



Cisco Unified Web and E-Mail Interaction Manager Upgrade Guide

For Unified Contact Center Enterprise

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Welcome to Cisco® Unified EIM & WIM™, multichannel interaction software used by businesses all over the world to build and sustain customer relationships. A unified suite of the industry’s best applications for web and email interaction management, it is the backbone of many innovative contact center and customer service helpdesk organizations.

Unified EIM & WIM includes a common platform and one or both of the following applications:

- ▶ Cisco Unified Web Interaction Manager (Unified WIM)
- ▶ Cisco Unified E-Mail Interaction Manager (Unified EIM)

Audience

This *Cisco Unified Web and E-Mail Interaction Manager Upgrade Guide* describes the various tasks required to upgrade your Unified EIM & WIM 9 application to Unified EIM & WIM 11.0(1). This guide is intended for installation engineers, system administrators, and database administrators who are responsible for installing and maintaining Unified EIM & WIM installations that are either standalone or integrated with Cisco Unified Contact Center Enterprise (Unified CCE).

To assist you with the upgrade process, this guide includes a check list that you can use to track your progress. Find “[Appendix B: Check List](#)” on [page 58](#). Use this list to mark off items as you progress through the upgrade process.



Important: If your Unified EIM & WIM 9 system includes customizations, contact Cisco before upgrading to Unified EIM & WIM 11.0(1).

Obtaining Documentation and Submitting a Service Request

For information on obtaining documentation, using the Cisco Bug Search Tool (BST), submitting a service request, and gathering additional information, see *What's New in Cisco Product Documentation*, at: <http://www.cisco.com/c/en/us/td/docs/general/whatsnew/whatsnew.html>.

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Field Alerts and Field Notices

Cisco products may be modified or key processes may be determined to be important. These are announced through use of the Cisco Field Alerts and Cisco Field Notices. You can register to receive Field Alerts and Field Notices through the Product Alert Tool on Cisco.com. This tool enables you to create a profile to receive announcements by selecting all products of interest.

Log into www.cisco.com and then access the tool at <http://www.cisco.com/cisco/support/notifications.html>

Document Conventions

This guide uses the following typographical conventions.

Convention	Indicates
<i>Italic</i>	Emphasis. Or the title of a published document.
Bold	Labels of items on the user interface, such as buttons, boxes, and lists. Or text that must be typed by the user.
Monospace	The name of a file or folder, a database table column or value, or a command.
<i>Variable</i>	User-specific text; varies from one user or installation to another.


Document conventions

Other Learning Resources

Various learning tools are available within the product, as well as on the product CD, and our web site. You can also request formal end-user or technical training.

Online Help

The product includes topic-based as well as context-sensitive help.

Use	To view
 Help button	Topics in <i>Cisco Unified Web and E-Mail Interaction Manager Help</i> ; the Help button appears in the console toolbar on every screen.
F1 keypad button	Context-sensitive information about the item selected on the screen.

Online help options

Document Set

The latest versions of all Cisco documentation can be found online at <http://www.cisco.com>

- ▶ All Unified EIM documentation can be found online at http://www.cisco.com/en/US/products/ps7236/tsd_products_support_series_home.html
- ▶ All Unified WIM documentation can be found online at http://www.cisco.com/en/US/products/ps7233/tsd_products_support_series_home.html
- ▶ In particular, Release Notes for these products can be found at http://www.cisco.com/en/US/products/ps7236/prod_release_notes_list.html
- ▶ For general access to Cisco Voice and Unified Communications documentation, go to http://www.cisco.com/en/US/products/sw/voicesw/tsd_products_support_category_home.html

The document set contains the following guides:

- ▶ *Hardware and System Software Specification for Cisco Unified Web and E-Mail Interaction Manager*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Installation Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide*

User guides for agents and supervisors

- ▶ *Cisco Unified Web and E-Mail Interaction Manager Agent's Guide*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Supervisor's Guide*

User guides for Knowledge Base managers and authors

- ▶ *Cisco Unified Web and E-Mail Interaction Manager Knowledge Base Author's Guide*

User guides for administrators

- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Routing and Workflows*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Chat and Collaboration Resources*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Email Resources*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Data Adapters*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Offers Console*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Reports Console*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to System Console*
- ▶ *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Tools Console*

1 Planning

- ▶ [Planning the Upgrade](#)
- ▶ [Verifying Unified EIM & WIM 9 Release Version](#)
- ▶ [Planning the Unified EIM & WIM 11.0\(1\) Installation](#)
- ▶ [Running Pre-Upgrade Utilities](#)
- ▶ [Planning Downtime](#)
- ▶ [Getting Started](#)

To upgrade to Unified EIM & WIM 11.0(1), you need to complete a number of tasks, which include planning for new hardware, potential infrastructural upgrades, and completing certain pre-upgrade, upgrade, and post-upgrade tasks.

This chapter will help you to plan your upgrade, and make decisions about certain configuration options available in Unified EIM & WIM 11.0(1).

The Unified EIM & WIM 11.0(1) Upgrader supports upgrade from Unified EIM & WIM 9 or higher to Unified EIM & WIM 11.0(1).

Planning the Upgrade

- ▶ Read this guide before upgrading to Unified EIM & WIM 11.0(1). The chapter [“Pre-Upgrade Tasks” on page 15](#) contains a set of tasks that must be completed before beginning the upgrade.
- ▶ To assist you with the upgrade process, this guide includes a check list that you can use to track your progress. Find [“Appendix B: Check List” on page 58](#) and print it. Use this list to mark off items as you progress through the upgrade process.
- ▶ You *must* run the Pre Upgrade utilities before running the actual Upgrader. For details, see [“Running Pre-Upgrade Utilities” on page 13](#).
- ▶ While upgrading from Unified EIM & WIM 9 to Unified EIM & WIM 11.0(1), you need to first install Unified EIM & WIM 11.0(1), and then run the Upgrader on the Unified EIM & WIM 11.0(1) file server and services server.
- ▶ The report summarization job on the Unified EIM & WIM 11.0(1) databases should be up to date before the upgrade is performed ([page 21](#)). You *must* perform this task before taking backups of the databases for the upgrade.
- ▶ During the upgrade process, the Unified EIM & WIM 11.0(1) servers *do not* need to connect to the Unified EIM & WIM 9 servers.

Verifying Unified EIM & WIM 9 Release Version

The Unified EIM & WIM 9 installation should be on one of the following versions to be able to upgrade to Unified EIM & WIM 11.0(1).

- ▶ 9.0(1): ES1 to ES3
- ▶ 9.0(2): ES1 to ES8

To verify the release version:

1. Open the Unified EIM & WIM 9 Login window and click the **About** button.
2. Click the History tab and verify that the current version is supported for the upgrade.

Planning the Unified EIM & WIM 11.0(1) Installation

- ▶ Acquire new hardware for installing Unified EIM & WIM 11.0(1) ([page 17](#)).
- ▶ Acquire new license files if you are buying new products for Unified EIM & WIM 11.0(1) ([page 17](#)). Otherwise you can continue to use the Unified EIM & WIM 9 licences for your EIM & WIM 11.0(1) installation.
- ▶ Except for a couple of things, your Unified EIM & WIM 11.0(1) deployment must exactly match the Unified EIM & WIM 11.0(1) installation. For a complete list, see “[Installing Unified EIM & WIM 11.0\(1\)](#)” on [page 18](#).

Running Pre-Upgrade Utilities

The Upgrader comes with two utilities, DB PreCheck Utility and DBUpdate Utility, that can be run before doing the actual upgrade. The DB PreCheck utility can be run on Unified EIM & WIM 9 production databases. The DBUpdate Utility must always be run on copies of databases, and *not* on the actual Unified EIM & WIM 9 databases.



Important: It is highly recommended that you run these utilities before running the actual Upgrader on your installation.

- ▶ The DB PreCheck Utility checks if there is any data in the databases that can cause the upgrade to fail. If any such issues are found, it logs them in a file. All these issues must be fixed before running the actual upgrader. This is a read only utility and does not make any modifications on the databases.
- ▶ The DBUpdate Utility actually upgrades the standalone copies of the databases and reports if the upgrade can fail because of any database issues. The utility can also help you estimate the disk space required on the database servers.

For details about running these utilities, see “[Appendix A: Pre-Upgrade Utilities](#)” on [page 43](#).

Planning Downtime

The time required to upgrade your installation will depend on a number of factors. This section lists all those factors and helps you determine the downtime required for your installation.

The task of installing Unified EIM & WIM 11.0(1) can be done independent of this downtime.

- ▶ **Time to back-up and restore Unified EIM & WIM 9 databases** ([page 26](#)): This time will vary based on the size of your databases. You can do a standalone back-up and restore of your databases to estimate the required time.
- ▶ **Time to copy folders from Unified EIM & WIM 9 to Unified EIM & WIM 11.0(1) systems:** This time will vary based on the size of these folders. You can also do this task before the actual downtime. However, you must ensure that before you run the upgrader, all the contents of these folders have been copied over to the Unified EIM & WIM 11.0(1) file server.

- ▶ **Four** hours to do other upgrade tasks.

Add all these times to determine the total downtime required for the upgrade.

Getting Started

The upgrade process involves completing the following activities, in sequence:

- ▶ **Pre-upgrade tasks:** To be performed before you begin the upgrade. For detailed instructions, refer to [“Pre-Upgrade Tasks” on page 15](#).
- ▶ **Upgrade tasks:** Run the Upgrader on the file server and the services server. Details are in [“Upgrade Process” on page 27](#).
- ▶ **Post-upgrade tasks:** To be performed after completing the upgrade. For details, refer to [“Post-Upgrade Tasks” on page 35](#).

Pre-Upgrade Tasks

- ▶ [Acquiring Hardware](#)
- ▶ [Acquiring Licenses](#)
- ▶ [Installing Unified EIM & WIM 11.0\(1\)](#)
- ▶ [Verifying Topology of Unified EIM & WIM 9 and Unified EIM & WIM 11.0\(1\) Installations](#)
- ▶ [Backing up Unified EIM & WIM 11.0\(1\) Installation](#)
- ▶ [Verifying Status of Reports Summarization Job in EIM & WIM 9](#)
- ▶ [Verifying Actions Information in Unified EIM & WIM 9](#)
- ▶ [Removing Aliases From Retriever Instances in Unified EIM & WIM 9](#)
- ▶ [Stopping the Application](#)
- ▶ [Copying Files and Folders from the Unified EIM & WIM 9 File Server](#)
- ▶ [Copying Folders From the Unified EIM & WIM 9 Services Server](#)
- ▶ [Copying Folders From the Unified EIM & WIM 9 Application Server](#)

- ▶ [Copying Folders From the Unified EIM & WIM 9 Web Server](#)
- ▶ [Backing up and Restoring Databases on Unified EIM & WIM 11.0\(1\) Database Machines](#)

This chapter describes the pre-upgrade procedures that need to be completed before beginning the upgrade process.

Acquiring Hardware

Acquire new hardware for installing Unified EIM & WIM 11.0(1). See the *Hardware and System Software Specification for Cisco Unified Web and E-Mail Interaction Manager* and *Cisco Unified Web and E-Mail Interaction Manager Solution Reference Network Design Guide* for details about the type of hardware and software needed for installing these servers. In addition to following the sizing guidelines provided in the *Cisco Unified Web and E-Mail Interaction Manager Solution Reference Network Design Guide*, make sure that the following disk space is available on the servers:

- ▶ On the services server, the free disk space available should be the sum of the following numbers:
 - Current size of the Unified EIM & WIM home directory + 10 GB. For example, if your home directory size is 100 GB, you should have at least 110 GB space available.
- ▶ On the file server, the free disk space available should be the sum of the following numbers:
 - Current size of the Unified EIM & WIM home directory + 10 GB. For example, if your home directory size is 100 GB, you should have at least 110 GB space available.
- ▶ If the file and services servers are installed on the same machine, the free disk space available should be the sum of the following numbers:
 - Current size of the Unified EIM & WIM home directory + 10 GB. For example, if your home directory size is 100 GB, you should have at least 110 GB space available.
- ▶ On the database server, the free disk space available should be the sum of the following numbers:

In SQL Enterprise Edition installations:

- **Active database:** Current size of the Unified EIM & WIM 9 active database + 25% of the size of the current database. For example, if your database size is 100 GB, you should have at least 125 GB space available.
- **Reports database:** Current size of the Unified EIM & WIM 9 reports database + 40% of the size of the current database. For example, if your database size is 100 GB, you should have at least 140 GB space available.

