QMS Computer Recording Installation

Version 5.4, January 2015

This guide contains technical information to help IT professionals install QMS computer recording.

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About This Document

This chapter contains the following information.

- **Audience**,
- **New in this release**,
- **Contents**,
- **Reference materials** ,
- **Document conventions**,
- **Document feedback**,
- **Contact information**,

Audience

This information in this document assists the IT professional responsible for software application deployment. The IT professional must possess a working knowledge and skills to install software on Microsoft client and server operating systems.

New in this release

Core Enhancements:

- Added the ability to automatically reset the state for recording that appear to be in a stuck state

- Added priority levels to recording profiles which will determine the order in which profiles are processed when making a recording determination

- CC:E (Enghouse Interactive Contact Center: Enterprise) Integration enhanced to segment persistent calls.

- All released binaries are now digitally signed.

Installation and Configuration Improvements:

- Brand new installation experience

- Addition of a new pre-requisite checker in order to tell the installer which required Windows components may be missing.

- SQL Installation is enhanced to manage existing SQL installations and authentication modes.

- Included a new configuration tool for Microsoft Lync installations.

Integrations:

- Added a new migration tool to migrate audio files and database entries from the Zeacom Record & Evaluation product.

- Added batch voice analytics processing of recordings. Recordings can be automatically batch processed by the IT Sonix Elsbeth Vocal Coach product

This document includes the following new information:

Contents

The QMS Computer Recording Installation Guide contains the following chapters and information.

Reference materials

The content contained in this document works in combination with the information and procedures in the following documents or Help.

- Enghouse Interactive Quality Management Suite 5.4 Help

- QMS Packet Forwarding Service Installation Guide

- Quality Management Suite Installation Guide

- QMS Call Recording Microsoft – Lync Installation Guide

Document conventions

This document uses the following text formats and notation conventions.

Text format

Bold text indicates a button, field, link, option name, or similar function requiring an action.

Italicized text indicates new terms, directory paths, or references to external documents.

`Text in this font` indicates code.

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1: Provisioning Users for Computer Recording

You can configure the Computer Recording feature for each user from the Quality Management Suite Client.

This chapter includes the following content.

- **Starting the Quality Management Suite Client**, on
- **Verifying available Computer Recording licenses**, on
- **Provisioning Computer Recording on a user**, on

Starting the Quality Management Suite Client

To start the Quality Management Suite Client, complete the following steps.

1. Open your Internet browser and navigate to the Quality Management Suite application at **http://localhost/qms**. Substitute the appropriate server name or IP address for the qms portion of the URL – use "localhost" if running the browser on the primary Quality Management Suite application server.
2. Enter **admin** in the **Username** field.
3. Enter **admin** in the **Password** field.
4. Click **Login**.

