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SpeechMiner Upgrade Guide

Upgrade SpeechMiner from any Version to 8.5.507

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This document explains how to upgrade SpeechMiner from any version to version 8.5.507.

Pre-upgrade Requirements

- Request the most recent release of the target software version from your Genesys representative.

- Request the SpeechMiner license from Genesys Licensing.

- Verify that the following are installed:

    - Microsoft .NET Framework 3.5 SP1 must be installed on all machines that will run SpeechMiner components or interact with SpeechMiner.
      .net 3.5 Service Pack 1 contains many new features building incrementally upon .NET Framework 2.0, 3.0, 3.5, and includes cumulative servicing
      updates to the .NET Framework 2.0 and .NET Framework 3.0 subcomponents.   You can download the installation package at:
        http://www.microsoft.com/en-us/download/details.aspx?id=22.

    - Microsoft .NET Framework 4.5 SP1 (4.5.1) must be installed on all machines that will run SpeechMiner components or interact with SpeechMiner.
        You can download the installation package at:
        http://www.microsoft.com/en-us/download/details.aspx?id=40773.

    - Microsoft Visual C++ 2013 Redistributable must be installed on all machines that will run SpeechMiner components or interact with SpeechMiner.
        You can download the installation package at:
        http://www.microsoft.com/en-us/download/details.aspx?id=40784.

- When upgrading to a later build for the same version, SMUpgrade is not required. Contact Genesys Customer Care to verify if you need an SQL script for the specific upgrade.

Upgrade Checklist

The following checklist summarizes all the procedures required for upgrading SpeechMiner. Make sure to complete all of the required procedures.

Item to Check	Details
Storage Requirements	To successfully complete the upgrade process, the data partition in the SQL server must have available disk space. The minimum required storage for the upgrade should be twice the size of the production database .mdf file.

Item to Check	Details
Check for Customization	If any customizations were implemented on your DB, make sure that they are part of the new version, or that they can be used in the new version without changes. Contact Genesys Customer Care for assistance.
Licensing	As of 8.5.504.02 you only need one license for SpeechMiner. Before attempting an upgrade, contact the Genesys Licensing Team for assistance and an updated license.

Rollback Plan

To ensure that you can revert back to your current SpeechMiner version, back up your current version's database and data folders (`index`, `grammars`, etc.).

For detailed information about the folders you should back up, refer to Required Folders

Since your current DB and data folders are saved and available, back-out steps are not required if problems arise with the upgrade process before you uninstall your current version. Your current system should still be configured and functional.

After you uninstall your current SpeechMiner version and install your target SpeechMiner version, the only way to revert back to your current version is to uninstall the target version, reinstall your current version, restore the database and data folders from backup, and update the config files using SMConfig.

Upgrade Procedure

Important

You must test SMUpgrade and backup your database before you begin the upgrade procedure. Create a backup of your database, place it on a separate system and perform all the upgrade steps to verify that the process works properly.

1. Disable Database Mirroring for the duration of the upgrade to enable the procedure to run faster.

2. Using `SMConfig->Services->Stop Services`, stop your current system. In addition, stop the Interaction Receiver and SpeechMiner Application Pools if they exist.
   The Interaction Receiver Application Pool only exists if you have recording and the SpeechMiner Application Pool only exists on web servers.

3. Create a backup copy of the source DB.

> ## Important
>
> These steps are necessary because the schema will be changed from your current version to the target version. It is important to back up the previous version in case of issues that may arise with the upgrade process.

4. Install and run SMUpgrade to upgrade your database from your current version's DB to the target version's DB as follows:

Prerequisites:

- Before upgrading to 8.5.507.01, verify that members are not included in the Utopy and Reports roles. If members are included in these two roles, remove them from the roles.

- Verify that you are working with **English US** localization settings. You can not upgrade using localization settings that are not English US.

- Install .NET 4.6.2. For additional information refer to Installing the .NET Framework.

- When upgrading a large database, make sure that the hard drive that hosts the target database has enough storage space. The minimum required storage for the Upgrade procedure should be twice the size of the production database .mdf file.

- Contact Genesys Customer Care to receive the scripts required to perform the upgrade procedure. Allow for one week to receive the scripts along with instructions about how to use them.

If you are upgrading from 8.5.506.01 GA (build 58) to 8.5.507.01 GA (build 122), you do not have to contact Customer Care since the scripts are included in the installation.

Usage

a. Verify that your recovery model is either `Simple` or `Bulk-logged`. To determine which recovery model you have, right click db `> properties > options > recovery model`.

b. Use the SpeechMiner Installer to install the SMUpgrade component. It is recommended to install and run the SMUpgrade component on the SQL server.

c. Configure the following in the `\utopy\tools\bin\release\SMUpgrade.exe.config` file:
You can change the LogFile location. The default LogFile location is in the same folder as the `SMUpgrade.exe.config` file.

```
 <connectionStrings>
 <add name="SQLServer"
connectionString="server=[SERVER];uid=[USER];pwd=[PASSWORD];database=[DB
NAME]" />
 </connectionStrings>
 <appSettings>
    <add key="ScriptsFolder" value="..\..\UpgradeScripts" />
    <add key="LogFile" value=".\SMUpgradeLog" />
    <add key="ClientSettingsProvider.ServiceUri" value="" />
    <add key="MasterPassword" value="" />
 </appSettings>
```

Important

- It is highly recommended to use the sa credentials.
  The user account must belong to the db_owner role in the
  target database. By default, the DBUser includes the
  db_owner role.