In SQL Standard Edition installations:

- **Active database:** Current size of the Unified EIM & WIM 9 active database + 40% of the size of the current database. For example, if your database size is 100 GB, you should have at least 140 GB space available.
- **Archive Database:** Current size of the Unified EIM & WIM 9 archive database + 25% of the size of the current database. For example, if your database size is 100 GB, you should have at least 125 GB space available.

Acquiring Licenses

- ▶ You need new license files only if you are buying new products for Unified EIM & WIM 11.0(1) or changing the number of licenses. Make sure you have the Unified EIM & WIM 11.0(1) licenses ready with you before you begin the upgrade. You will need them to complete the upgrade process. Contact your account manager for the licenses.

Installing Unified EIM & WIM 11.0(1)



Important: This task does not need to be done during the scheduled downtime for upgrade.

Your Unified EIM & WIM 11.0(1) installation should exactly match the Unified EIM & WIM 9 installation. Follow the instructions in the *Cisco Unified Web and E-Mail Interaction Manager Installation Guide* to install Unified EIM & WIM 11.0(1). Some things to note while doing the installation are:

- ▶ While installing Unified EIM & WIM 11.0(1), you have the option to change *only* the following:
 - The database authentication can be changed from SQL to Windows authentication or from Windows to SQL Authentication.
 - You can install the Reports Database (MSSQL Enterprise Edition) or the Archive database (MSSQL Standard Edition) on separate database server if they are on same server as the Active database server in Unified EIM & WIM 9.
- ▶ If your Unified EIM & WIM 9 installation was integrated with Unified CCE, you do not need to run the Unified EIM & WIM Integration wizard while installing Unified EIM & WIM 11.0(1). If the Unified EIM & WIM 9 installation was not integrated with Unified CCE, and you plan to integrate the upgraded installation, do not run the Unified EIM & WIM Integration wizard while installing Unified EIM & WIM 11.0(1). The integration wizard must be run only after the Upgrader has been run.
- ▶ Unified EIM & WIM 11.0(1) must be installed using the same context root and partition name as the Unified EIM & WIM 9. You *cannot* use any other name.
 - To find the context root name, run the following query on the Unified EIM & WIM 9 active database:

```
SELECT VALUE FROM EGPL_CONFIG_PROPERTY WHERE NAME = 'eservice.module.context'
```
 - To find the partition name, run the following query on the Unified EIM & WIM 9 master database:

```
SELECT PARTITION_NAME FROM EGPL_DSM_PARTITION WHERE PARTITION_ID = 1
```
- ▶ The database collation setting in Unified EIM & WIM 9 must match the database collation setting that was selected in Unified EIM & WIM 11.0(1). To find out the collation setting of the EIM & WIM 9 databases, run the following query on one of the databases: `select databasepropertyex('Database_Name','collation')`
- ▶ If you were using SSL for your Unified EIM & WIM 9 installation, you can use the same certificate that you had acquired for Unified EIM & WIM 9 for the Unified EIM & WIM 11.0(1) installation.

Verifying Topology of Unified EIM & WIM 9 and Unified EIM & WIM 11.0(1) Installations

The upgrader requires that:

- ▶ The number of messaging, application, and services servers in your Unified EIM & WIM 9 and Unified EIM & WIM 11.0(1) deployments must match exactly. For example, if your Unified EIM & WIM 9 installation has two messaging servers, two application servers, and one services server, the Unified EIM & WIM 11.0(1) installation should also have the same number of servers.
- ▶ The deployment model for the messaging, application, and services servers in your Unified EIM & WIM 9 and Unified EIM & WIM 11.0(1) deployments must match exactly. For example, if in the Unified EIM & WIM 9 installation the application and messaging servers are installed on the same machine and the services server is installed on a separate machine, your Unified EIM & WIM 11.0(1) installation must have the exact same configuration.

The **CheckTopology** Utility runs a check on the Unified EIM & WIM 9 and Unified EIM & WIM 11.0(1) systems and helps determine if the upgrade can fail because of any such topology mismatches. The utility can be run from any machine which has access to the Unified EIM & WIM 9 and Unified EIM & WIM 11.0(1) databases.

Preparing to Run the CheckTopology Utility

Installing JDK

- ▶ Install JDK 1.7 Update 2 or higher on the machines from where you are going to run the utilities.

Configuring Database URLs

To be able to run the utility, you have to configure database URLs for the Unified EIM & WIM 9 and Unified EIM & WIM 11.0(1) master databases. This section describes the format of these URLs. You will require these URLs while configuring the utility.

Configure URLs for the following databases:

- ▶ Unified EIM & WIM 9 master database
- ▶ Unified EIM & WIM 11.0(1) master database

To configure the database URLs:

The database URLs are configured in the format:

```
jdbc:sqlserver://Server_Name:Port_Number;instanceName=Instance_Name;integratedSecurity=true_or_false;databaseName=Database_Name
```

Where:

- ▶ *Server_Name*: Name of the server where the Unified EIM & WIM master database is installed.
- ▶ *Port_Number*: The port number for the MSSQL server. The default port is 1433.
- ▶ *Instance_Name*: The name of the MSSQL instance for the database. The default instance is MSSQLSERVER.

- ▶ `integratedSecurity`: Set the value to `true` if you are using Windows Authentication to connect to the database. Set the value to `false` if you are using the SQL Server Authentication mode.
- ▶ `Database_Name`: Name of the Unified EIM & WIM master database.

For example, the database URL will look like:

```
jdbc:sqlserver://productDB:1433;instanceName=mssqlserver;integratedSecurity=true;databaseName=MasterDB
```

Running the CheckTopology Utility

To run the CheckTopology Utility:

1. Create a temporary folder, *Temporary_Folder*.
2. From the upgrade files, copy the `Utilities\CheckTopology` folder into *Temporary_Folder*.
3. Open the `Temporary_Folder\CheckTopology\standalone.properties` file in a text editor and set the following properties:
 - `V11_MASTER_DATABASE_URL`: Provide the and Unified EIM & WIM 11.0(1) master database URL. For the format of the URL, see [“Configuring Database URLs” on page 19](#).
 - `EIM_WIM_9_MASTER_DATABASE_URL`: Provide the and Unified EIM & WIM 9 master URL. For the format of the URL, see [“Configuring Database URLs” on page 19](#).

Set the following properties only if you are using SQL Server Authentication to connect to the database.

- `EIM_WIM_11_MASTER_ADMIN_USER`: User name of the database administrator for Unified EIM & WIM 11.0(1) MSSQL Server. Any database user with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
 - `EIM_WIM_11_MASTER_ADMIN_PASS`: Password of the Unified EIM & WIM 11.0(1) database administrator.
 - `EIM_WIM_9_MASTER_ADMIN_USER`: User name of the database administrator for Unified EIM & WIM 9 MSSQL Server. Any database user with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
 - `EIM_WIM_9_MASTER_ADMIN_PASS`: Password of the Unified EIM & WIM 9 database administrator.
4. Open the `Temporary_Folder\CheckTopology\CheckTopology.bat` file in a text editor and set the following properties:
 - Locate the `SET JAVA_HOME` property and set the value to the location where JDK 1.7 Update 2 or higher is installed on your machine ([page 19](#)). For example, `C:/Java/jdk1.7.0_02`.
 5. Double-click `CheckTopology.bat` to launch the utility. You will be notified when the check is completed.



Important: If you use Windows Authentication for your databases, launch the utility with a user who can login to the database server.

- If the utility fails to execute because of any configuration issues, error messages are logged in the `egpl_checktopology.log`. The log file is created at the same location from where you launch the utility. Fix the properties configured in the `standalone.properties` and `CheckTopology.bat` files and try to run the utility again.

- If the topology check fails, the log messages are logged in the `egpl_checktopology.log` file. The log file is created at the same location from where you launch the utility. Please contact Cisco Support for further assistance.

Backing up Unified EIM & WIM 11.0(1) Installation



Important: This task does not need to be done during the scheduled downtime for upgrade.

Take a back-up of the EIM & WIM 11.0(1) installation on the following servers:

- ▶ File server
- ▶ Services server
- ▶ Application server
- ▶ Web servers

Verifying Status of Reports Summarization Job in EIM & WIM 9

The report summarization job on the EIM & WIM 9 databases should be up to date before the upgrade is performed. You *must* perform this task before taking backups of the databases for the upgrade.



Important: This task does not need to be done during the scheduled downtime for upgrade.

To check the status of reports summarization job:

- ▶ Run the following query on the EIM & WIM 9 reports database to find when the job was last run. If your installation uses MSSQL Standard Edition, then run the query on the Unified EIM & WIM 9 active database:

```
select isnull(min(lastrun_datetime),getutcdate()) from  
egplr_scheduled_task_status where script_id != 101
```

The query will give you the date and time of the last successful run of the job. If the date and time is older than 24 hours, it means that the job is not running properly on your system. Contact Cisco Support for assistance to fix this issue.

Verifying Actions Information in Unified EIM & WIM 9

Run the `verify_actions.sql` script on the Unified EIM & WIM 9 active database to check if there are any actions related data discrepancies.



Important: If the script finds any actions related data discrepancies, contact Cisco Support for assistance. Do not proceed with the upgrade before getting this issue fixed.

To verify actions information in the Unified EIM & WIM 9 active database:

1. Create a temporary folder, *Temporary_Folder*.
2. From the upgrade files, copy the `Utilities\VerifyActions` folder into *Temporary_Folder*.
3. Run the `Temporary_Folder\Utilities\VerifyActions\verify_actions.sql` script on the Unified EIM & WIM active database. If the output of the script is `No discrepancy found in actions data`, the information in your active database is okay and you can proceed to the next step. If the output of the script is `Discrepancy found in actions data`, contact Cisco Support for assistance.

Removing Aliases From Retriever Instances in Unified EIM & WIM 9

Skip this task if your installation does not include Unified EIM. Before running the Upgrader, remove the association of the email aliases from all the Retriever Service instances on the Unified EIM & WIM 9 installation.

To remove aliases from a retriever instance:

1. Log in to the application as a partition administrator and go to the System Console.
2. In the Tree pane, browse to **System > Partition > *Partition_Name* > Services > Email > Retriever**.
3. In the List pane, select a retriever instance.
4. In the Properties pane, go to the Input tab and remove the aliases associated with the instance.
5. Click the **Save** button.

Stop the retriever instance. The retriever will stop picking emails from the alias only after you stop the retriever instance.

Stopping the Application

Make sure that the application is stopped on the Unified EIM & WIM 9 machines and the Unified EIM & WIM 11.0(1) machines.

To stop Unified EIM & WIM:

- ▶ In single-server installations:
 - In the Windows Services panel, stop the Cisco service to stop all Cisco services.
- ▶ In a distributed-server installation:
 - a. On each application server machine, stop the Cisco Windows service from the Windows Services panel.
 - b. On the messaging server machine, stop the Cisco Windows service from the Windows Services panel.
 - c. On the services server machine, stop the Cisco Windows service from the Windows Services panel.
 - d. On the services server machine, open the Windows Task Manager and verify that none of the javaw and java processes (the services) are running.

Copying Files and Folders from the Unified EIM & WIM 9 File Server

Copying the EAR from the Unified EIM & WIM 9 File Server

Before the upgrade, the `eService.ear` file has to be copied manually from the Unified EIM & WIM 9 file server to a temporary directory on the Unified EIM & WIM 11.0(1) file server. You *must not* overwrite the Unified EIM & WIM 11.0(1) `eService.ear` with Unified EIM & WIM 9 `eService.ear` file.