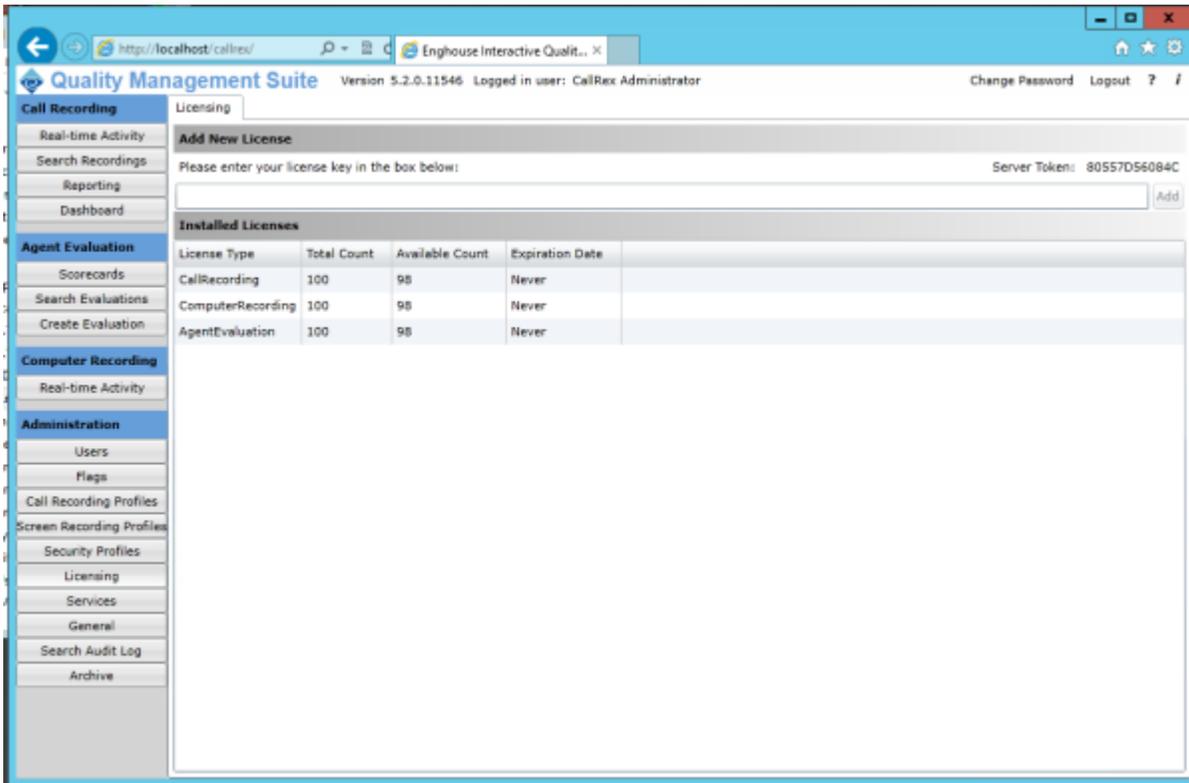The Quality Management Suite Client should open with administrative credentials and display the dasboard view.

Verifying available Computer Recording licenses

This guide assumes the Quality Management Suite installation has already been provisioned with a license key that includes one or more computer recording licenses and at least one of those licenses is available for assignment to a user.

To verify the availability of computer recording licenses, complete the following steps.

1. Select **Administration\Licensing** from the navigation toolbar. The Licensing tab displays.
2. Verify that Computer Recording is included in the list of **Installed Licenses** and that value in the **Available Count** column is greater than zero.

For example, in the following screenshot, the installed Licenses list indicates 60 Computer Recording licenses exist and that 57 are available.

If your installation has no Computer Recording licenses, then a new license key that includes Computer Recording licenses must be obtained. For instructions on updating your license key, please refer to the Quality Management Suite Installation Guide. If you have Computer Recording licenses but none are available, then you can select a user already assigned a computer recording license and review the user's settings as we proceed through the next section.

Provisioning Computer Recording on a user

To provision Computer Recording on a user, complete the following steps.

1. From the navigation toolbar, select **Administration\Users** to display the **Users** tab. From the list of users, select the user on which you will provision Computer Recording and then click **Edit**.

Note:

If you need to add users, please refer to the Quality Management Suite Installation Guide for instructions on provisioning ne

The edit user tab displays for the selected user.

