



## **Cisco SocialMiner Installation and Upgrade Guide Release 12.0(1)**

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## Preface

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## Change History

Change	See	Date
Initial Release of Document for Release 12.0(1)		January 2019
Updated the Upgrade Overview section		

## Audience

This guide is intended for Cisco SocialMiner system administrators.

## Documentation and Support

To download documentation, submit a service request, and find additional information, see *What's New in Cisco Product Documentation* at: <https://www.cisco.com/en/US/docs/general/whatsnew/whatsnew.html>.

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## CHAPTER 1

# System Requirements

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- [System Requirements, on page 1](#)

## System Requirements

For information about system requirement, see [https://www.cisco.com/c/dam/en/us/td/docs/voice\\_ip\\_comm/uc\\_system/virtualization/virtualization-cisco-socialminer.html](https://www.cisco.com/c/dam/en/us/td/docs/voice_ip_comm/uc_system/virtualization/virtualization-cisco-socialminer.html).







## CHAPTER 2

# SocialMiner Installation

SocialMiner is installed as an appliance using the Cisco Unified Communications Operating System (Unified OS). The operating system and the SocialMiner application are installed together using a similar installation process as other Unified OS products such as Cisco Unified Communications Manager and Cisco Unified Intelligence Center.

SocialMiner operates on a VMware Virtual Machine (VM) on hardware that is running a VMware Host Server. SocialMiner currently supports installation of only a single node (as opposed to a duplexed or redundant system).



**Note** Cisco does not support changing the hostname or IP address on any server once they have been set.

By default, access to SocialMiner administration user interface is restricted. Administrator can provide access by whitelisting client's IP addresses and revoke by removing the client's IP from the whitelist.

For more information, see [Control SocialMiner Application Access, on page 4](#). This section provides the CLI commands to manage the whitelisted IP addresses.

- [Install SocialMiner, on page 3](#)
- [Control SocialMiner Application Access, on page 4](#)
- [Additional Configuration Options, on page 6](#)

## Install SocialMiner

Perform the following steps to install SocialMiner:

### Procedure

**Step 1** Create a virtual machine using a VMware Open Virtual Format template.

**Step 2** Use the respective version specific OVA template for the fresh installation of SocialMiner.

**Note** Ensure that Cisco SocialMiner OVA template is deployed for a successful install. The install stops if no Cisco SocialMiner OVA template is found in the deployment.

- a) Go to <https://software.cisco.com/download/type.html?mdfid=283613136&flowid=73189> and download this template.

The Cisco SocialMiner version specific Virtual Server Template (OVA) defines a virtual machine configuration that is supported in the respective SocialMiner release version. This OVA contains all supported virtual machine configurations of this release.

- Step 3** When deploying the template, select either a large or a small deployment from the drop-down list.
- Step 4** Mount the SocialMiner DVD or ISO file to the virtual machine and set the virtual machine to boot from the SocialMiner DVD. The installation wizard opens. Use Tab to navigate between elements and then press the space bar or the Enter key to select the element and proceed.
- Step 5** Perform the media check when prompted.
- Step 6** Follow the instructions on the screen and select **Yes** or **Continue**.
- Step 7** Use the arrow keys to highlight the correct time zone and then use Tab to navigate to the **OK** button. Press **Enter** to proceed.
- Step 8** Provide the network information for SocialMiner. You must provide valid hostname with matching IP address. The system confirms that the hostname matches the IP address later in the installation process.
- Step 9** Select **Yes** to provide DNS Client Settings for SocialMiner. Provide DNS servers and the domain. Select **OK**.
- Step 10** Provide an Administrator ID and password. This credentials is for platform (Unified OS) administration.
- Step 11** Provide information about your organization. This information generates the security (SSL) certificates for this server.
- Step 12** You must provide at least one NTP Server. Enter the NTP host address and select **OK**.
- Step 13** Provide a security password.
- Step 14** Provide a username and password for the SocialMiner administrator. You can import additional SocialMiner users from Active Directory after the SocialMiner installation is complete.
- Step 15** The confirmation window opens. You can select **Back** to change settings or **OK** to complete the installation. Installation can take up to two hours. The server may reboot to complete the installation steps. If you install from an ISO file and see the virtual machine message to "Disconnect anyway (and override the lock)?", select **Yes**.
- A sign-in prompt appears on the server console.
- Step 16** After the installation is complete, perform the one-time setup tasks listed in [Additional Configuration Options, on page 6](#).

## Control SocialMiner Application Access

By default, access to SocialMiner administration user interface is restricted. Administrator can provide access by whitelisting client's IP addresses and revoke by removing the client's IP from the whitelist. For any modification to whitelist to take effect, Cisco Tomcat must be restarted.