To copy the EAR:

1. Create a Temporary folder, *temp*, on the Unified EIM & WIM 11.0(1) file server. If the Unified EIM & WIM 11.0(1) file server is on NAS, create the folder on the services server from where the upgrader will be run.
2. From the Unified EIM & WIM 9 file server, copy the `Cisco_Home\eService\installation\ear\eService.ear` file and paste it to the *temp* folder you created in step 1. For example, `c:\temp\Cisco11\ear`. You will be asked for this location while running the Unified EIM & WIM 11.0(1) upgrader.

Copying Unified EIM & WIM 11.0(1) License Files

You need to copy the license files from the Unified EIM & WIM 9 file server to the Unified EIM & WIM 11.0(1) file server. If you are buying new products for Unified EIM & WIM 11.0(1), copy the new licence files acquired from Cisco.

To copy the license file:

- ▶ From the Unified EIM & WIM 9 file server, copy the license files and paste them to the following location on the Unified EIM & WIM 11.0(1) file server: `Cisco_Home\eService\config\license`. If you got new license files from Cisco ([page 17](#)), copy those licenses instead of the Unified EIM & WIM 9 licences.

Copying Folders From the Unified EIM & WIM 9 File Server

Before the upgrade, the `storage`, `chatbot reporter`, and the `reports history` folders have to be copied manually from the Unified EIM & WIM 9 file server to the Unified EIM & WIM 11.0(1) file server.

To copy the folders:

- ▶ From the Unified EIM & WIM 9 file server, copy the contents of the `Cisco_Home\eService\storage` folder and paste them in the existing `Cisco_Home\eService\storage` folder on the Unified EIM & WIM 11.0(1) file server.
- ▶ From the Unified EIM & WIM 9 file server, copy the contents of the `Cisco_Home\eService\reports\1\history` folder and paste them to the existing `Cisco_Home\eService\reports\1\history` folder on the Unified EIM & WIM 11.0(1) file server.
- ▶ From the Unified EIM & WIM 9 file server, copy the contents of the `Cisco_Home\eService\chatbot\reporter` folder and paste them in the existing `Cisco_Home\eService\chatbot\reporter` folder on the Unified EIM & WIM 11.0(1) file server.

Copying Folders From the Unified EIM & WIM 9 Services Server

Before the upgrade, the `lib` folder has to be copied manually from the Unified EIM & WIM 9 services server to the Unified EIM & WIM 11.0(1) services server.

To copy the folders:

- ▶ From the Unified EIM & WIM 9 services server, copy the contents of the `Cisco_Home\eService\lib` folder and paste them in the existing `Cisco_Home\eService\lib` folder on the Unified EIM & WIM 11.0(1) services server.

Copying Folders From the Unified EIM & WIM 9 Application Server

Before the upgrade, the `index` folder has to be copied manually from the Unified EIM & WIM 9 application server to the Unified EIM & WIM 11.0(1) application server.



Important: Perform this task on all the application servers in your installation.

To copy the folders:

- ▶ From the Unified EIM & WIM 9 application server, copy the contents of the `Cisco_Home\eService\index` folder and paste them in the existing `Cisco_Home\eService\index` folder on the Unified EIM & WIM 11.0(1) application server.

Copying Folders From the Unified EIM & WIM 9 Web Server

Before the upgrade, copy the custom templates folders and customizations in the `web-custom` folder from the Unified EIM & WIM 9 web server to the Unified EIM & WIM 11.0(1) web server.



Important: Perform this task on all the web servers in your installation.

To copy the folders:

1. For installations upgrading from Unified EIM & WIM 9.0(2): From the Unified EIM & WIM 9.0(2) web server, copy the contents of the `Cisco_Home\eService\web\custom` folder and paste them in the existing `Cisco_Home\eService\web\custom` folder on the Unified EIM & WIM 11.0(1) web server.



Important: For installations upgrading from Unified EIM & WIM 9.0(1), do not copy the `custom` folder to the Unified EIM & WIM 11.0(1) web server.

2. From the Unified EIM & WIM 9 web server, copy the custom templates from of the `Cisco_Home\eService\templates\chat` folder and paste them in the existing `Cisco_Home\eService\templates\chat` folder on the Unified EIM & WIM 11.0(1) web server. Make sure you do not overwrite the following Unified EIM & WIM 11.0(1) out-of-the-box templates:
 - `Cisco_Home\eService\templates\chat\sunburst`

Skip this task if the Unified EIM & WIM 9 does not have any custom template folders.

Backing up and Restoring Databases on Unified EIM & WIM 11.0(1) Database Machines

- ▶ Take a backup of the Unified EIM & WIM 9 databases and restore them on the database servers where the respective Unified EIM & WIM 11.0(1) databases are installed. Before taking the backup check to see if the report summarization job is up to date ([page 21](#)).



Important: While restoring the Unified EIM & WIM 9 databases, ensure that the names of the restored databases are different than the Unified EIM & WIM 11.0(1) databases.

Back up and restore the following databases:

- Master database
- Active database
- Reports database (For installations using Enterprise Edition of MSSQL)
- Archive database (For installations using Standard Edition of MSSQL)

3 Upgrade Process

- ▶ [Upgrade Overview](#)
- ▶ [Upgrading the File Server](#)
- ▶ [Upgrading the Services Server](#)

This chapter describes the process of upgrading from Unified EIM & WIM 9 version 9.0.1.0 or higher to Unified EIM & WIM 11.0(1). Before beginning the upgrade, ensure that you have complied with all the prerequisites listed in “[Pre-Upgrade Tasks](#)” on page 15.

The Upgrader needs to be run on the file server and services server.

Upgrade Overview

In single-server installations, run the Upgrader on the file server. In distributed server installations, run the Upgrader on the file server and the services server. Always run the Upgrader on the file server first.



Important: If the file server is installed on a NAS device, run the Upgrader from the services server and the file server will be upgraded along with it.

Upgrading the File Server

Run the Upgrader on the Unified EIM & WIM 11.0(1) file server.



Important: When running the upgrade you must be logged on to the server using the same domain account that was used for installing Unified EIM & WIM 11.0(1).

To upgrade the file server:

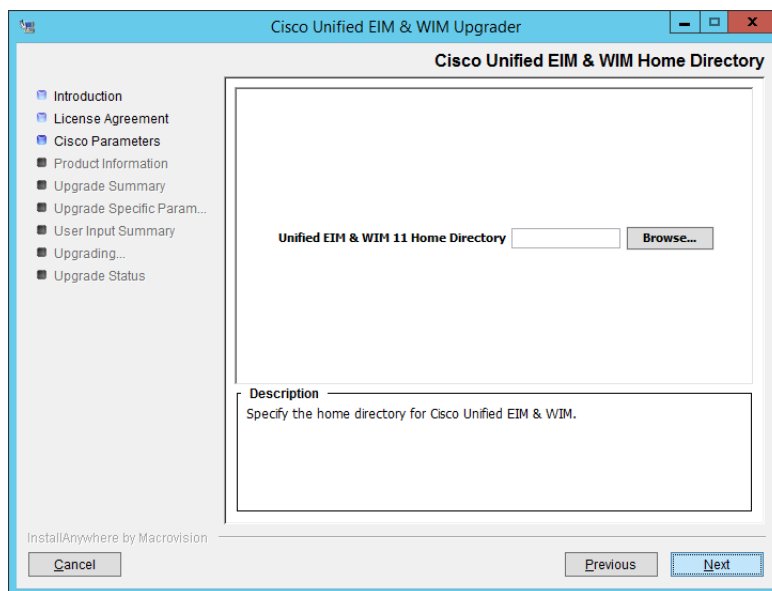
1. Check to see that you have closed all the application files before you begin the upgrade. For example, `eService.ear` or any other files opened from any other application folders should be closed.
2. Create a temporary folder, *Temporary_Folder*.
3. From the upgrade files, copy `setup_windows.exe`, `setup_windows.properties`, and `CiscoService.zip` into *Temporary_Folder*.
4. Double-click `setup_windows.exe` to launch the Unified EIM & WIM 11.0(1) Upgrader.
5. When the Introduction window appears, read the installation instructions. Click **Next**.

6. In the License Agreement window, review the licensing terms and select the **I accept the terms of the License Agreement** option. Click **Next**.



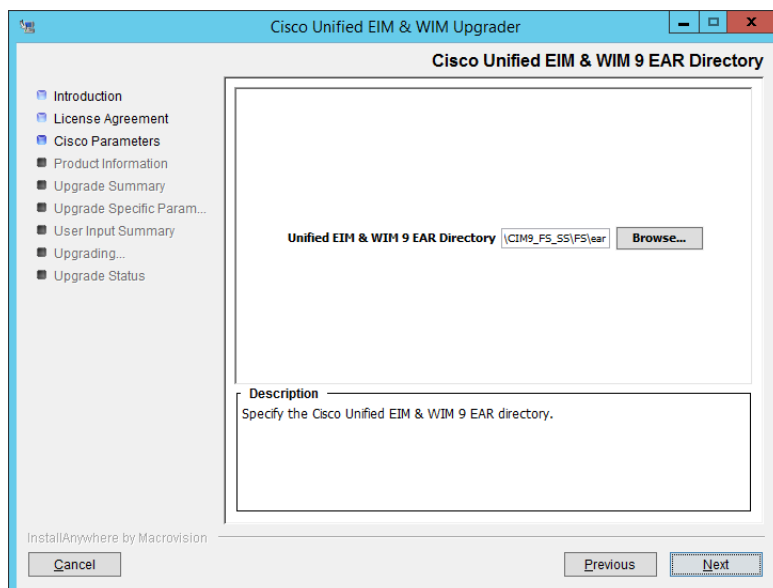
Read and accept the terms of the License Agreement

7. In the Cisco Unified EIM & WIM Home Directory window, type the path or browse to the folder where Unified EIM & WIM 11.0(1) is installed. Click **Next**.



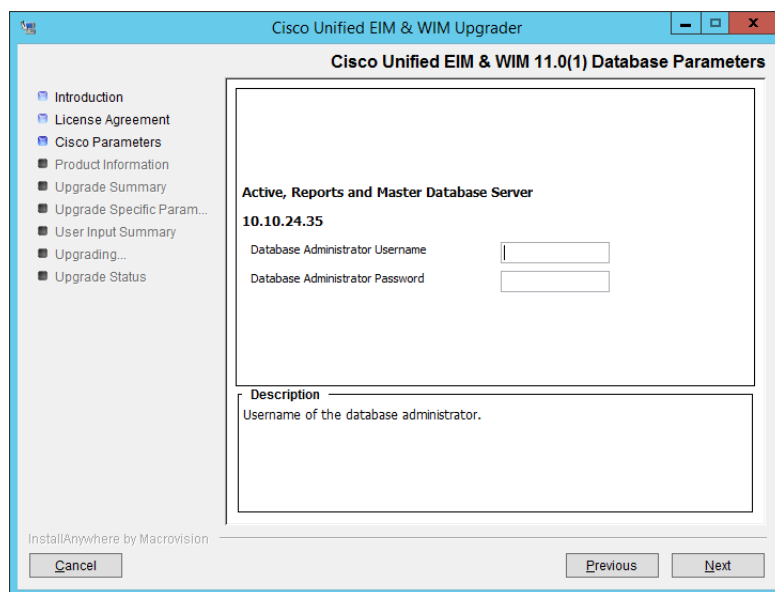
Provide the location of the Unified EIM & WIM home directory

8. In the Cisco Unified EIM & WIM 9 EAR Directory window, type the path or browse to the location where you copied the Unified EIM & WIM 9 EAR ([page 23](#)). Click **Next**.



Provide the location of the Unified EIM & WIM 9 EAR directory

9. In the Unified EIM & WIM 11.0(1) Database Parameters window, provide the username and password of the master and active database administrator, the archive database administrator or the reports database administrator. Click **Next**. This screen appears only if you are using the SQL Authentication mode to connect to the MSSQL Server.