2. In the **Licenses** section, select the **Computer Recording** checkbox. This enables and displays a Computer Recordings Settings section (on the user's edit tab where Windows Login must be specified for the user.
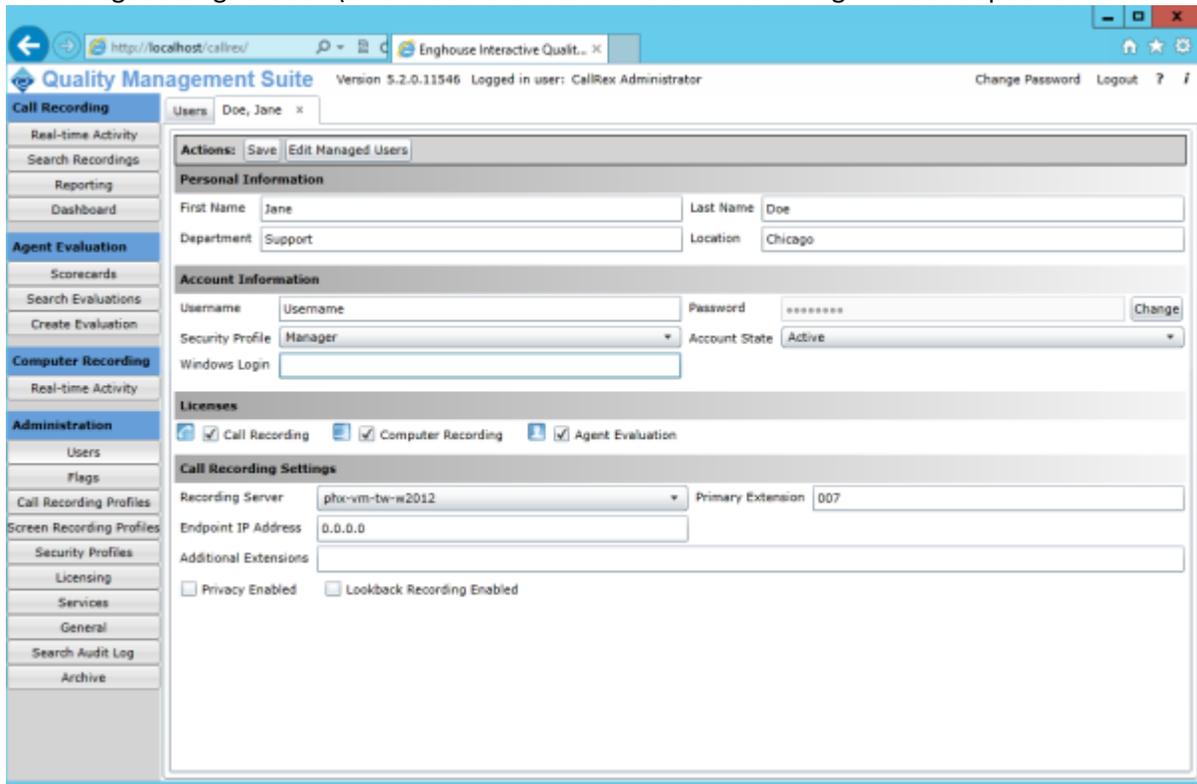
3. Enter the **Windows Login** for the user.
    If recording performs on computers in a MS-Windows domain, then the user's domain username should be entered as the Windows Login using the format **Domain_Name\User_Name**.

4. Click the **Save** button to save the user's new settings.

Note:

The user was automatically made a member of the current default Computer Recording profile. If a different Computer Reco please refer to the Quality Management Suite Installation Guide for instructions to change it.

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5. The provisioning of Computer Recording for the user is now complete.
    Computer Recording also requires that the (Computer Recording) Desktop Agent service is installed on the PC or PCs on which the user works. The next section explains how to deploy the Desktop Agent.

2: QMS Desktop Agent Deployment

To record a user's computer activity, the QMS Desktop Agent service must be installed on the computer on which the user is working. This service is responsible for monitoring user logins (and logouts) and recording the activity on the user's computer screen. The Desktop Agent may be installed locally on the agent's computer using the Desktop Agent Installer. Alternatively, it is possible to deploy the Desktop Agent to remote agent PCs using the Desktop Agent Deployment tool. This section covers installation and usage of the Desktop Agent Deployment tool as well as direct installation of the Desktop Agent service to the targeted PCs.

This chapter includes the following contents:

- {XE "Desktop Agent Deployment:requirements"} Desktop Agent Deployment – Target Host requirements, on

- Installing the Desktop Agent Deployment Tool, on

Desktop Agent Deployment – Target Host requirements

Desktop Agent requirements include the following.