**Note** IP address range and subnet masks are not supported.

## utils whitelist admin\_ui list

This command displays all the whitelisted IP addresses. This list is used to authorize the source of the incoming requests.

### Syntax

```
utils whitelist admin_ui list
```

### Example

```
admin: utils whitelist admin_ui list

Admin UI whitelist is:
10.232.20.31
10.232.20.32
10.232.20.33
10.232.20.34
```

## utils whitelist admin\_ui add

This command adds the provided IP address to the whitelisted addresses.

### Syntax

```
utils whitelist admin_ui add
```

### Example

```
admin:utils whitelist admin_ui add 10.232.20.33

Successfully added IP: 10.232.20.33 to the whitelist

Restart Cisco Tomcat for the changes to take effect
```

## utils whitelist admin\_ui delete

This command deletes the provided IP address from the whitelist.

### Syntax

```
utils whitelist admin_ui delete
```

### Example

```
admin:utils whitelist admin_ui delete 10.232.20.34

Successfully deleted IP: 10.232.20.34 from the whitelist
```

```
Restart Cisco Tomcat for the changes to take effect
```

## Additional Configuration Options

### Procedure

---

- Step 1** If your system is installed behind a firewall, set up an HTTP proxy so that feeds can access sites on the Internet.
  - Step 2** Configure Active Directory so that additional users can sign in.
  - Step 3** If you want to use Cisco Unified Intelligence Center, set up the reporting user so that the reporting tool can access the reporting database.
-



## CHAPTER 3

# Important Considerations for Upgrade

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- Perform a DRS backup before you upgrade.
- Upgrade SocialMiner during off-peak hours or during a maintenance window to avoid service interruptions.
- You can trigger the switch to new version immediately after you complete the upgrade.
- You might experience a delay of approximately 10-15 minutes before the services start during the first boot of the SocialMiner system after the switch version. This is due to the migration of data during the first boot. This delay will not occur in subsequent restarts.
- You can choose to switch back to the older version at time if the newer version seems unstable or has performance issues. No data is migrated when you switch to the older version.
- [Upgrade Overview, on page 7](#)
- [Upgrade Tasks, on page 8](#)

## Upgrade Overview

SocialMiner Release 12.0(1) supports the following upgrade paths:

- From SocialMiner Release 10.0(1) to Release 12.0(1)
- From SocialMiner Release 10.5(1) to Release 12.0(1)
- From SocialMiner Release 10.6(1) to Release 12.0(1)
- From SocialMiner Release 11.0(1) to Release 12.0(1)
- From SocialMiner Release 11.5(1) to Release 12.0(1)
- From SocialMiner Release 11.6(1) to Release 11.6.(2)
- From SocialMiner Release 11.6(2) to Release 12.0(1)



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**Note** Ensure that Cisco SocialMiner OVA template is deployed for a successful upgrade. The upgrade stops if no Cisco SocialMiner OVA template is found in the deployment.

---

Before you begin upgrade, you must install the upgrade Cisco Options Package (COP) file and then upgrade SocialMiner using the Software Upgrades menu option in Unified OS Administration or by using the CLI.

The upgrade runs unattended and may take over two hours.

During the upgrade, multiple reboots occur. After the upgrade is complete, the system boots from the lower version. You can defer the switch to new version to a maintenance window or you can perform it immediately. To switch to the higher version, you need to trigger Switch Version either from the Unified OS Administration or from the CLI.



**Note** Before you upgrade, you must perform a DRS backup to ensure that you can revert to the previous version if necessary.

### COP File for Upgrade

The following table lists the SocialMiner version and the corresponding COP file that you have to download and install before you begin the upgrade.

*Table 1: COP File*

Version	COP File
10.0.1.10000-9	ciscosm-refresh_upgrade-10.0.1.10000-9.cop.sgn
10.5.1.10000-6	ciscosm-refresh_upgrade-10.5.1.10000-6.cop.sgn
10.6.1.10000-102	ciscosm-refresh_upgrade-10.6.1.10000-102.cop.sgn

## Upgrade Tasks

The following table lists the required tasks to upgrade SocialMiner Release 10.x to Release 12.0(1).

Upgrade Path	Tasks
10.x to 12.0(1).	<ol style="list-style-type: none"> <li>1. <a href="#">Install COP File, on page 9</a></li> <li>2. <a href="#">Update Virtual Machine Settings, on page 9</a></li> <li>3. <a href="#">Upgrade SocialMiner Using Cisco Unified OS Administration, on page 10</a> or <a href="#">Upgrade SocialMiner Using the CLI, on page 11</a></li> <li>4. <a href="#">Verify Version after Switch Version, on page 11</a></li> <li>5. <a href="#">Verify Version, on page 12</a></li> </ol>

The following table lists the required steps to upgrade from SocialMiner Release 10.6(2)/11.x to Release 12.0(1).