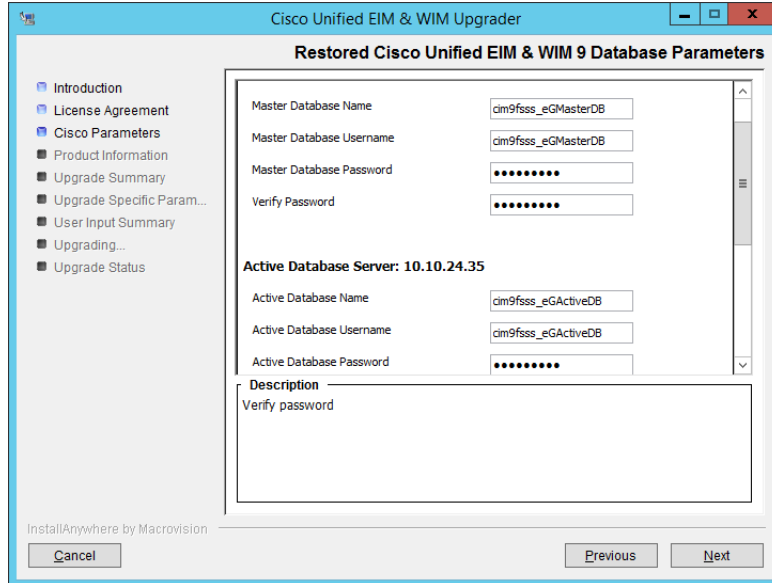


Provide the Unified EIM & WIM 11.0(1) database parameters

10. In the Restored Unified EIM & WIM Database Parameters window, provide the names of the Unified EIM & WIM 9 databases that you had restored on the Unified EIM & WIM 11.0(1) database machines ([page 26](#)). Also provide the usernames and passwords to be created for connecting to these databases. Make sure that

the usernames that you are using for the restored databases do not exist on the Unified EIM & WIM 11.0(1) database servers. To verify, open the Microsoft SQL Server Management Studio, browse to *Database_Server\Security\Logins* and check the database usernames that are already being used.

Click **Next**.



Provide the restored EIM & WIM 9 database parameters

11. In the Product Information window, check the current version of Unified EIM & WIM 9 installed. The current version should be 9.0.0 or higher. Click **Next**.
12. In the Upgrade Summary window, verify the version being installed. It should be 11.0.1. The screen also notifies you if you need to run the Upgrader on additional servers. Click **Next**.
13. In the User Input Summary window, verify the information provided by you during the upgrade process. Click **Install**.

The Upgrader creates a backup of the file system at

Cisco_Home\Patches\Backup\Pre_Upgrade_Version\FileServer and starts upgrading the application.

14. In the Upgrade Status window, click the **Close** button to complete the upgrade process.

Upgrading the Services Server

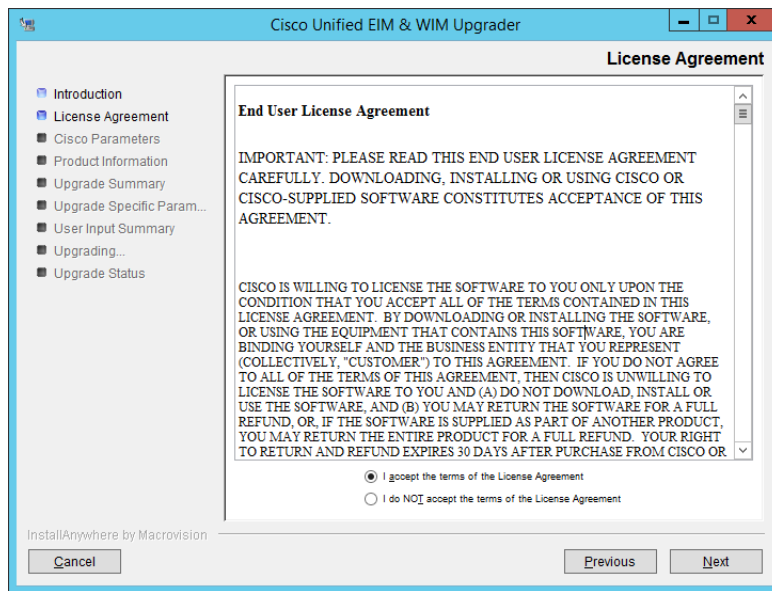
In distributed-server installations, the Upgrader needs to be run on the Unified EIM & WIM 11.0(1) services server.



Important: When running the upgrade you must be logged on to the server using the same domain account that was used for installing Unified EIM & WIM 11.0(1).

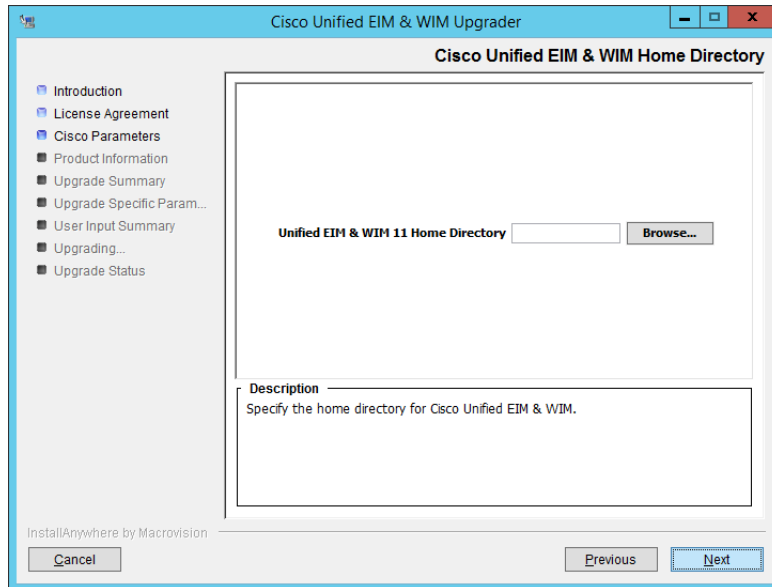
To upgrade the services server:

1. Check to see that you have closed all the application files before you begin the upgrade. For example, `eService.ear` or any other files opened from any other application folders must be closed.
2. Create a temporary folder, *Temporary_Folder*.
3. From the upgrade files, copy `setup_windows.exe`, `setup_windows.properties`, and `CiscoService.zip` into *Temporary_Folder*.
4. Double-click `setup_windows.exe` to launch the Unified EIM & WIM 11.0(1) Upgrader.
5. When the Introduction window appears, read the installation instructions. Click **Next**.
6. In the License Agreement window, review the licensing terms and select the **I accept the terms of the License Agreement** option. Click **Next**.



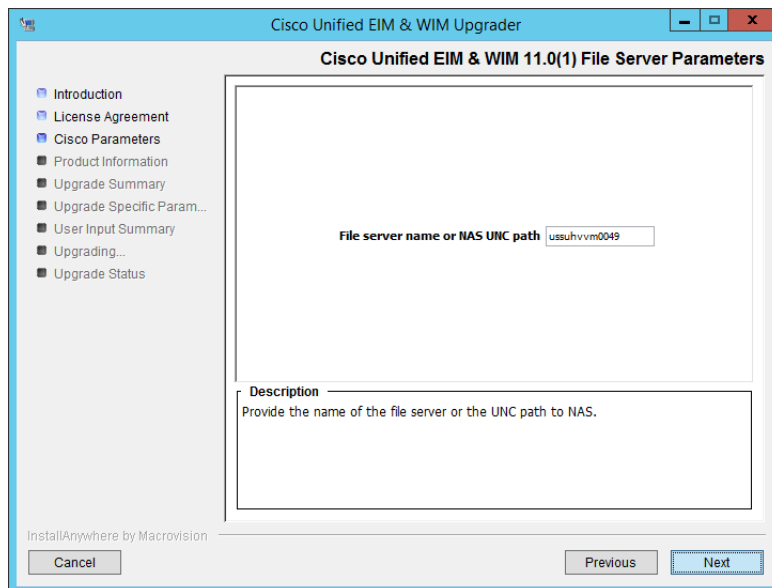
Read and accept the terms of the License Agreement

7. In the Cisco Unified EIM & WIM Home Directory window, type the path or browse to the folder where Unified EIM & WIM 11.0(1) is installed. Click **Next**.



Provide the location of the Unified EIM & WIM home directory

8. In the Unified EIM & WIM 11.0(1) File Server Parameters window, type the name of the Unified EIM & WIM 11.0(1) file server or the UNC path to NAS. Click **Next**.



Provide the location of the Unified EIM & WIM 11.0(1) file server

9. In the Product Information window, verify the Unified EIM & WIM 11.0(1) components installed on the machine. Click **Next**.
10. In the Upgrade Summary window, verify the version being installed. It should be 11.0(1). The screen also notifies you if you need to run the Upgrader on additional servers. Click **Next**.

11. In the User Input Summary window, verify the information entered by you during the upgrade process. Click **Install**.

The upgrader creates a backup of the Cisco home directory at

Cisco_Home\Patches\Backup\Pre_Upgrade_Version\FileServer and starts upgrading the installation.

12. In the Upgrade Status window, click the **Close** button to complete the upgrade process.



Post-Upgrade Tasks

- ▶ [Checking Status of Index Creation Job](#)
- ▶ [Updating Custom Chat Templates](#)
- ▶ [Updating Custom Conditions and Custom Rules in Workflows](#)
- ▶ [Updating Custom Packages on Web Servers](#)
- ▶ [Updating the Application Hostname Configuration in Unified CCE](#)
- ▶ [Starting Unified EIM & WIM 11.0\(1\)](#)
- ▶ [Updating Chat Links](#)
- ▶ [Assigning Licenses to Users](#)
- ▶ [Adding Aliases to Retriever Instances](#)
- ▶ [Setting up User Desktops](#)
- ▶ [Cleaning up the Database Servers](#)
- ▶ [Troubleshooting Procedures](#)

This chapter guides you through the tasks to be performed after upgrading the system. It also describes the process of restoring the Unified EIM & WIM 11.0(1) installation if the upgrade fails.

Checking Status of Index Creation Job

The Unified EIM & WIM Upgrader creates an **Index Creation** job on the database server of the Unified EIM & WIM 11.0(1) active database. After the upgrade finishes successfully, check the status of the job to ensure that it has successfully finished creating indexes.

To check the status of the job:

1. Create a temporary folder, *Temporary_Folder*.
2. From the upgrade files, copy the `Utilities\CreateIndexView` folder into *Temporary_Folder*.
3. After the upgrade finishes successfully, run the `Temporary_Folder\Utilities\CreateIndexView\check_indexed_view_job_status.sql` script on the Unified EIM & WIM active database to check the status of the **Index Creation** job.
 - If the job status is **Succeeded**, it has successfully created the indexes.
 - If the job status is **In Progress**, wait a few minutes for the job to finish and execute the `JobStatus.sql` script again to check the status of the job to ensure that it has successfully finished creating indexes.
 - If the job status is **Failed**, contact Cisco Support for assistance.

Updating Custom Chat Templates

You need to perform these tasks only if your installation includes Unified WIM and you want to use the new features introduced in Unified EIM & WIM 11.0(1). Perform these tasks on all Unified EIM & WIM 11.0(1) web servers in your deployment.

