Upgrading from version 22 or later to version 26.2

When the upgrade process starts, the Management Node is upgraded first. Then up to 10 Conferencing Nodes are selected and are automatically placed into maintenance mode. When all calls have finished on a node that is in maintenance mode, that node is upgraded and then put back into active service. Another Conferencing Node is then selected, placed into maintenance mode and upgraded, and so on until all Conferencing Nodes have been upgraded.

If all of the calls on a Conferencing Node that is in maintenance mode have not cleared after 1 hour, the node is taken out of maintenance mode and put at the back of the queue of nodes to be upgraded. A further attempt to upgrade that node will be made after all other nodes have been upgraded (or had upgrade attempts made). Up to 10 Conferencing Nodes may simultaneously be in maintenance mode or in the process of being upgraded at any one time.

Alternatively, to avoid unpredictable system behavior due to Conferencing Nodes running conflicting software versions, you may want to manually put **all** of your Conferencing Nodes into maintenance mode before initiating the upgrade process. This will allow all existing calls to finish, but will not admit **any** new calls. You should then actively monitor your Conferencing Nodes' status and manually take each node out of maintenance mode after it has been upgraded to the new software version, so that the system can start taking new calls again on those upgraded nodes.

To upgrade Pexip Infinity software from v22 or later to v26.2:

1. Before upgrading an on-premises deployment, we recommend that you use your hypervisor's snapshot functionality to take a full VMware/Hyper-V snapshot of the Management Node. You may also want to take a snapshot of each Conferencing Node, although depending on the size and complexity of your deployment it may be easier to simply redeploy these from the Management Node (after it has been rolled back) in the unlikely event that this is required.

   Before upgrading a cloud-based deployment (Azure, AWS, GCP or Oracle), you should backup the Management Node via Pexip Infinity's inbuilt mechanism (**Utilities > Backup/Restore**).

2. Download the Pexip Infinity upgrade package for v26.2 from the Pexip download page.

3. Before upgrading, ensure that all "always-on" Conferencing Nodes are powered on and are reachable (i.e. no Connectivity Loss errors), and are all running the same version from which you are upgrading. You do not need to power on any cloud bursting nodes.

4. From the Pexip Infinity Administrator interface, go to **Utilities > Upgrade**.

5. Select **Choose File** and browse to the location of the upgrade package.
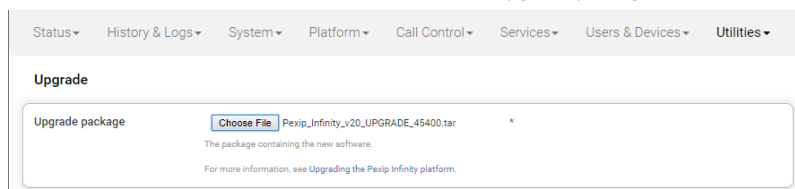
6. Select **Continue**. There will be a short delay while the upgrade package is uploaded.

   After the upgrade package has been uploaded, you are presented with a confirmation page showing details of the existing software version and the upgrade version.

7. To proceed, select **Start upgrade**.

   You are taken to the **Upgrade Status** page, showing the current upgrade status of the Management Node and all Conferencing Nodes. This page automatically refreshes every 5 seconds.

8. When the upgrade completes, all nodes will show a status of **No upgrade in progress** and have the new **Installed version**.

- ○ If a Conferencing Node fails to upgrade, for example if it remains on a **Waiting for calls to clear** status, it should be rebooted. The upgrade process will then continue as expected.
- ○ If the upgrade process completes and there are some nodes that have failed to upgrade, you can restart the upgrade process by uploading the upgrade package to the Management Node again via **Utilities > Upgrade**. This will skip over any nodes that have already been upgraded.
- ○ If you are upgrading from v25.0 or v25.1, due to a known issue it is possible that the upgrade will complete on the Management Node but not automatically proceed to the Conferencing Nodes. To resolve this issue, simply upload the upgrade package again via **Utilities > Upgrade**.

9. If you have Pexip CVI for Microsoft Teams you must also upgrade your associated Teams Connector deployment in Azure to the same version as your Pexip Infinity deployment (including minor/"dot" releases).