Upgrade Path	Tasks
10.6(2)/11.x to 12.0(1).	<ol style="list-style-type: none"> <li>1. <a href="#">Update Virtual Machine Settings, on page 9</a></li> <li>2. <a href="#">Upgrade SocialMiner Using Cisco Unified OS Administration, on page 10</a> or <a href="#">Upgrade SocialMiner Using the CLI, on page 11</a></li> <li>3. <a href="#">Verify Version after Switch Version, on page 11</a></li> <li>4. <a href="#">Verify Version, on page 12</a></li> </ol>

## Update Virtual Machine Settings

Before you perform a upgrade, you must modify SocialMiner Virtual Machine's operating system version, total video memory.

### Procedure

- 
- Step 1** Power off the virtual machine.
- Step 2** Change the operating system version to **CentOS**. Perform the following steps to change the operating system of the virtual machine:
- a) Right click on the virtual machine and then choose **Edit Settings**.  
The **Virtual Machine Properties** window appears.
  - b) In the **Options** tab, select **General Options** and choose **CentOS** from the **Version** drop-down list.
  - c) Click **OK**.
- Step 3** Increase the total video memory to 8 MB. Perform the following steps to increase the total video memory:
- a) Right click on the virtual machine and then choose **Edit Settings**.  
The **Virtual Machine Properties** window appears.
  - b) In the **Hardware** tab, select **Video card**.
  - c) In the **Specify custom settings**, set **Total video memory** to 8 MB and then click **OK**.
- Step 4** Power on the virtual machine and continue with upgrade.

**Note** For a refresh upgrade (RU) of Cisco SocialMiner you must initiate the upgrade from the VM console. A confirmation message related to **Cisco SocialMiner OVA deployment confirmation** is displayed. The Administrator must press **Yes** to proceed for the refresh upgrade to continue.

---

## Install COP File

The Cisco Options Package (COP) file provides a generic method to deploy Cisco software outside the normal upgrade process. For example, you use a COP file to install new language packs or to patch fixes and virtualization tools. You must first download and save the COP file before applying it.




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**Note** Unlike upgrades, COP files cannot be removed or rolled back. Contact Cisco TAC if you want to roll back the COP file.

---




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**Note** If the ReadMe file for a specific COP file contradicts the following general guidelines, follow the instructions in the ReadMe file.

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### Procedure

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- Step 1** Go to <https://software.cisco.com/download/navigator.html>.
  - Step 2** Click **Log In** and login by entering username and password.
  - Step 3** Choose from the list **Products > Customer Collaboration > Options for Contact Center Solutions > SocialMiner**.
  - Step 4** Click **SocialMiner Software**.
  - Step 5** Choose the required current version of the file from the list and download the COP file to a local source or an SFTP server that can be accessed by the Cisco SocialMiner server.
  - Step 6** Apply the file using the procedure [Upgrade SocialMiner Using the CLI, on page 11](#).
  - Step 7** Enter the command **utils system restart** to restart the server.
- 

## Upgrade SocialMiner Using Cisco Unified OS Administration

You can upgrade SocialMiner either from a local DVD or from a FTP/SFTP server.

### Procedure

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- Step 1** Open Unified OS Administration from the **Administration tab > Platform Administration** or access the URL **https://<servername>/cmplatform**, where <servername> is the hostname or IP address of your SocialMiner server.
- Step 2** Log in to **Cisco Unified OS Administration** using administrator username and password.
- Step 3** Choose **Software Upgrades > Install/Upgrade**.
- Step 4** From the **Source** list, choose either **DVD** or **Remote Filesystem**.
- Step 5** Enter the path of the upgrade file in the **Directory** field.  
For **DVD**, enter "/" in the filepath.  
For **Remote Filesystem**, enter the full path to the file that is located on the remote server.
- Step 6** If you chose **Remote Filesystem**, follow the instructions on the screen; otherwise, go to **Step 7**.
- Step 7** Click **Next** to see the list of upgrades that are available.
- Step 8** Choose the appropriate upgrade file, and click **Next**.