To update the custom chat template files:

1. Locate the Unified EIM & WIM 9 custom template folder you copied before running the upgrade ([page 25](#)).
2. Merge the updates in the following files from the Unified EIM & WIM 11.0(1) **Sunburst** template folder with the files in the custom template folders copied from Unified EIM & WIM 9. If a file doesn't exist in the custom template folder, copy it and paste it in:
 - `Cisco_Home\eService\templates\chat\sunburst\chat\js\connection.js`
 - `Cisco_Home\eService\templates\chat\sunburst\chat\js\session.js`
 - `Cisco_Home\eService\templates\chat\sunburst\chat\js\core.js`
 - `Cisco_Home\eService\templates\chat\sunburst\chat\js\survey.js`
 - `Cisco_Home\eService\templates\chat\sunburst\chat\js\audio.js`
 - `Cisco_Home\eService\templates\chat\sunburst\chat\js\chat.js`
 - `Cisco_Home\eService\templates\chat\sunburst\chat\js\editor.js`

- *Cisco_Home\eService\templates\chat\sunburst\chat\js\header.js*
- *Cisco_Home\eService\templates\chat\sunburst\chat\js\thanks.js*
- *Cisco_Home\eService\templates\chat\sunburst\chat\js\cobrowse.js*
- *Cisco_Home\eService\templates\chat\sunburst\chat\js\callback.js*
- *Cisco_Home\eService\templates\chat\sunburst\chat\less\chat-main.less*
- *Cisco_Home\eService\templates\chat\sunburst\chat\less\chat-mobile.less*
- *Cisco_Home\eService\templates\chat\sunburst\css\transcript.css*
- *Cisco_Home\eService\templates\chat\sunburst\chat.html*
- *Cisco_Home\eService\templates\chat\sunburst\GainLiveConfig.js*
- *Cisco_Home\eService\templates\chat\sunburst\transcript.js*
- *Cisco_Home\eService\templates\chat\sunburst\properties\chat_<LANGUAGE_CODE>_<COUNTRY_CODE>.properties*
- *Cisco_Home\eService\templates\chat\sunburst\messaging_<LANGUAGE_CODE>_<COUNTRY_CODE>.properties*
- *Cisco_Home\eService\templates\chat\sunburst\chat\js\login.js*
- *Cisco_Home\eService\templates\chat\sunburst\chat\js\messenger.js*
- *Cisco_Home\eService\templates\chat\sunburst\chat\js\utils.js*
- *Cisco_Home\eService\templates\chat\sunburst\chat\js\multiselect.js*
- *Cisco_Home\eService\templates\chat\sunburst\chat\css\jquery-ui-1.9.2.edited.min.css*
- *Cisco_Home\eService\templates\chat\sunburst\chat\css\multiselect.css*

3. Copy and paste the following files and folders from the Unified EIM & WIM 11.0(1) **Sunburst** template folder to your custom template folders copied from Unified EIM & WIM 9:

- *Cisco_Home\eService\templates\chat\sunburst\chat\css\editorcustomization.css*
- *Cisco_Home\eService\templates\chat\sunburst\chat\js\altEngmt.js*
- *Cisco_Home\eService\templates\chat\sunburst\transcript*
- *Cisco_Home\eService\templates\chat\sunburst\chat\img*
 - *mail.png*
 - *mail_hover.png*
 - *phone.png*
 - *phone_hover.png*
 - *faq.png*
 - *faq_hover.png*
 - *dropdown*
 - *go-off-record-isolated-btn.png*
 - *go-off-record-isolated-webview-btn.png*
 - *go-on-record-isolated-btn.png*
 - *go-on-record-isolated-webview-btn.png*
 - *icon_clock.png*
 - *icon_email.png*
 - *icon_faq.png*

- icon_phone_call.png
- send-btn.png

Note that the Chat transcript styling HTML is present in `templates\chat\sunburst\transcript\transcript.properties`. For any custom chat transcript styling changes, you can edit the HTML in this file but you must keep all the handlebars variables (enclosed using `{{<var>}}` or `{{{<var>}}}`) intact.

Updating Custom Conditions and Custom Rules in Workflows



Important: Perform this task on the Unified EIM & WIM 11.0(1) services server.

- ▶ The signatures of public APIs `getAttribute()` and `setAttribute()` of `RuleContext.java` have been changed to accommodate new data type of usage links and macros. Now these APIs return `long` value instead of `int`. All custom rules and custom conditions used in workflows need to be analyzed and updated to match this change, and all custom classes must be recompiled. Use `egpl_application_server.jar` available in the `Cisco11.0(1)_Home\service\lib\int` folder on the services server and recompile all the custom classes.

Updating Custom Packages on Web Servers



Important: This section applies only to installations upgrading from Unified EIM & WIM 9.0(1).

- ▶ If you had applied any custom packages on Unified EIM & WIM 9.0(1), you need to reapply them on the Unified EIM & WIM 11.0(1) web servers. Perform this task on all web servers in your deployment. For support, contact Cisco TAC.

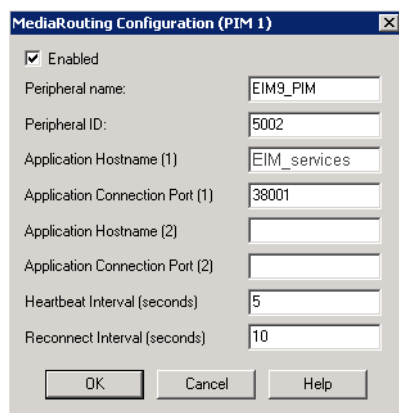
Updating the Application Hostname Configuration in Unified CCE

After the upgrade is complete, you must update the Application Hostname that is configured for the Media Routing Peripheral Interface Manager (MR PIM) associated with Unified EIM & WIM.

To update the application hostname:

1. On any UCCE component server, go to the Cisco Unified CCE Tools folder and open the Peripheral Gateway Setup application.

2. When presented with the Instance Components, select the MR PG associated with the Unified EIM & WIM installation. Click **Edit**.
3. Navigate to the Peripheral Interface Manager properties.
4. Select the PIM associated with Unified EIM & WIM. Click **Edit**.
5. On the configuration screen for the PIM, update the Application Hostname to the hostname of the new Unified EIM & WIM 11.0(1) services server.



Update Application Hostname

6. Ensure that the Application Connection Port configuration is correct.
7. Click **OK**.

Starting Unified EIM & WIM 11.0(1)

To start Unified EIM & WIM 11.0(1):

- ▶ In single-server installations:
 - In the Windows Services panel, start the Cisco Service to start all Cisco services.
- ▶ In a distributed-server installation:

Ensure that all the machines in the configuration are available and connected to the network.

 - a. Start Cisco Service on the messaging server by starting the Cisco Service from the Windows Services panel.
 - b. On the services server, start the application by starting the Cisco Service from the Windows Services panel.
 - c. On each application server, start the application by starting the Cisco Service from the Windows Services panel.

Updating Chat Links

Perform this task only if your Unified EIM & WIM 9 installation included Unified WIM

- ▶ After upgrading from Unified EIM & WIM 9 to Unified EIM & WIM 11.0(1), you will need to update the chat links at all places where you have added the chat links. This includes:
 - On your website where you had added the chat link.
 - In the offers from the Offers Console.

Log in to the Administration Console, and from the Chat Entry Point, copy the new links. For details, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Chat and Collaboration Resources*.

Assigning Licenses to Users

- ▶ If you have acquired licences for new product for Unified EIM & WIM 11.0(1) ([page 17](#)), you will need to assign the new licenses to the users from the Administration Console. For details about doing this task, see the *Cisco Unified Web and E-Mail Interaction Manager Administrator's Guide to Administration Console*.

Adding Aliases to Retriever Instances

Perform this task only if your Unified EIM & WIM 9 installation includes Unified EIM. After running the Upgrader, add the email aliases to the Retriever Service instances on the Unified EIM & WIM 11.0(1) installation.

To add aliases to a retriever instance:

1. Log in to the application as a partition administrator and go to the System Console.
2. In the Tree pane, browse to **System > Partition > *Partition_Name* > Services > Email > Retriever**.
3. In the List pane, select the retriever instance.
4. In the Properties pane, go to the Input tab and select the aliases to be associated with this instance.
5. Click the **Save** button.
6. Stop and start the retriever instance. The retriever picks emails from the alias only after you restart the retriever instance.

Setting up User Desktops

You must clear the web cache and the Java cache before logging in to the application.

To set up user desktops:

1. Ensure that the user desktops meet the requirements outlined in *Hardware and System Software Specification for Cisco Unified Web and E-Mail Interaction Manager*. If you are changing the Internet Explorer on the user desktops, follow the instructions in the *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide*
2. Clear the web browser cache on every user desktop. See the *Cisco Unified Web and E-Mail Interaction Manager Browser Settings Guide* for details.
3. Clear the Java cache on every user desktop by doing the following:
 - a. If you are using 64-bit Internet explorer, Go to **Start > Settings > Control Panel and** double-click **Java**.
 - b. If you are using 32-bit Internet explorer, open the Java Control Panel window by double-clicking the **javacpl.exe** file available at the following location: `C:\Program Files (x86)\Java\jre7\bin.`
 - c. In the Java Control Panel window, on the General tab, in the Temporary Internet Files section, click the **Settings** button.
 - d. In the Temporary Files Settings window, click the **Delete Files** button.
 - e. Click **OK** to close the window.

Cleaning up the Database Servers

Deleting Databases

After upgrading your installation successfully, you can clean up the Unified EIM & WIM 11.0(1) database servers by deleting the following from the database server machines:

- ▶ The following Unified EIM & WIM 11.0(1) databases that were installed while installing Unified EIM & WIM 11.0(1): active database, master database, and archive database or reports database.
- ▶ The user names associated with the following Unified EIM & WIM 11.0(1) databases that were created while installing Unified EIM & WIM 11.0(1): active database, master database, and archive database or reports database.
- ▶ The SQL jobs associated with the following Unified EIM & WIM 11.0(1) databases that were created while installing Unified EIM & WIM 11.0(1): active database, master database, and archive database or reports database. The jobs name for Unified EIM & WIM 11.0(1) will have the Unified EIM & WIM 11.0(1) database names appended to their name.

Troubleshooting Procedures

Viewing Log Files

- ▶ If any error occurs while upgrading the installation, error messages are logged in the following files on the file server:
 - *Cisco_Home\eservice\installation\logs\eg_log_File_Server_Name_upgrade_installer.log*
 - *Cisco_Home\eservice\installation\logs\eg_log_Services_Server_Name_upgrade_installer.log*

Restoring Unified EIM & WIM 11.0(1) Installation

If you encounter any problems while upgrading, you can restore the Unified EIM & WIM 11.0(1) installation and run the Upgrader again.

To restore the Unified EIM & WIM 11.0(1) installation:

- ▶ Restore the Unified EIM & WIM 11.0(1) installation. The backup copies are available at *Cisco_Home\Patches\Backup\Pre_Upgrade_Version\File Server*. Perform this task on the file server and the services server.

Appendix A: Pre-Upgrade Utilities

- ▶ [About the Utilities](#)
- ▶ [Database Pre-Check Utility](#)
- ▶ [Database DBUpdate Utility](#)

About the Utilities

The Upgrader comes with two utilities, DB PreCheck Utility and DBUpdate Utility, that can be run before doing the actual upgrade.



Important: It is highly recommended that you run these utilities before running the actual Upgrader on your installation. Please contact Cisco Support if any issues are identified by these utilities.

- ▶ The **DB PreCheck Utility** checks if there is any data in the databases that will cause the upgrade to fail. If any such issues are found, it logs them in a file. This utility also detects the disk space required on the databases servers to run the upgrader successfully. For details about running this utility, see [“Running DB Pre-Check Utility” on page 45](#). Along with running the **DB PreCheck Utility**, run an additional `verify_actions.sql` script on the active database to identify any actions related discrepancies ([page 47](#)).
- ▶ The **DBUpdate Utility** actually upgrades the standalone copies of the databases and will report if the upgrade can fail because of any database issues. For details about running this utility, see [“Running DBUpdate Utility” on page 55](#).

Database Pre-Check Utility

Preparing to Run the Utility

Installing JDK

- ▶ Install JDK 1.7 Update 2 or higher on the machines from where you are going to run the utilities.

Configuring Database URLs

To be able to run the utility, you have to configure database URLs for the Unified EIM & WIM 9 databases. This section describes the format of these URLs. You will require these URLs while configuring the utilities ([page 45](#)).

Configure URLs for the following databases:

- ▶ Master database
- ▶ Active database
- ▶ Reports database (For installations using Enterprise Edition of MSSQL)
- ▶ Archive database (For installations using Standard Edition of MSSQL)

To configure the database URLs:

The database URLs are configured in the format:

```
jdbc:sqlserver://Server_Name:Port_Number;instanceName=Instance_Name;integratedSecurity=true_or_false;databaseName=Database_Name
```

Where:

- ▶ *Server_Name*: Name of the server where the Unified EIM & WIM 9 databases are installed.
- ▶ *Port_Number*: The port number for the MSSQL server. The default port is 1433.
- ▶ *Instance_Name*: The name of the MSSQL instance for the database. The default instance is `MSSQLSERVER`.
- ▶ `integratedSecurity`: Set the value to `true` if you are using Windows Authentication to connect to the database. Set the value to `false` if you are using the SQL Server Authentication mode.
- ▶ *Database_Name*: Name of the Unified EIM & WIM 9 database.

