable DNS, choose **Yes**, enter your DNS client information, and choose **OK**. See Table 2-2 for field descriptions.

After the system configures the network and checks for connectivity, the Remote Patch Configuration window displays.

#### Retrieving the Remote Patch

**Step 20** Enter the location and login information for the remote file server. See Table 2-2 for field descriptions. After restarting the network, the system connects to the remote server and retrieves a list of available upgrade patches.

If the upgrade file is located on a Linux or Unix server, you must enter a forward slash at the beginning of the directory path. For example, if the upgrade file is in the patches directory, you must enter `/patches`. If the upgrade file is located on a Windows server, check with your system administrator for the correct directory path.

The Install Upgrade Patch Selection window displays.

**Step 21** Choose the upgrade patch to install. The system downloads, unpacks, and installs the patch and then restarts the system so it is running the upgraded software version.

After the system restarts, the Preexisting Configuration Information window displays.

#### Using Preexisting Configuration Information

**Step 22** If you have preexisting configuration information that is stored on a floppy disc or a USB key, insert the disc or the USB key now and choose **Continue**. The installation wizard will read the configuration information during the installation process.

The Platform Installation Wizard window displays.

**Step 23** To continue with the Platform Installation Wizard, choose **Proceed**.

**Step 24** To configure the platform now, choose **Proceed**.

**Step 25** In the Upgrade During Install window, choose **No**.

**Step 26** In the Windows Upgrade window, choose **Yes**. Continue with the “Windows Upgrade” section on page 3-8.

#### Windows Upgrade



When you choose Windows Upgrade, the installation wizard prompts you for the location of the preexisting Windows configuration information that the Data Migration Assistant (DMA) tool created. See the *Data Migration Assistant User Guide* for more information on the DMA tool.

**Step 27** In the Windows Upgrade window, choose **Yes**.

The Timezone Configuration window displays.

**Step 28** Choose the appropriate time zone for the server and then choose **OK**.

The Auto Negotiation Configuration window displays.

- Step 29** The installation process allows you to automatically set the speed and duplex settings of the Ethernet network interface card (NIC) by using automatic negotiation. You can change this setting after installation.
- To enable automatic negotiation, choose **Yes**. The DHCP Configuration window displays.
-  **Note** To use this option, your hub or Ethernet switch must support automatic negotiation.
- To disable automatic negotiation, choose **No**. The NIC Speed and Duplex Configuration window displays.
- Step 30** If you chose to disable automatic negotiation, manually choose the appropriate NIC Speed and Duplex settings now and choose **OK** to continue.
- The DHCP Configuration window displays.
- Step 31** For network configuration, you can choose to either set up static network IP addresses for the node and gateway or to use Dynamic Host Configuration Protocol (DHCP).
- If you have a DHCP server that is configured in your network and want to use DHCP, choose **Yes**. The system restarts and checks for network connectivity. The Administrator Login Configuration window displays.
  - If you want to configure static IP addresses for the node, choose **No**. The Static Network Configuration window displays.
- Step 32** If you chose not to use DHCP, enter your static network configuration values and choose **OK**. See Table 2-2 for field descriptions.
- The DNS Client Configuration window displays.
- Step 33** To enable DNS, choose **Yes**, enter your DNS client information, and choose **OK**. See Table 2-2 for field descriptions.
- The Administrator Login Configuration window displays.
- Step 34** Enter your administrator login and password from Table 2-1 on page 2-4.
- The Certificate Signing Request Information window displays.
- Step 35** Enter your certificate signing request information from Table 2-1 on page 2-4 and choose **OK**.
- The First Node Configuration window displays.
- Step 36** You must configure this node as the first node in the cluster. To continue, choose **Yes**.
- The Network Time Protocol Client Configuration window displays.
-  **Note** Cisco recommends that you use an external NTP server to ensure accurate system time on the first node. The external NTP server must be stratum 9 or higher (meaning stratum 1-9). Subsequent nodes in the cluster will get their time from the first node.
- Step 37** Choose whether you want to configure an external NTP server or manually configure the system time.
- To set up an external NTP server, choose **Yes** and enter the IP address, NTP server name, or NTP server pool name for at least one NTP server. You can configure up to five NTP servers, and Cisco recommends that you use at least three. To continue with the installation, choose **Proceed**.