- .NET 4.5 (Full Installation)

- Windows Firewall Settings – make an exception in the firewall for the following TCP ports: 8006 and 8425. Restart Windows Firewall (Alternatively, turn off and disable Windows Firewall service.

- Add HTTP Namespace Reservation for **http://+8425/AgentService/**. See Appendix A for instructions.

- Add Microsoft Windows Desktop Experience. Refer to Server Running the Call Recording section in the Quality Management Suite Installation Guide.

To support remote installation using the deployment too, host computers to which the Desktop Agent deploys must have the following:

- The Remote Registry service must be running. It is manual by default so it must be changed to automatic and started.

Installing the Desktop Agent Deployment Tool

The Desktop Agent Deployment Tool Installer is typically bundled with the Desktop Agent Installer and the Computer Recording Monitor Installer, and is distributed in a zip file. For example, the 4.1 versions of these installers were distributed in a file called CallRex_4_1_0_9554_Computer_Recording.zip.

There are two methods that you can perform in order to install the Desktop Agent Deployment Tool. You can perform a remote installation or a local installation. If you would like to perform a local installation see **Installing the Local Desktop Agent Service**, on .

Installing the remote Desktop Agent Service

To install the Desktop Agent Deployment Tool, complete the following steps.

1. Unzip your version of the distribution file on the Primary Quality Management Server.

2. Using Windows Explorer, navigate to the unzipped **Installers\Desktop Agent Deployment Tool** and run the **DesktopAgentDeploymentTool.msi** program to startup the setup wizard. The Welcome page displays.

3. Click **Next**. The End-User License Agreement page displays.

4. Read and click the **I accept the terms in the License Agreement** checkbox and then click **Next**. The Configure Call Recording Server page displays.

5. Enter the PC Name or the IP address of the server hosting the Data Service and then click **Next**. The Ready to Install page displays.

6. Click **Install** to complete the installation. The Installation Complete page displays when the installer finishes.

7. Click **Finish** to close the installer. The deployment tool should now be installed. The next section explains how to use the deployment tool.

Operating the Desktop Agent Deployment Tool

The Desktop Agent Deployment Tool may be used to view the currently deployed Desktop Agents and to perform new deployments.

To start the Desktop Agent Deployment Tool browse to the folder selected during installation and double-click the **DesktopAgentDeploymentTool** application (**DesktopAgentDeploymentTool.exe)**. The Desktop Agent Deployment Tool application has two tabbed pages: the Current Deployments tab and the New Deployment tab.

Current Deployments Tab

The Current Deployments tab is the default view when the application starts. This view includes a grid to display a list of deployments and five buttons/controls: Refresh, Restart Agent, Uninstall, Upgrade, and Display. On the Refresh and Display filter controls will be disabled and the list of Desktop Agent deployments will initially be empty.

Refresh – The Refresh button queries the Data Service and updates the displayed list of computers that have the Desktop Agent installed on them (and that have successfully registered a logon at least once).

Restart Agent – The Restart Agent button causes the Desktop Agent service to be restarted on the selected deployment host computers. No specific indication is given if a restart is successful, but the Last Contact Time column is typically updated. Additionally, the Desktop Agent logs on the target PC can be checked for entries confirming a restart.

Upgrade – The Upgrade button updates the Desktop Agent service components on the target host. No confirmation is requested and the Upgrade Status window displays indicating the service is being stopped on the target host.

Uninstall – The Uninstall button attempts to remove the Desktop Agent service from the target host(s). The uninstall process first prompts for confirmation.

To uninstall the Agent Service from a host, complete the following steps.

1. Click **Uninstall** in the QMS Desktop Agent Deployment Tool window. The QMS Agent Uninstallation window displays.

2. Click **Yes** and the uninstall begins. The Uninstallation Status window displays.

3. Soon after, the uninstall process may prompt for the credentials to be used to access the target host. If the credentials are necessary, then the Specify Alternate Credentials window displays.