For example, the database URL will look like:

```
jdbc:sqlserver://productDB:1433;instanceName=mssqlserver;integratedSecurity=true;databaseName=ActiveDB
```

Running DB Pre-Check Utility

This utility needs to be run on the *actual* Unified EIM & WIM 9 databases. The Unified EIM & WIM 9 application does not have to be stopped to run the DB Pre-check utility. You need to have access to the Unified EIM & WIM 9 database servers from the machine you are trying to run this utility.

To run the DB Pre-Check utility:

1. Create a temporary folder, *Temporary_Folder*.
2. From the upgrade files, copy the `Utilities\DBPrecheck\windows-mssql` folder into *Temporary_Folder*.
3. Open the `Temporary_Folder\Utilities\DBPrecheck\windows-mssql\standalone.properties` file in a text editor and set the following properties.
 - `ACTIVE_DATABASE_URL`: Provide the active database URL. For the format of the URL, see [“Configuring Database URLs” on page 48](#).
 - `MASTER_DATABASE_URL`: Provide the master database URL. For the format of the URL, see [“Configuring Database URLs” on page 48](#).

Set the following four properties only if you are using SQL Server Authentication to connect to the active database.

- `ACTIVE_ADMIN_USER`: User name of the database administrator for MSSQL Server. Any database administrator with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
- `ACTIVE_ADMIN_PASS`: Password of the database administrator.
- `ACTIVE_USER`: Database username of the active database.
- `ACTIVE_PASS`: Database password of the active database.

Set the following four properties only if you are using SQL Server Authentication to connect to the master database.

- MASTER_ADMIN_USER: User name of the database administrator for MSSQL Server. Any database administrator with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
- MASTER_ADMIN_PASS: Password of the database administrator.
- MASTER_USER: Database username of the master database.
- MASTER_PASS: Database password of the master database.

Set the following archive database properties only if your installation uses the Standard Edition of MSSQL:



Important: If your installation uses the Enterprise Edition of MSSQL, you must comment out the archive database properties before running the utility. Prefix the property names with “#” to comment them.

- ARCHIVE_DATABASE_URL: Provide the archive database URL. For the format of the URL, see [“Configuring Database URLs” on page 48](#).

Set the following four properties only if you are using SQL Server Authentication to connect to the database.

- ARCHIVE_ADMIN_USER: User name of the database administrator for MSSQL Server. Any database administrator with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
- ARCHIVE_ADMIN_PASS: Password of the database administrator.
- ARCHIVE_USER: Database username of the archive database.
- ARCHIVE_PASS: Database password of the archive database.

Set the following reports database properties only if your installation uses the Enterprise Edition of MSSQL:



Important: If your installation uses the Standard Edition of MSSQL, you must comment out the reports database properties before running the utility. Prefix the property names with “#” to comment them.

- REPORTS_DATABASE_URL: Provide the reports database URL. For the format of the URL, see [“Configuring Database URLs” on page 48](#).

Set the following four properties only if you are using SQL Server Authentication to connect to the database.

- REPORTS_ADMIN_USER: User name of the database administrator for MSSQL Server. Any database administrator with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
- REPORTS_ADMIN_PASS: Password of the database administrator.
- REPORTS_USER: Database username of the reports database.
- REPORTS_PASS: Database password of the reports database.

4. Open the *Temporary_Folder*\Utilities\DBPrecheck\windows-mssql\DBPrecheck.bat file in a text editor and set the following properties:

- Locate the `SET JAVA_HOME` property and set the value to the location where JDK 1.7 Update 2 or higher is installed on your machine ([page 44](#)). For example, `C:/Java/jdk1.7.0_02`.

5. Double-click `DBPrecheck.bat` to launch the utility. You will be notified when the pre-check finishes.

- If the utility fails to execute because of any configuration issues, error messages are logged in the `upgrade_db.log`. Fix the properties configured in the `standalone.properties` and `DBPrecheck.bat` files and try to run the utility again.

- If the DB pre-check utility identifies any issues, all the log messages are logged in the log file `egpl_precheck.log`. Please contact Cisco if any issues are identified by the utility.

The log files are created at the same location from where you launch the utility.

6. From the upgrade files, copy the `Utilities\VerifyActions` folder into *Temporary_Folder*.
7. Run the `Temporary_Folder\Utilities\VerifyActions\verify_actions.sql` script on the Unified EIM & WIM active database to check if there are any actions related data discrepancies in the active database. If the output of the script is `No discrepancy found in actions data`, the information in your active database is okay and you can proceed to the next step. If the output of the script is `Discrepancy found in actions data`, contact Cisco support for assistance.

Database DBUpdate Utility

Preparing to Run the Utility

Installing JDK

- ▶ Install JDK 1.7 Update 2 or higher on the machines from where you are going to run the utilities.

Restoring Databases

The DBUpdate utility should always be run on copies of databases and not on the actual databases for your installation. While restoring the databases on the MSSQL 2012 database server, make sure that edition of MSSQL 2012 database server matches the edition of your MSSQL 2008 database server. For example:

- ▶ If your Unified EIM & WIM 9 installation is using the Enterprise Edition of MSSQL 2008, restore your databases on the Enterprise Edition of MSSQL 2012.
- ▶ If your Unified EIM & WIM 9 installation is using the Standard Edition of MSSQL 2008, restore your databases on the Standard Edition of MSSQL 2012.

To restore the databases:

- ▶ Create a copy of the following databases to be used by the utility:
 - Master database
 - Active Database
 - Reports Database (For installations using Enterprise Edition of MSSQL)
 - Archive Database (For installations using Standard Edition of MSSQL)

Creating Database Users for Unified EIM & WIM Databases

- ▶ Create database users for the restored Unified EIM & WIM 9 databases. This information will be required while running the DBUpdate Utility ([page 55](#)). Scripts and instructions to create the users are available in the upgrade package in the `Utilities\DBUpdate\LoginCreationScripts` folder.

Configuring Database URLs

To be able to run the utility, you have to configure database URLs for the restored databases. This section describes the format of these URLs. You will require these URLs while configuring the utilities ([page 55](#)).

Configure URLs for the following databases:

- ▶ Master database
- ▶ Active database
- ▶ Reports database (For installations using Enterprise Edition of MSSQL)
- ▶ Archive database (For installations using Standard Edition of MSSQL)

To configure the database URLs:

The database URLs are configured in the format:

```
jdbc:sqlserver://Server_Name:Port_Number;instanceName=Instance_Name;integratedSecurity=true_or_false;databaseName=Database_Name
```

Where:

- ▶ *Server_Name*: Name of the server where you have restored the database.
- ▶ *Port_Number*: The port number for the MSSQL server. The default port is 1433.
- ▶ *Instance_Name*: The name of the MSSQL instance used to restore the database. The default instance is **MSSQLSERVER**.
- ▶ **integratedSecurity**: Set the value to **true** if you are using Windows Authentication to connect to the database. Set the value to **false** if you are using the SQL Server Authentication mode.
- ▶ *Database_Name*: Name of the restored database.

For example, the database URL will look like:

```
jdbc:sqlserver://productDB:1433;instanceName=mssqlserver;integratedSecurity=true;databaseName=ActiveDB
```

Configuring Database Link from Active Database to Archive Database



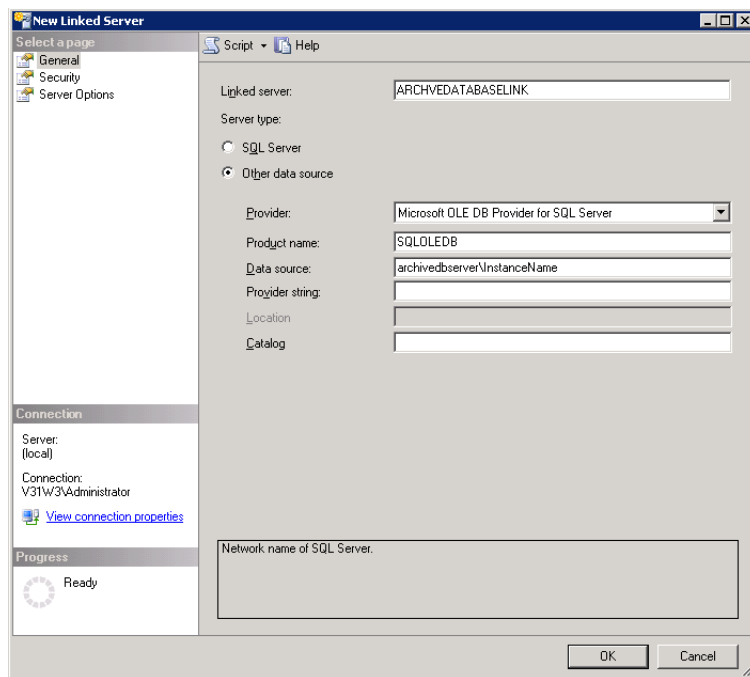
Important: You need to perform these tasks only if the installation uses the Standard Edition of MSSQL and the active and archive databases are restored on different machines.

If you plan to use Windows Authentication for creating these links, you have to setup user accounts and permissions and do some configurations on the database servers. For details about doing these tasks see the following sections in the *Unified EIM & WIM Installation Guide* for – **Setting Up User Accounts and Permissions** and **Configuring Database Servers**.

To configure the database link from the active database to the archive database:

1. Open the SQL Server Management Studio and connect to the server where the active database is restored.
2. In the SQL Server Management Studio window, in the Object Explorer, browse to **Server Objects > Linked Servers**.
3. Right-click on Linked Server and select **New Linked Server**.

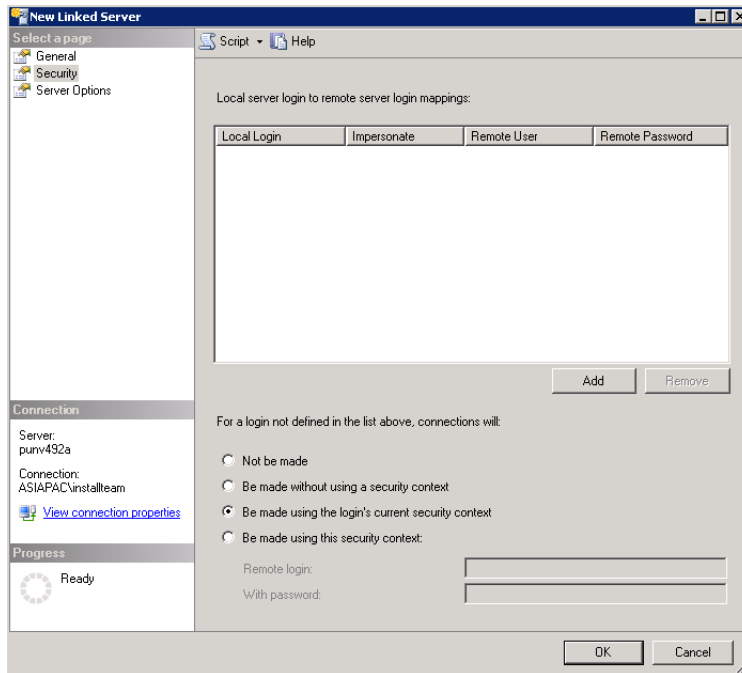
4. In the New Linked Server window, do the following:
 - a. In the General section, provide the following details:
 - **Linked Server:** Provide a name for the link. The link name should not contain any spaces or special characters. This is the link name used while configuring the utility ([page 56](#)).
 - **Provider:** Set the value as **Microsoft OLE DB Provider for SQL Server**.
 - **Product Name:** Set the value as **SQLOLEDB**.
 - **Data Source:** Set the value as *Archive_Database_Server_Name\Instance_Name*. Where *Archive_Database_Server_Name* is the name of the server where archive database is restored. And *Instance_Name* is the name of the MSSQL instance used to restore the archive database. For example, *archivedbserver\myinstance*. If you are using the default instance (*mssqlserver*), then just provide the name of the server. For example, *archivedbserver*.



Set the general properties

- b. In the Security section, provide the following details if you are planning to run the utility with Windows Authentication, or skip to [Step c](#).