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**Note** If the Test button displays, you can choose **Test** to check whether the NTP servers that you entered are accessible.

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The system contacts an NTP server and automatically sets the time on the hardware clock.

- To manually configure the system time, choose **No** and enter the appropriate date and time to set the hardware clock. Choose **OK** to continue with the installation.

The Database Access Security Configuration window displays.

**Step 38** Enter the Database Access Security password from Table 2-1 on page 2-4.

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**Note** The Database Access Security password must start with an alphanumeric character, be at least six characters long, and can contain alphanumeric characters, hyphens, and underscores. The system uses this password to authorize communications between nodes, and this password must be the same on all nodes in the cluster.

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The SMTP Host Configuration window displays.

**Step 39** If you want to configure an SMTP server, choose **Yes** and enter the SMTP server name.

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**Note** You must configure an SMTP server to use certain platform features; however, you can also configure an SMTP server later by using the platform GUI or the command line interface.

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The DMA Retrieval Mechanism Configuration window displays.

**Step 40** Choose the mechanism that will be used to retrieve the DMA file:

- **SFTP**—Retrieves the DMA file from a remote server by using Secure File Transfer Protocol (SFTP). The SFTP server must support the following commands: cd, ls, get.
- **FTP**—Retrieves the DMA file from a remote server by using File Transfer Protocol (FTP). The FTP server must support the following commands: cd, bin, dir and get.
- **TAPE**—Retrieves the DMA file from a locally attached tape drive

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**Note** To support retrieval of the DMA file, an FTP server should support the CD, BIN, DIR, and GET commands., and an SFTP server should support CD, LS, GET commands.

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To continue with the installation wizard, choose **OK**.

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**Note** If you choose SFTP or FTP, the DMA Backup Configuration window displays, and you must enter the location of the DMA file and the login information for the remote server. If you choose TAPE, the system reads the DMA file from the locally attached tape.

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**Step 41** If you chose SFTP or FTP, enter the DMA Backup Configuration information and choose **OK**.

If the DMA file is located on a Linux or Unix server, you must enter a forward slash at the beginning of the directory path. For example, if the upgrade file is in the patches directory, you must enter `/patches`. If the DMA file is located on a Windows server, check with your system administrator for the correct directory path.

The Platform Configuration Confirmation window displays.

- Step 42** To continue with the installation, choose **OK** or choose **Back** to modify the platform configuration. When you choose **OK**, the Application User Password Configuration window displays.
- Step 43** Enter the Application User Password from Table 2-1 and confirm the password by entering it again.
- Step 44** Choose **OK**.  
The End User Password/PIN Configuration window displays.
- Step 45** Enter the End User Password and PIN and choose **OK**.  
The end user password must comprise five or more alphanumeric or special characters. The end user PIN must comprise five or more numeric characters.  
The system installs the software, restarts the network, and reads the DMA file that you specified.  
The DMA Retrieval Mechanism Configuration window displays.
- Step 46** To continue, choose **OK**, or to choose a different DMA file, choose **Back**.  
When you choose **OK**, the Installation program assigns a Host Name/ IP Address (Servername) to the 5.1(1) server by comparing the value in the DMA file to the value that is configured on the 5.1(1) system. For more information, refer to the “Assigning the Host Name or IP Address to the Server” section on page 3-3.
- Step 47** If a mismatch exists between these values, you are prompted to Proceed or Cancel. Select **Proceed** to proceed with the installation by using the Host Name/ IP Address (Servername) that the installation program assigned, or choose **Cancel** to cancel the installation.
- Step 48** If no mismatch exists, or you select **Proceed**, the Platform Configuration Confirmation window displays.
- Step 49** To continue, choose **OK**.
- Step 50** When the installation process completes, you get prompted to log in by using the Administrator account and password.
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## What To Do Next

Complete the Checklist for Upgrading Subsequent Nodes in the Cluster. When that is done, complete the post-upgrade tasks listed in the Post-Upgrade Checklist.

## Checklist for Upgrading Subsequent Nodes in the Cluster

To upgrade a subsequent node in the cluster, you must first install the new operating system and the new Cisco Unified Communication Manager application on the first node (Checklist for Upgrading the First Cisco Unified CM Node) and then configure the subsequent node on the first node by using Cisco Unified Communication Manager Administration.