4. Enter the appropriate credentials and click **OK** to proceed. In the Uninstallation Status window the status updates to Uninstall Started.

Note:

The Further status available status occurs because the service that would communicate with the status is unavailable as a res uninstall is stopped or removed.

Display – The Display selection control filters the list of displayed deployments. The default Display filter selections are All Deployments and Inactive Deployments. Active deployments are those that currently have a user logged into them – inactive deployments do not.

To refresh, restart, uninstall, upgrade, or display an agent, complete the following steps.

1. Click **Refresh**. All the currently deployed desktop agents display. The **Restart Agent**, **Uninstall**, and the **Upgrade** buttons apply to the selected deployment(s) and are disabled until at least one row is selected.
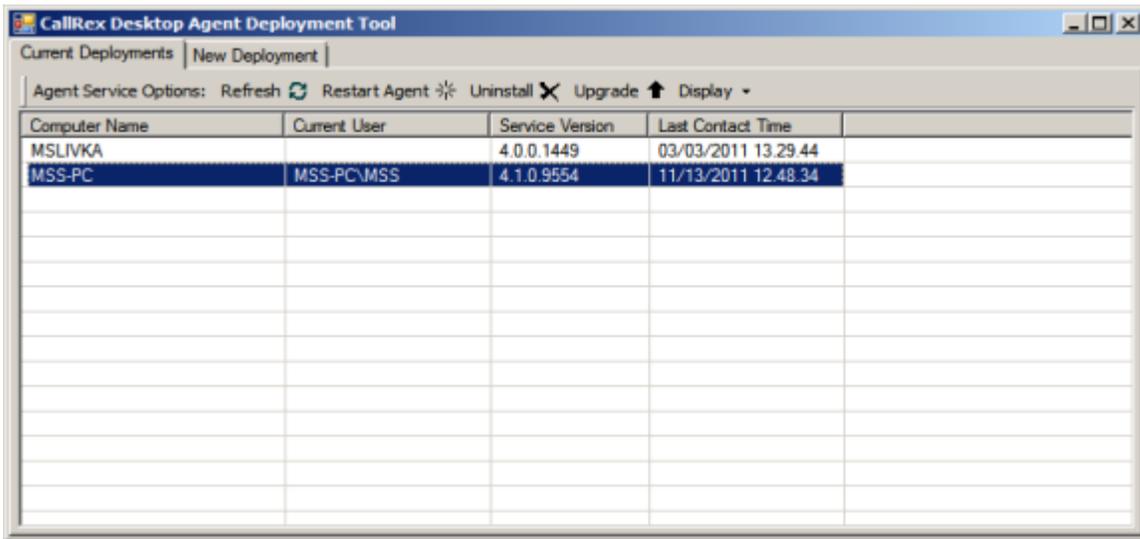
2. Select an item in the list. The **Restart Agent**, **Uninstall**, **Upgrade**, and **Display** buttons are enabled.

3. Select the action that you want to perform and complete the necessary actions that follow.

New Deployment Tab

The New Deployment tab view remotely installs the Desktop Agent to computers (used by Quality Management Suite users); this view includes a grid to display a list of candidate host computers and three buttons: Find Hosts, Install Selected, and Manual Install. The candidate hosts are typically Windows Domain Members as the candidate list is queried from Active Directory. Only the Find Hosts and Manual Install buttons will be initially enabled, while the list of candidate PCs will be empty. The Install Selected button is only enabled when one or more hosts are selected in the (candidate) hosts list.

Find Hosts – Click the Find Hosts button for the Desktop Agent Deployment Tool to issue an Active Directory query to identify any configured domain members. Depending on your network topology, it can take several minutes for this query to complete and the candidate list to display.

Install Selected – The Install Selected button installs the Desktop Agent to computers that are selected in the hosts list – typically computers that are domain members.