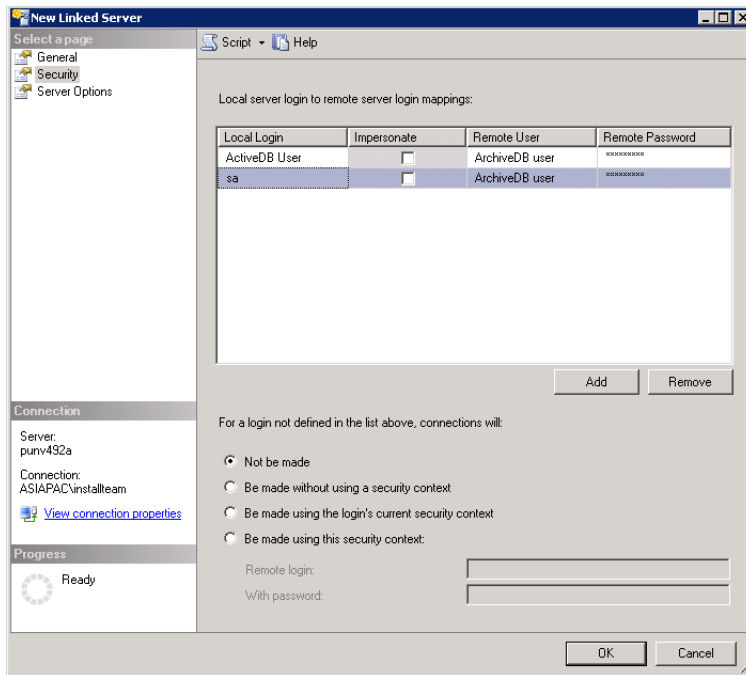
- In the **For a login not defined in the list above, connections will** section, select the **Be made using the login's current security context** option.



Set the security option

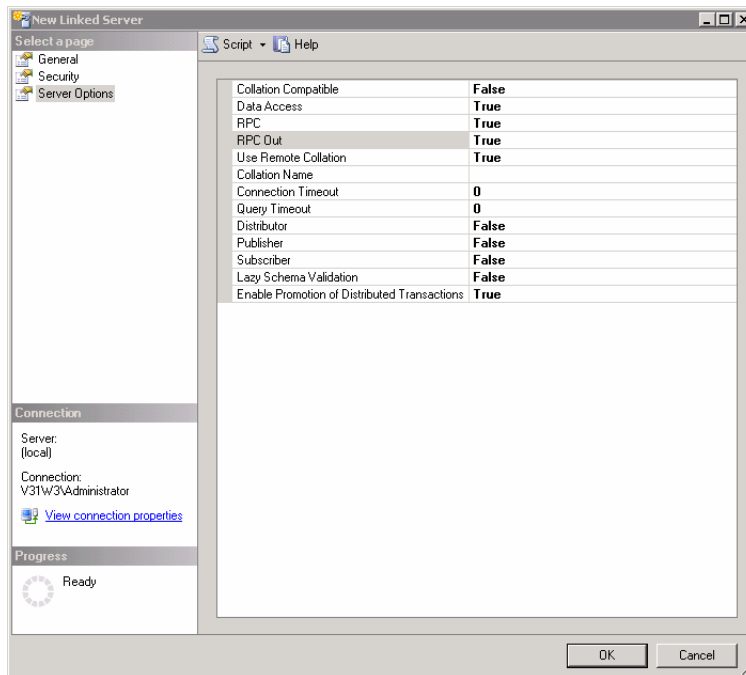
- In the Security section, provide the following details if you are planning to run the utility with SQL Authentication:
 - In the **Local server login to remote server mapping** section, click **Add**.
 - Set the **Local Login** as the active database user name, and the **Remote User** as the archive database user name and **Remote Password** as the archive database user password.
 - Click **Add** again.
 - Set the **Local Login** as the currently logged in **sa** user name, and the **Remote User** as the archive database user name and **Remote Password** as the archive database user password.

- v. In the **For a login not defined in the list above, connections will** section, select the **Not be made** option.



Set the security option

- d. In the Server Options section, set the following:
- **RPC:** Set the value as **true**.
 - **RPC Out:** Set the value as **true**.



Set the server options

- e. Click **OK**.

Configuring Database Link from Reports Database to Active Database



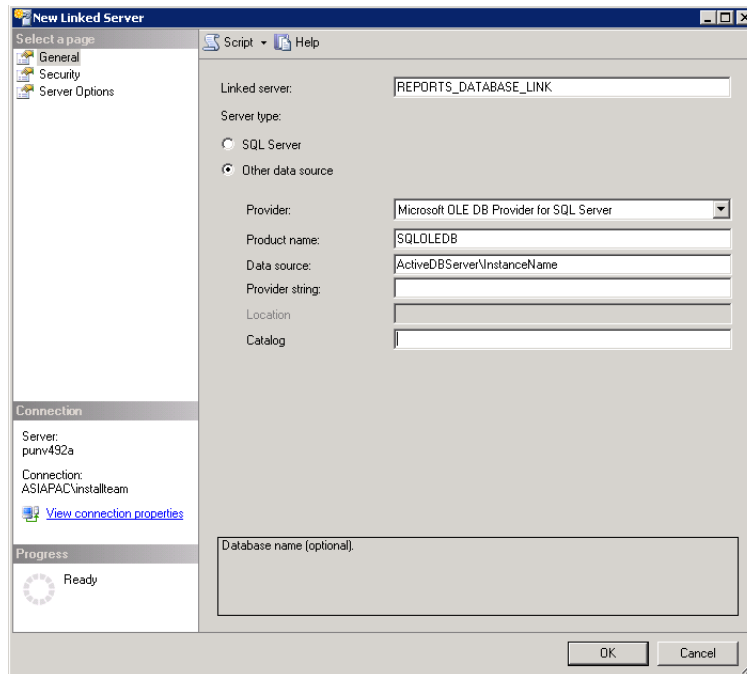
Important: You need to perform these tasks only if the installation uses the Enterprise Edition of **MSSQL** and the active and reports databases are restored on different machines.

If you plan to use Windows Authentication for creating these links, you have to setup user accounts and permissions and do some configurations on the database servers. For details about doing these tasks see the following sections in the *Unified EIM & WIM Installation Guide (Windows-JBoss)* – **Setting Up User Accounts and Permissions** and **Configuring Database Servers**.

To configure the database link from the reports database to the active database:

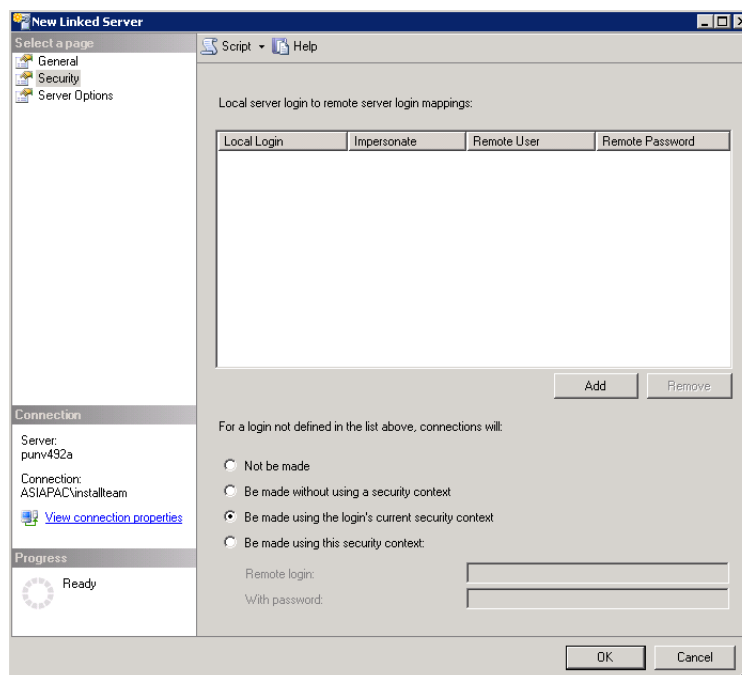
1. Open the SQL Server Management Studio and connect to the server where the Reports database is restored.
2. In the SQL Server Management Studio window, in the Object Explorer, browse to **Server Objects > Linked Servers**.
3. Right-click on Linked Server and select **New Linked Server**.
4. In the New Linked Server window, do the following:
 - a. In the General section, provide the following details:
 - **Linked Server:** Provide a name for the link. The link name should not contain any spaces or special characters. This is the link name used while configuring the utility ([page 56](#)).
 - **Provider:** Set the value as **Microsoft OLE DB Provider for SQL Server**.
 - **Product Name:** Set the value as **SQLOLEDB**.
 - **Data Source:** Set the value as *Active_Database_Server_Name\Instance_Name*. Where *Active_Database_Server_Name* is the name of the server where active database is restored. And *Instance_Name* is the name of the MSSQL instance used to restore the active database. For

example, `activedbserver\myinstance`. If you are using the default instance (`mssqlserver`), then just provide the name of the server. For example, `activedbserver`.



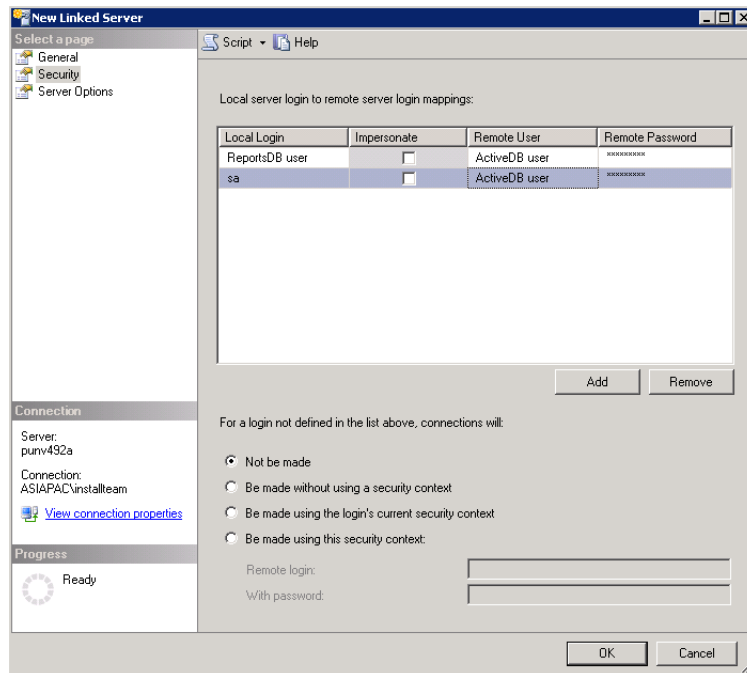
Set the general properties

- b. In the Security section, provide the following details if you are planning to run the utility with Windows Authentication, or skip to [Step c](#).
 - In the **For a login not defined in the list above, connections will** section, select the **Be made using the login's current security context** option.



Set the security option

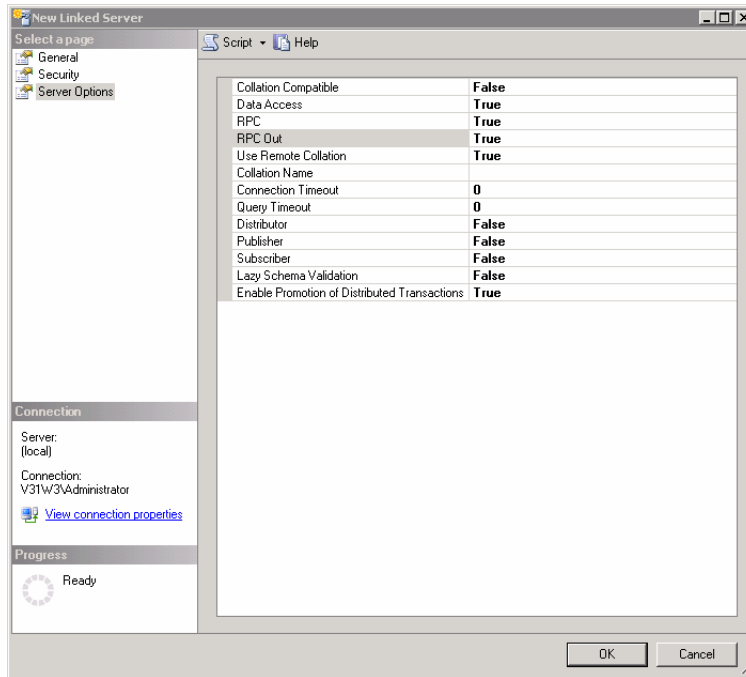
- c. In the Security section, provide the following details if you are planning to run the utility with SQL Authentication:
 - i. In the **Local server login to remote server mapping** section, click **Add**.
 - ii. Set the **Local Login** as the reports database user name, and the **Remote User** as the active database user name and **Remote Password** as the active database user password.
 - iii. Click **Add** again.
 - iv. Set the **Local Login** as the currently logged in **sa** user name, and the **Remote User** as the active database user name and **Remote Password** as the active database user password.
 - v. In the **For a login not defined in the list above, connections will** section, select the **Not be made** option.