On a subsequent node, you can either install the software version on the disc or retrieve a more recent service release from a remote server. The subsequent nodes will retrieve data from the first node at the end of the installation.

To upgrade a subsequent node in the cluster from Cisco Unified Communication Manager 4.x to Cisco Unified Communication Manager 5.1(1), perform the following steps:

	Task	Task Details (Links) and Notes
<input type="checkbox"/>	Step 1 Using Cisco Unified Communication Manager Administration on the first node, configure the subsequent nodes.	
<input type="checkbox"/>	Step 2 Ensure that the subsequent nodes have network connectivity to the first node.	
<input type="checkbox"/>	Step 3 Install the new operating system and Cisco Unified Communication Manager application from a DVD.	Install the New Operating System and Application on Subsequent Nodes
<input type="checkbox"/>	Step 4 If required, upgrade the software to a later service release.	
<input type="checkbox"/>	Step 5 Configure the platform and Cisco Unified Communication Manager.	



**Note** You must complete a successful migration of data on the first node prior to upgrading the subsequent nodes in the cluster.

## Install the New Operating System and Application on Subsequent Nodes

Use this procedure to begin installing the operating system and Cisco Unified Communication Manager application on a subsequent node.



**Caution** Before beginning this procedure, ensure you have already upgraded the Cisco Unified Communication Manager 4.x publisher server, configured the subsequent node on the Cisco Unified Communication Manager 5.1(1) first node, and have network connectivity to the first node. Failure to meet these conditions can cause the installation to fail.

**Step 1** Insert the installation DVD into the tray and restart the server, so it boots from the DVD. After the server completes the boot sequence, the Media Check window displays.



**Note** If you have a new server that has Cisco Unified Communication Manager pre installed, you do not need to install from a DVD. Go directly to the “If You Choose Skip” procedure on page 3-6.

**Step 2** Verify that the checksum that displays on the Media Check matches the checksum for the release on Cisco.com.

When the media check completes, the Media Check Result window displays.

**Step 3** If the Media Check Result displays Pass, choose **OK** to continue the installation.

If the media fails the Media Check, either download another copy from Cisco.com or obtain another disc directly from Cisco Systems.



**Note** The installation process performs various hardware checks on your server and verifies RAID configuration and BIOS settings. If the installation process makes any changes to your hardware configuration settings, you will get prompted to restart your system.

The Overwrite Hard Drive window displays.

**Step 4** The **Overwrite Hard Drive** window indicates the current software version on your hard drive, if any, and the version on the DVD. Choose **Yes** to continue with the installation or **No** to cancel.



**Caution** If you choose **Yes** on the **Overwrite Hard Drive** window, all existing data on your hard drive gets overwritten and destroyed.

The Platform Installation Wizard window displays.

**Step 5** To configure the platform now, choose **Proceed**. If you want to configure the platform later, choose **Skip**.

- If you want to install and configure the software at this time, choose **Proceed** and skip to the “If You Choose Proceed” section on page 3-13.
- If you want to install the software now and configure it later, choose **Skip** and continue with the “If You Choose Skip” section on page 3-13.

#### If You Choose Skip

Start here if you have a server that has Cisco Unified Communication Manager pre installed or if you chose **Skip** on Platform Installation Wizard window.

**Step 6** After the system restarts, the Preexisting Installation Configuration window displays. If you have configuration information on a USB drive or on a diskette, insert it now.



**Note** If the system pops up a window that states that it detected new hardware, press any key and then choose **Install** from the next window.

**Step 7** To continue, choose **OK**.

The Platform Installation Wizard window displays.

**Step 8** To continue with the installation, choose **Proceed**.

The Install During Upgrade window displays. Continue with the “If You Choose Proceed” section on page 3-13.

#### If You Choose Proceed

**Step 9** Choose the type of installation to perform by doing the following steps. See Table 3-2 for more information on installation options:

- a. In the Upgrade During Install window, choose one of the options:
  - To upgrade to a later Service Release of the software during installation, choose **Yes**. Continue with the “Upgrade During Install” section on page 3-14.
  - To skip this step, choose **No**.
  - To return to the previous window, choose **Back**.
- b. In the Windows Upgrade window, choose **No**.