Manual Install – The Manual Install button installs the Desktop Agent to computers that are not present in the hosts list – typically non-domain computers.

Installing the Local Desktop Agent Service

The Desktop Agent Installer is typically bundled with the Desktop Agent Deployment Tool Installer and Computer Recording Monitor Installer, and then distributed as a zip file. For example, the 4.1 versions of these installers were distributed in a file called C**allRex_4_1_0_9554_Computer_Recording.zip**. Unzip your version of the distribution file on the target host (or copy the installer files from a network share of removable media).

To install the local Desktop Agent Service, complete the following steps.

1. Use Windows Explorer to navigate to the Installer files (i.e. **Installers\QMS DesktopAgent**).

2. Run the **DesktopAgentSetup** program to start the setup wizard.

3. Click **Install**. The Welcome page displays.

4. Click **Next**. The License Agreement page displays.

5. Select the I accept the terms in the License Agreement checkbox and click Next. The Welcome page displays.

6. Click **Next**. The Call Recording Server page displays.

7. Enter the address of the Computer Recording Server to which this host will connect and then click **Next**. The Ready to Install page displays.

8. Click **Install** to begin the installation. The Installation Complete page displays when the installer finishes.

9. Click **Close** to close the installer. The Desktop Agent service should now be installed and the service should now be running.

10. Open **Services** and locate the QMS Desktop Agent to confirm that it downloaded.

Troubleshooting Desktop Agent Deployment problems

Error: "HTTP could not register URL" in AgentCacheLog.txt

You may see the following error in AgentCacheLog.txt on the client computers when it fails to establish a connection to port 8425 on the server: "HTTP could not register URL **http://+8425/AgentService/**. Your process does not have access rights to this namespace."

Follow the steps in Appendix A to add a namespace registration. If the above steps do not solve this issue, repeat the steps on the Client PC and reboot. You will also need to ensure that there are no software or hardware firewalls blocking the traffic. If there are any firewalls, you need to open up traffic for ports 8006 and 8425.

Current Deployments Tab – Restart, Uninstall, and Upgrade failures

All three of these deployment targeted actions – Restart, Uninstall, and Upgrade – require communications with the selected deployment hosts if a problem occurs, the "Unable to connect…" error dialog typically displays offering the option of using different credentials to perform the action.
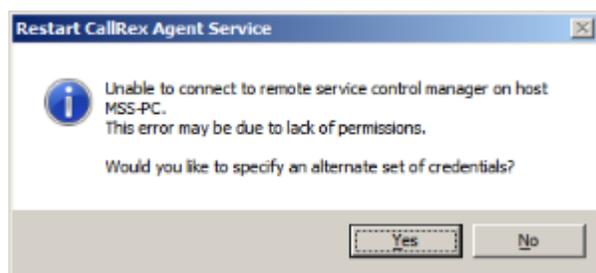
In the event of this error, first ensure that the target host is powered on. If the host is on, then verify that the appropriate credentials are in use. Frequently, success may be attained using the local administrator account of the target host.

If the Desktop Agent Deployment Tool continues to show the host on the previous version after upgrading the Agent Service on a target host, then you need to remove the older agent software with regedit (rename) and also in Program Files (rename), and install the newer agent once more.

New Deployment Tab – Remote Deployment errors

Regardless of the deployment mode (selected or manual), deployments can fail for similar reasons when trying to access the remote host. These failures are typically the result of a requirement missing on the Desktop Agent target host. (see Requirements).

- A failure status that includes "No access: The network path was not found" may indicate that a network or firewall issue may exist. One quick way to test connectivity between the deployment target and the host running the deployment tool is to verify that the ping utility works in both directions. If ping fails in one or both directions, then a closer look at the network configuration or firewall settings is in order. Disabling the firewall may be a quick way to determine if the firewall settings are the issue. If ping works in both directions, you may want to try credentials from the target host's local Administrator account.