   🛈 When upgrading your Teams Connector to version 26:

   - ○ You must be using Az module version 4.7.0 or later.
     - ■ To check your installed version you can run:
       ```
       Get-InstalledModule -Name Az -AllVersions
       ```
     - ■ To install the latest Az version you can run:
       ```
       Install-Module -Name Az -MinimumVersion 4.7.0 -AllowClobber -Scope AllUsers
       ```
   - ○ When upgrading from a previous major release (e.g. from v24.n to v26.2), you must use the latest version of the redeploy script as contained within the v26 documentation. You can use your existing redeploy script if you are upgrading to a new minor/ "dot" release for the same major version (e.g. from 26.0 to 26.2).
   - ○ There are some important changes to the scripts in version 26:
     - ■ The variables initialization script contains a new **$tags** variable. This provides the ability to optionally specify a set of tags (name-value pairs) to apply to the Azure resources that are created for the Teams Connector.
     - ■ The installation and redeploy/upgrade scripts have both been updated to use the new **$tags** variable.
     - ■ The redeploy/upgrade script now removes the dynamic Azure resource groups for you (those named **<prefix>-TeamsConn-<region>-RG** that contain the existing Teams Connector instances). This means you no longer have to perform this step manually via the Azure portal when upgrading or redeploying.
     - ■ In 26.1 the requirement to set up a DNS CNAME record for your Teams Connector hostname has been removed, and you are requested to create a DNS A-record instead. The end of the installation script contains the new steps to create the A-record, and the redeploy script no longer contains the request to check/change your CNAME record. Existing deployments that use a CNAME will still work, but that can be replaced with an A record (by pointing the hostname of your Teams Connector ($PxTeamsConnFqdn) to the Public IP address of the load balancer), if you want to align your DNS process with our latest guidelines.
   - ○ If you have deployed multiple Teams Connectors, you must follow the same redeploy process (with the appropriate variable initialization script) for each Teams Connector.
   - ○ As with all upgrades, you can continue to use the Pexip CVI app from your existing deployment.

   Full instructions are available at https://docs.pexip.com/admin/teams_managing.htm#upgrading.

If you are using VMware snapshots for backup purposes, we recommend that you delete those snapshots after approximately two weeks, providing your upgraded system is operating as expected. This is because Virtual Machines, in general, should not run with snapshots over time.

For full details on upgrading Pexip Infinity, see Upgrading the Pexip Infinity platform.

Upgrading from versions 16-21 to version 26.2

If you are running a Pexip Infinity software version between v16 and v21 inclusive, you must first upgrade to version 22 and then upgrade again to version 26.2. To do this:

1. Before upgrading, ensure that all "always-on" Conferencing Nodes are powered on and are reachable (i.e. no Connectivity Loss errors), and are all running the same version from which you are upgrading. You do not need to power on any cloud bursting nodes (unless you are upgrading from version 21.0, in which case they must also be powered on at least 15 minutes prior to upgrading from v21.0).
2. Download the Pexip Infinity **v22** upgrade file.
3. Follow the steps outlined in Upgrading from version 22 or later to version 26.2, but when asked to **Choose File** browse to the location of the **v22** upgrade file.

4. Verify that the upgrade has completed successfully.

5. Download the Pexip Infinity **v26.2** upgrade file.

6. Follow the steps outlined in Upgrading from version 22 or later to version 26.2, and when asked to **Choose File** browse to the location of the **v26.2** upgrade file.

Upgrading from versions 13-15 to version 26.2

If you are running a Pexip Infinity software version between v13 and v15 inclusive, you must first upgrade to version 17, then upgrade again to version 22, and then finally upgrade to version 26.2. To do this:

1. Download the Pexip Infinity **v17** upgrade file.

2. Follow the steps outlined in Upgrading from version 22 or later to version 26.2, but when asked to **Choose File** browse to the location of the **v17** upgrade file.

3. Verify that the upgrade has completed successfully and then follow the steps outlined above in Upgrading from versions 16-21 to version 26.2.