- Step 9** (Optional) To use the Email Notification feature, enter relevant information in the **Email Destination** and **SMTP server** fields.
- Step 10** Click **Next** to initiate the upgrade process.
- 

## Upgrade SocialMiner Using the CLI

### Procedure

---

- Step 1** Log in to platform application CLI using the administrator username and password.
- Step 2** Enter the command **show version active** and check the current version.
- Step 3** Enter the command **utils system upgrade initiate** to initiate the upgrade process.
- Step 4** From the **Source** list, choose either **DVD** or **Remote Filesystem**.
- Step 5** Enter the path of the upgrade file in the **Directory** field.
- For **DVD**, enter "/" in the filepath.
- For **Remote Filesystem**, enter the full path to the file that is located on the remote server.
- Step 6** Follow the instructions on the screen.
- Your entries are validated and the available files list is displayed.
- Step 7** Select the ISO image file or the COP file that you want to apply from the available list, and confirm the installation when you are prompted.
- Step 8** After the installation is completed, enter the command **show version inactive** and check the upgraded version.
- 

## Verify Version after Switch Version

You can check and perform switch version by using either of the following procedures: [Switch Version Using the Web Interface, on page 11](#) or [Switch Version Using the CLI, on page 12](#).



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**Caution** Never initiate switch version from the recovery CD.

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- Note**
- Perform switch version in the same maintenance window to avoid additional downtime.
  - The time required for switch version depends on the size of records in the database.
- 

## Switch Version Using the Web Interface

To check and perform switch version using the web interface, follow this procedure:

**Procedure**

- 
- Step 1** Log in to **Cisco Unified OS Administration** using the administrator username and password.
  - Step 2** Choose **Settings > Version** to check the versions.
  - Step 3** Click **Switch Versions**, and click **OK** to initiate the switch version process.
  - Step 4** Choose **Settings > Version** to check the active version.
- 

**Switch Version Using the CLI**

To check and perform switch version using the CLI, follow this procedure:

**Procedure**

- 
- Step 1** Log in to Cisco Unified Communications OS Platform CLI using the administrator username and password.
  - Step 2** Enter the command **show version active** to check the active version.
  - Step 3** Enter the command **show version inactive** to check the inactive version.
  - Step 4** Enter the command **utils system switch-version** to initiate the switch version process.
  - Step 5** Enter the command **show version active** to check the active version.

**Note** If switch version is unsuccessful, contact Cisco TAC.

---

**Verify Version****Verify Version Using the Web Interface**

To verify the active and inactive versions of SocialMiner using the web interface, follow this procedure:

**Procedure**

- 
- Step 1** Log in to **Cisco Unified OS Administration** using the administrator username and password.
  - Step 2** Choose **Settings > Version** to check the current active and inactive versions.
- 

**Verify Version Using the CLI**

To verify the active and inactive versions of SocialMiner using the CLI, follow this procedure:

**Procedure**

- 
- Step 1** Log in to application platform CLI using the administrator username and password.

- Step 2** Enter the command **show version active** to check the active version.
- Step 3** Enter the command **show version inactive** to check the inactive version.
- 

## Upgrade VMware Tools

### Procedure

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- Step 1** Power on the virtual machine.
- Step 2** Right click on the virtual machine and then choose **Guest > Install / Upgrade VMware tools**. The **Install/Upgrade Tools** window appears.
- Step 3** Choose **Automatic Tools Upgrade** or **Interactive Tools Upgrade** and click **OK**.
- If you choose **Automatic Tools Upgrade**, the process is complete.
- If you choose **Interactive Tools Upgrade**, then complete the following steps:
- Log in to platform application CLI using the administrator username and password.
  - Enter the command **utils vmtools refresh** .  
The server reboots twice.
- The **Summary** tab of the virtual machine will display that the VMware tools that are running.
- 

### What to do next

- Check the **Summary** tab of the virtual machine and verify that the version of the VMware tools is current.
- If the version is not current, reboot the VM and check.

## Change NIC Adapter Type

### Procedure

---

- Step 1** Power off the virtual machine.
- Step 2** Right click on the virtual machine and then choose **Edit Settings**. The **Virtual Machine Properties** window appears.
- Step 3** In the **Hardware** tab, select **Network adapter 1**, and then click **Add**. The **Add Hardware** window appears.
- Step 4** Select **Ethernet Adapter** and then click **Next**. The **Network Type** window appears.
- Step 5** Select the adapter type **VMXNET3**, click **Next**, and click **Finish**.
- Step 6** To remove the previous network adapter complete the following steps:

- a) Right click on the virtual machine and then choose **Edit Settings**.  
The **Virtual Machine Properties** window appears.
- b) In the **Hardware** tab, select **Network adapter 1**, and click **Remove**.
- c) Click **OK**.

**Step 7** Power on the virtual machine.

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**Note** If you choose to perform a switch-back to previous versions after upgrade, you do not need to modify the virtual machine parameters.

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