- A failure status that includes "No registry access: The network path was not found" may indicate that the remote registry service is not running, start it and retry the deployment. If it was running, verify it is set to automatically start and restart the computer, and retry the deployment. If it still fails, then you may want to try credentials from the target host's local Administrator account.

- A failure status that implies ".NET 4" is missing is straightforward; install the .NET 4 client on the target machine and retry the deployment.

If after completing a deployment the target host does not show up on the Current Deployments tab, then it may be necessary to have the user log out and then back into their computer.

3: Monitoring Support for Computer Recording

Monitoring support is required to live monitor an agent's desktop PC in real-time. The Computer Recording Monitor application, which is launched through the Quality Management Suite Client, provides you with a view of the agent's PC.

This chapter includes the following contents:

- The requirements for monitoring a host, on
- The installation steps for the Computer Recording Monitor, on
- Operating the Computer Recording Monitor, on
- Troubleshooting the Computer Recording Monitor, on

Requirements (for Monitoring Host)

In order to set up a monitoring host, the following requirements must be met.

- On the PC that will do the monitoring: install the Computer Recording Monitor (**…\Installers\QMS Monitor\QMSMonitor.msi**).
- On the QMS Host PC: One must manually create a new .crs MIME type. To create the new crs MIME type on the QMS Host PC, perform the following steps:

1. Start IIS Manager
2. Navigate down to the Default Web Site.
3. With the Default Web Site selected, find the "MIME Type" icon and select Open feature.
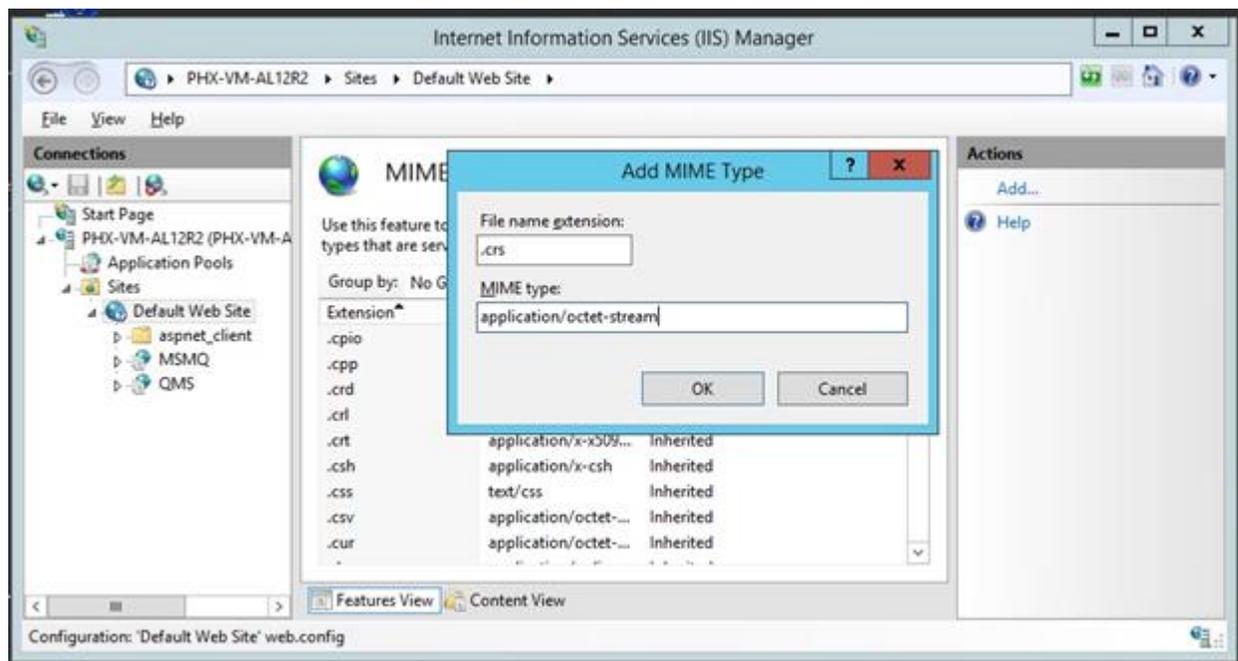4. Click Add

   File name extension: .crs

   MIME type: application/octet-stream

   <OK>
5. Restart the World Wide Web Publishing Service on the QMS host PC.

