

Quality Management Suite Pre-Installation Checklist

Version 5.3

Perform the following procedures and environment reviews prior to the installation.

- Verify that the Quality Management Suite Server is dedicated for use by the Quality Management Suite software
- Verify that the server meets the Quality Management Suite Specifications available on <http://www.telrex.com/assets/quality-management-server-specifications.pdf>
- Verify that all Windows Updates have been performed
- Verify that the Windows Firewall on the Quality Management server has been turned OFF
- Verify that the TCP/IP on the the Packet Capture Adapter has been turned OFF
- Create the storage folder to hold recordings **only** if you are not using a network storage location or using the default storage location. Make sure that the selected disk volume has adequate storage space for your recordings. To calculate storage requirements refer to [Quality Management Server & Call Recording Service specifications](#).
- Verify that you have the appropriate permissions to install software, such as local administrative privileges.
- Confirm that call recording and/or CTI licenses have been purchased, if required by your PBX vendor.
- Confirm that all phones have at least one unique extension, appearing as the first extension on the phone.
- If a CTI provider, such as TAPI, is required for your specific integration, confirm that it is installed, configured, and working. Please refer to the QMS integration guide for your specific PBX platform, if available.
- Confirm that the User Account Controls are turned OFF. Refer to <http://windows.microsoft.com/en-us/windows-vista/turn-user-account-control-on-or-off>
- Retrieve the Enghouse Interactive Data Service Address (hostname or IP address), the Packet Capture Adapter name, and the Network (Messaging) Adapter name. This information is necessary for installing the Call Recording Service.

Prior to beginning the installation review this checklist once again.

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- Office of the General Counsel
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