Set the security option

- d. In the Server Options section, set the following:
 - **RPC**: Set the value as **true**.

- **RPC Out:** Set the value as **true**.



Set the server details

- e. Click **OK**.

Running DBUpdate Utility

To run the DBUpdate utility:

1. Create a temporary folder, *Temporary_Folder*.
2. From the upgrade files, copy the `Utilities\DBUpdate\windows-mssql` folder into *Temporary_Folder*.
3. Open the `Temporary_Folder\Utilities\DBUpdate\windows-mssql\standalone.properties` file in a text editor and set the following properties:

- `ACTIVE_DATABASE_URL`: Provide the active database URL. For the format of the URL, see [“Configuring Database URLs” on page 48](#).
- `MASTER_DATABASE_URL`: Provide the master database URL. For the format of the URL, see [“Configuring Database URLs” on page 48](#).

Set the following four properties only if you are using SQL Server Authentication to connect to the database.

- `ACTIVE_ADMIN_USER`: User name of the database administrator for MSSQL Server. Any database user with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
- `ACTIVE_ADMIN_PASS`: Password of the database administrator.
- `ACTIVE_USER`: Database username of the active database ([page 47](#)).
- `ACTIVE_PASS`: Database password of the active database.

Set the following four properties only if you are using SQL Server Authentication to connect to the database.

- MASTER_ADMIN_USER: User name of the database administrator for MSSQL Server. Any database administrator with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
- MASTER_ADMIN_PASS: Password of the database administrator.
- MASTER_USER: Database username of the master database ([page 47](#)).
- MASTER_PASS: Database password of the master database.

Set the following reports database properties only if your installation uses the Enterprise Edition of MSSQL:



Important: If your installation uses the Standard Edition of MSSQL, you must comment out the reports database properties before running the utility. Prefix the property names with “#” to comment them.

- REPORTS_DATABASE_URL: Provide the reports database URL. For the format of the URL, see [“Configuring Database URLs” on page 48](#).
- REPORTS_ACTIVE_DB_LINK: Set this property only if the active and reports databases are restored on different machines. Provide the link name configured in [“Configuring Database Link from Reports Database to Active Database” on page 52](#).

Set the following two properties only if you are using SQL Server Authentication to connect to the database.

- REPORTS_ADMIN_USER: User name of the database administrator for MSSQL Server. Any database administrator with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
- REPORTS_ADMIN_PASS: Password of the database administrator.
- REPORTS_USER: Database username of the reports database ([page 47](#)).
- REPORTS_PASS: Database password of the reports database.

Set the following archive database properties only if your installation uses the Standard Edition of MSSQL:



Important: If your installation uses the Enterprise Edition of MSSQL, you must comment out the archive database properties before running the utility. Prefix the property names with “#” to comment them.

- ARCHIVE_DATABASE_URL: Provide the archive database URL. For the format of the URL, see [“Configuring Database URLs” on page 48](#).
- ACTIVE_ARCHIVE_DB_LINK: Set this property only if the active and archive databases are restored on different machines. Provide the link name configured in [“Configuring Database Link from Active Database to Archive Database” on page 48](#).

Set the following four properties only if you are using SQL Server Authentication to connect to the database.

- ARCHIVE_ADMIN_USER: User name of the database administrator for MSSQL Server. Any database administrator with the following roles can be used: `dbcreator`, `securityadmin`, `sysadmin`.
- ARCHIVE_ADMIN_PASS: Password of the database administrator.
- ARCHIVE_USER: Database username of the archive database ([page 47](#)).
- ARCHIVE_PASS: Database password of the archive database.
- SYSTEM_SPECIFIC_PREFIX: Provide a 4 digit numerical value, between 2001 and 9998.
- SYSTEM_SPECIFIC_NAME: Provide a unique name that will be linked directly to the system specific prefix. The length of the name must be between 1 and 4 characters, for example, PROD, PRD1, TEST, TST2, DEMO. Do not use any spaces or special characters.

4. Open the *Temporary_Folder\Utilities\DBUpdate\windows-mssql\DBUpdate.bat* file in a text editor and set the following properties:
 - Locate the `SET JAVA_HOME` property and set the value to the location where JDK 1.7 Update 2 or higher is installed on your machine (page 47). For example, `C:/Java/jdk1.7.0_02`.
5. Double-click `DBUpdate.bat` to launch the utility. You will be notified when the upgrade finishes.
 - If the utility fails to execute because of any configuration issues, error messages are logged in the `upgrade_db.log`. Fix the properties configured in the `standalone.properties` and `DBUpdate.bat` files and try to run the utility again.
 - If the upgrade fails, all the log messages are logged in the log file `upgrade_db.log`. Please contact Cisco if the upgrade fails.

The log files are created at the same location from where you launch the utility.

Appendix B: Check List

Preparing for Upgrade

#	Task	Completed?
1.	Acquire new hardware for installing Unified EIM & WIM 11.0(1) (page 17).	<input type="checkbox"/>
2.	Get new license files from Unified EIM & WIM (page 17). (<i>Required only if you are buying new products or changing number of licences for Unified EIM & WIM 11.0(1)</i>)	<input type="checkbox"/>
3.	Schedule downtime for upgrading (page 13).	<input type="checkbox"/>

Before Scheduled Downtime

#	Task	Completed?
Tasks on Unified EIM & WIM 9 Installation		
1.	Check Unified EIM & WIM 9 version to make sure it is supported for upgrade. (page 17).	<input type="checkbox"/>
2.	Run the DB PreCheck Utility. It identifies any data and DB schema related issues that may cause the upgrade to fail (page 44).	<input type="checkbox"/>
3.	Run the <code>verify_actions.sql</code> script on the Unified EIM & WIM active database to check if there are any actions related data discrepancies. (page 22).	<input type="checkbox"/>
4.	Check the status of the report summarization job to make sure it is up to date (page 21).	<input type="checkbox"/>
Tasks on a Windows 2012 Machine With SQL Server 2012		
1.	Create a back-up of the Unified EIM & WIM 9 databases and restore them for running the DBUpdate utility (page 47).	<input type="checkbox"/>
2.	Run the DBUpdate Utility. It upgrades the restored Unified EIM & WIM 9 databases and identifies any issues that can cause the upgrade to fail (page 55).	<input type="checkbox"/>

#	Task	Completed?
Tasks on New Hardware for Unified EIM & WIM 11.0(1) installation		
1.	Install Unified EIM & WIM 11.0(1) (page 18). While installing Unified EIM & WIM 11.0(1), the following should exactly match the Unified EIM & WIM 9 installation: <ul style="list-style-type: none"> ▶ Deployment model (For exceptions, refer page 18) ▶ Database collation setting ▶ Context root name ▶ Partition name 	<input type="checkbox"/>
2.	Run the CheckTopology utility to verify if there are any topology mismatches between the Unified EIM & WIM 9 and Unified EIM & WIM 11.0(1) machines. (page 19) <ul style="list-style-type: none"> ▶ Note: This utility can be run from any machine that has access to the Unified EIM & WIM 9 and Unified EIM & WIM 11.0(1) master databases. 	<input type="checkbox"/>
3.	Take a back-up of the Unified EIM & WIM 11.0(1) installation folder on the following servers: <ul style="list-style-type: none"> ▶ File server ▶ Services server ▶ Application server ▶ Web servers 	<input type="checkbox"/>
4.	Copy the storage, reports history, and chatbot reporter folders from the Unified EIM & WIM 9 file server to the Unified EIM & WIM 11.0(1) file server. Make a note of the timestamp of the most recently updated files in each of these folders (page 24).	<input type="checkbox"/>

During Scheduled Downtime

#	Task	Completed?
Tasks on Unified EIM & WIM 9 Installation		
1.	Remove aliases from the Retriever Instance (page 22) (<i>Applies to installations using Unified EIM</i>).	<input type="checkbox"/>
2.	Stop the Unified EIM & WIM 9 application. (page 23). On the services server machine, from the Windows Task Manager verify that none of the javaw and java processes (the services) are running.	<input type="checkbox"/>
3.	Copy the EAR from the Unified EIM & WIM 9 file server to the Unified EIM & WIM 11.0(1) file server. (page 23).	<input type="checkbox"/>
4.	Copy license files from the Unified EIM & WIM 9 file server to the Unified EIM & WIM 11.0(1) file server. (page 24)	<input type="checkbox"/>

#	Task	Completed?
5.	Verify all the latest contents of the storage, reports history, and chatbot reporter folders have been copied from the Unified EIM & WIM 9 file server to the Unified EIM & WIM 11.0(1) file server (page 23).	<input type="checkbox"/>
6.	Copy the lib folder from the Unified EIM & WIM 9 services server to the Unified EIM & WIM 11.0(1) services server (page 24).	<input type="checkbox"/>
7.	Copy the index folder from the Unified EIM & WIM 9 application server to the Unified EIM & WIM 11.0(1) application server (page 25).	<input type="checkbox"/>
8.	Copy custom templates folders from the Unified EIM & WIM 9 web servers to the Unified EIM & WIM 11.0(1) web servers (page 25)	<input type="checkbox"/>
9.	Copy the custom web folder from the Unified EIM & WIM 9.0(2) web servers to the Unified EIM & WIM 11.0(1) web servers (page 25). Note: For installations upgrading from Unified EIM & WIM 9.0(1), <i>do not</i> copy the custom folder to the Unified EIM & WIM 11.0(1) web server.	<input type="checkbox"/>
10.	Create a back-up of the Unified EIM & WIM 9 databases for the upgrade.	<input type="checkbox"/>
Tasks on Unified EIM & WIM 11.0(1) installation machines		
1.	Stop the application on the Unified EIM & WIM 11.0(1) servers. (page 23). On the services server machine, from the Windows Task Manager verify that none of the javaw and java processes (the services) are running.	<input type="checkbox"/>
2.	Restore the Unified EIM & WIM 9 databases on the respective Unified EIM & WIM 11.0(1) database machines. (page 26).	<input type="checkbox"/>
3.	Run the upgrader on the Unified EIM & WIM 11.0(1) file server (page 27).	<input type="checkbox"/>
4.	Run the upgrader on the Unified EIM & WIM 11.0(1) services server. (page 27).	<input type="checkbox"/>
5.	Use the CreateIndexView utility to check the status of the Index Creation job (page 36).	<input type="checkbox"/>
6.	Chat templates: Merge files from the Unified EIM & WIM 11.0(1) templates with your custom templates to use new Unified EIM & WIM 11.0(1) features (page 36) (<i>Applies to installations using Unified WIM</i>).	<input type="checkbox"/>
7.	Update custom conditions and custom rules in workflows (page 38).	<input type="checkbox"/>
8.	Update the application hostname configuration in Unified CCE (page 38)	
9.	Start the application on Unified EIM & WIM 11.0(1) (page 39).	<input type="checkbox"/>
10.	Update the chat links (page 40) on your website (<i>Applies only if web server names are used on websites</i>).	<input type="checkbox"/>
11.	Add the aliases to the Retriever instance (page 40). (<i>Applies to installations using Unified EIM</i>).	<input type="checkbox"/>
12.	Assign licenses to users (page 40). (<i>Applies only if you bought new products.</i>)	<input type="checkbox"/>