The screen shot below shows the screen that appears when you open the Default Website.

Installing the Computer Recording Monitor

The Computer Recording Monitor Installer is typically bundled with the Computer Recording Desktop Agent Deployment Tool Installer and the Computer Recording Desktop Agent Installer, and is distributed as a zip file. For example, the 5.4 versions of these installers were distributed in a file called:

QMS_5_4_0_12640_QM_Suite_with_prerequisites.zip

Unzip your version of the distribution file on the PC that will perform the Monitoring. To install the Computer Recording Monitor Installer, complete the following steps.

1. Navigate to the Installer files (i.e. Installers\Monitor) using Windows Explorer.
2. Right click on the **QMSMonitor.msi** program, select install to start the setup wizard. The Welcome page of the Computer Monitor setup wizard displays.
3. Click **Next**. The License Agreement page displays.
4. Select the **I Accept box** and then click **Next**. The Ready to Install page displays.
5. Click **Install** to complete the installation. The Installation Complete page displays when the installer is successfully installed.
6. Click **Close** to close the installer.

The following sections explain how to perform monitoring.

Operating the Computer Recording Monitor

To set up the Computer Recording Operation, complete the following steps.

1. After logging into the Quality Management Client, select **Real-time Activity** from the Computer Recording section in the Navigation bar. The Real-time view displays.

2. Select a user logged into a computer. The Monitor button becomes enabled.

3. Click **Monitor**. A dialog displays inquiring if you want to open or save the specified file.

4. Click **Open** to view the user's desktop in a new window. A new window displays showing the user's desktop.

Note:

Multiple Computer Recording windows may be opened simultaneously (including duplicates of the same user).

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5. Close the monitoring window to end monitoring.

Troubleshooting the Computer Recording Monitor

If clicking Monitor results in a 404 error, then the .crs MIME type could be missing; see the Monitoring Requirements.

Appendix: Adding a HTTP Namespace Reservation for Agent Service

Quality Management Suite employs a WCF service that must listen (for client connections) on a particular URL address. By default, this service runs as non-administrative user and does not have the necessary permissions to listen. The HTTP Namespace Reservation provides the Quality Management Suite service with the necessary permissions.

To add an HTTP Namespace Reservation for the Target Desktop Agent PC service, complete the following steps.

1. Download the **HttpNamespaceManager.zip** file (located at http://www.telrexsupport.com/downloads/support/HttpNamespaceManager.zip). This file needs to be copied to each agent target local host PC.

2. Log on to the PC as a local administrator.

3. Unzip the file on each PC and double-click **HttpNamespaceManager.exe**.

4. Click **Run**. The HTTP Namespaces window displays.

5. Click **Add**.

6. Enter **http://+:8425/AgentService/** into the Enter the URL to add field.

> **Note:**
>
> The **namespace** is case sensitive.

7. Click **OK**. The Permissions window displays.

8. Click **Add**. The Add User or Group window displays.

9. Type in Everyone in the **Enter the User or Group Name** field and click **OK**. The User or Group Found window displays.

10. Click **Yes** to verify adding everyone.

11. Click **OK**. The Permissions window closes.

12. Highlight the namespace just added and click **Edit**.

13. Click the **GenericAll** checkbox under AccessAllowed and click **OK**.

14. Restart the World Wide Web Publishing Service (or reboot PC) to see changes.

    a. Open Services. The Services Window displays.

    b. Locate **World Wide Web Publishing Service** and right-click on the service.

    c. Click **Restart**. The service restarts.

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