- c. In the Basic Install window, choose **Continue** to install the software version on the DVD or configure the pre installed software with the basic installation. Continue with the “Basic Installation” section on page 3-16.

### Upgrade During Install

If you chose Upgrade During Install, the installation wizard installs the software version on the DVD first and then restarts the system. You then get prompted to enter certain network configuration parameter values and the location of the upgrade file.

- Step 10** After the system restarts, the Platform Installation Wizard window displays. To continue the installation, choose **Proceed**.



**Note** If the system pops up a window that states that it detected new hardware, press any key and then choose **Install** from the next window.

The Upgrade During Install window displays.

- Step 11** Choose **Yes**.

The Install Upgrade Retrieval Mechanism Configuration window displays.

- Step 12** Choose the upgrade retrieval mechanism that you want to use to retrieve the upgrade file:

- **SFTP**—Retrieves the upgrade file from a remote server by using the Secure File Transfer Protocol (SFTP). Skip to the “Upgrade From a Remote Server” section on page 3-15.
- **FTP**—Retrieves the upgrade file from a remote server by using File Transfer Protocol (FTP). Skip to the “Upgrade From a Remote Server” section on page 3-15.
- **LOCAL**—Retrieves the upgrade file from a local CD or DVD. Continue with the “Upgrade From a Local Disc” section on page 3-14.

### Upgrade From a Local Disc

Before you can upgrade from a local drive, you must download the appropriate patch file from Cisco.com and copy the file to a CD or DVD. Because of the size of the patch files, you will need to copy it to a DVD in most cases.

The patch-file name has the following format:

```
cisco-ipt-k9-patchX.X.X.X-X.tar.gz.sgn
```

Where X.X.X.X-X represents the release and build number



**Note** Do not rename the patch file before you install it because the system will not recognize it as a valid file.

- Step 13** When the Local Patch Configuration window displays, enter the patch directory and patch name, if required, and choose **OK**.



**Note** You only need to enter the patch directory when the patch is not stored in the root directory of the CD or DVD.

The Install Upgrade Patch Selection Validation window displays.

- Step 14** The window displays the patch file that is available on the CD or DVD. To update the system with this patch, choose **Continue**.

#### Upgrade From a Remote Server

If you chose to upgrade through an FTP or SFTP connection to a remote server, you must first configure the network settings.

The Auto Negotiation Configuration window displays.

- Step 15** The installation process allows you to automatically set the speed and duplex settings of the Ethernet network interface card (NIC) by using automatic negotiation. You can change this setting after installation.
- To enable automatic negotiation, choose **Yes**. The DHCP Configuration window displays.




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**Note** To use this option, your hub or Ethernet switch must support automatic negotiation.

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- To disable automatic negotiation, choose **No**. The NIC Speed and Duplex Configuration window displays.

- Step 16** If you chose to disable automatic negotiation, manually choose the appropriate NIC Speed and Duplex settings now and choose **OK** to continue.

The DHCP Configuration window displays.

- Step 17** For network configuration, you can choose to either set up static network IP addresses for the node and gateway or to use Dynamic Host Configuration Protocol (DHCP).
- If you have a DHCP server that is configured in your network and want to use DHCP, choose **Yes**. The system restarts and checks for network connectivity. Skip to the “Retrieving the Remote Patch” section on page 3-15.
  - If you want to configure static IP addresses for the node, choose **No**. The Static Network Configuration window displays.

- Step 18** If you chose not to use DHCP, enter your static network configuration values and choose **OK**. See Table 2-2 for field descriptions.

The DNS Client Configuration window displays.

- Step 19** To enable DNS, choose **Yes**, enter your DNS client information, and choose **OK**. See Table 2-2 for field descriptions.

After the system configures the network and checks for connectivity, the Remote Patch Configuration window displays.

#### Retrieving the Remote Patch

- Step 20** Enter the location and login information for the remote file server. See Table 2-2 for field descriptions. After restarting the network, the system connects to the remote server and retrieves a list of available upgrade patches.

To support retrieval of the patch file, an FTP server should support the CD, BIN, DIR, and GET commands., and an SFTP server should support CD, LS, GET commands.