- If you are encrypting audio when upgrading to 8.5.5 or
  later, you must set and remember the Master password.
  For details, see the **Using the SMConfig to Configure
  SpeechMiner** section in the *SpeechMiner Administration
  Guide*.

- Verify that the Script folder points to the folder you
  received from Genesys Customer Care. By default the
  Script folder is as it appears in the *ScriptFolder* line above.

- Verify that the user who is running SMUpgrade has
  permissions to edit the Scripts folder.

d. Run SMUpgrade.exe from a Command Line as an Administrator.

Important

The SMUpgrade process will trigger a reindex of all of the
interactions stored in your system, if your SpeechMiner
source version is before version 8.5.503.

e. When you are asked if you are sure you want to continue, answer **yes**.

f. Verify that the database and versions specified in this step are correct.
When you are asked if you are sure you want to upgrade the database
from your current version to the target version, answer **yes**.

Important

- At this point the Upgrade process begins. The process should complete with Return Code 0.

- All messages are written to the file that starts with the name specified in 4c, followed by a time stamp.

- If for some reason, the Upgrade process could not open in the Log file the messages will only be written in the Console.

- The Upgrade process can fail before or after the database was changed. If the process failed before the database was changed, solve the cause and run the Upgrade procedure again. If the process failed after the database was changed, the database was only partly changed and SMUpgrade will attempt to create a recovery point (that is, the point from which the Upgrade process can continue). If a recovery point is created, verify at what point the procedure failed, determine the cause and run SMUpgrade again (note: at this point you will be asked whether you want to run the SMUpgrade from the recovery point or from the beginning). If a recovery point is not created, rollback to the previous database and determine the problem before beginning the process again.

- If the Upgrade process failed during the Schema upgrade or during the data upgrade, SMUpgrade will create the remaining SQL script and save it in a file in the Script folder under the Data or Schema folders. The name of the script file will be identical to the name of the script SMUpgrade ran with an .rest.sql suffix. If you decide to run SMUpgrade from the recovery point, SMUpgrade will use this file to upgrade.

    g. Continue with the upgrade instructions below.

5. Optional: Uninstall your current version from all servers. The two versions (your current version and the target version) cannot be running side by side at the same time. Only one version can be registered as the active SpeechMiner service on each server. The installation binaries can be left on the server.

6. Install the target version platform on all servers.

7. Install the target version Web on the Web server.

8. Install the target version SMART on users' desktops, as required.

9. If you are working with Genesys Interaction Recording (GIR), create new configuration objects:

> ### Important
> If you are upgrading from 8.5.505 you do not have to perform this step. Go directly to step 10.

   a. Use Genesys Administrator Extension to create an additional new Application Template:

      a. Import the following template from the SpeechMiner CD:

         • `Speechminer_node.apd`

      b. Verify that the template has `Genesys Generic Client` in the **Type** field.

   b. Create three new Application objects using the **Speechminer_node Application** template.

      a. In the **Name** field, enter the name of each application object. The three new Application objects should be named as follows (where <XXX> is the same as the name set in the SMConfig's Recording panel):

         • `<XXX>_Platform_Node`

         • `<XXX>_InteractionReceiver_Node`

         • `<XXX>_Web_Node`

      b. Create a connection for each Application object to the Server application with the similar name. For example, for *Speechminer_Web_Node* use the name *Speechminer_Web*.

10. Start SMART and perform the following:

   a. Right-click on each active Program icon and choose `Activate program`.

   b. Run the following SQL code in order to force apply of all the topics:
      `update smartTopicTbl set saveDate = dbo.time2tod(GETUTCDATE()) where version = 0`

   c. Click the `Apply` button.

   d. In the new `Apply` popup window, choose `Apply all`.

   e. Click the `Apply` button.

11. Run SMConfig

   .

> ### Important
> If your database was restored from a backup file, you may need to "fix" an orphan dbuser. To do this, simply run EXEC sp_change_users_login 'Auto_Fix', 'dbuser'.

   a. Configure the Sites & Machines panel as necessary, and save the changes. Make sure you save this panel even if you have not made any changes.

   b. Configure the Services panel and save the changes. Do not start any of the services.

    c. Configure the Index panel and save the changes.

    d. In the Reports panel, update the `MRSLibrary.dll` on the report server.

    e. Deploy the reports to the report server.

    f. In the Recording panel (relevant only if your are working with GIR), set the Configuration Server username and password if you are not using the Genesys supplied "default" user.

    g. Using SMConfig, start the `UPlatform` services on all the servers.

8. Open the SpeechMiner web-based interface and test the functionality.

9. If Database Mirroring was enabled and you disabled it at the beginning of this procedure, enable Database Mirroring.