If the upgrade file is located on a Linux or Unix server, you must enter a forward slash at the beginning of the directory path. For example, if the upgrade file is in the patches directory, you must enter `/patches`. If the upgrade file is located on a Windows server, check with your system administrator for the correct directory path.

The Install Upgrade Patch Selection window displays.

- Step 21** Choose the upgrade patch that you want to install. The system downloads, unpacks, and installs the patch and then restarts the system, so it is running on the upgraded software version.

After the system restarts, the Preexisting Configuration Information window displays.

#### Using Preexisting Configuration Information

- Step 22** If you have preexisting configuration information that is stored on a floppy disc or a USB key, insert the disc or the USB key now and choose **Continue**. The installation wizard will read the configuration information during the installation process.

The Platform Installation Wizard window displays.

- Step 23** To continue with the Platform Installation Wizard, choose **Proceed**.

The Product Installation Configuration window displays.

- Step 24** To configure the platform now, choose **Proceed**.

The Upgrade During Installation window displays.

- Step 25** In the Upgrade During Install window, choose **No**.

- Step 26** In the Windows Upgrade window, choose **No**.

- Step 27** In the Basic Install window, choose **Continue**. Continue with the “Basic Installation” section on page 3-16.

#### Basic Installation

- Step 28** When the Timezone Configuration displays, choose the appropriate time zone for the server and then choose **OK**.

The Auto Negotiation Configuration window displays.

- Step 29** The installation process allows you to automatically set the speed and duplex settings of the Ethernet network interface card (NIC) by using automatic negotiation. You can change this setting after installation.

- To enable automatic negotiation, choose **Yes**. The DHCP Configuration window displays.




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**Note** To use this option, your hub or Ethernet switch must support automatic negotiation.

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- To disable automatic negotiation, choose **No**. The NIC Speed and Duplex Configuration window displays.

- Step 30** If you chose to disable automatic negotiation, manually choose the appropriate NIC Speed and Duplex settings now and choose **OK** to continue.

The DHCP Configuration window displays.

- Step 31** For network configuration, you can choose to either set up static network IP address for the node or to use Dynamic Host Configuration Protocol (DHCP).

- If you have a DHCP server that is configured in your network and want to use DHCP, choose **Yes**. The network restarts, and the Administrator Login Configuration window displays.
- If you want to configure static IP address for the node, choose **No**. The Static Network Configuration window displays.

- Step 32** If you chose not to use DHCP, enter your static network configuration values and choose **OK**. See Table 2-2 for field descriptions.

The DNS Client Configuration window displays.

**Step 33** To enable DNS, choose **Yes**, enter your DNS client information, and choose **OK**. See Table 2-2 for field descriptions.

The network restarts by using the new configuration information, and the Administrator Login Configuration window displays.

**Step 34** Enter your Administrator login and password from the Installation Information Worksheet.



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**Note** The Administrator login must start with an alphabetic character, be at least six characters long, and can contain alphanumeric characters, hyphens, and underscores. You will need the Administrator login to log in to Cisco Unified Communications Operating System Administration, the command line interface, and the Disaster Recovery System.

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The Certificate Signing Request Information window displays.

**Step 35** Enter your certificate signing request information from the Installation Information Worksheet and choose **OK**.

The First Node Configuration window displays.

**Step 36** To configure this server as a subsequent node in the cluster, choose **No**.

The First Node Access Configuration window displays.

**Step 37** Enter the First Node Access Configuration information from the Installation Information Worksheet.

The SMTP Host Configuration window displays.

**Step 38** If you want to configure an SMTP server, choose **Yes** and enter the SMTP server name.



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**Note** You must configure an SMTP server to use certain platform features; however, you can also configure an SMTP server later by using the platform GUI or the command line interface.

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The Platform Configuration Confirmation window displays.

**Step 39** To start installing the software, choose **OK**, or if you want to change the configuration, choose **Back**.

When the installation process completes, you get prompted to log in by using the administrator account and password.

**Step 40** To log in, enter the account name **CCMAdministrator** and the password that you entered during installation.

**Step 41** Complete the post-upgrade tasks that are listed in the Post-Upgrade Checklist.

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## Related Training

Please check back for updated training links.

