

### SpeechMiner 8-5 Administration Guide

copyright O Genesys Telecommunications Laboratories. All rights reserved. [www.Genesys.com]

The information contained in this document is subject to change without notice. This document contains proprietary information which is protected by copyright. All rights are reserved. No part of this document may be photocopied, reproduced, or translated to another language without the prior written consent of Genesys Telecommunications Laboratories.

# Table of Contents

Chapter 1: Welcome	1
Chapter 2: Introduction	2
Chapter 3: Installing SpeechMiner	3
System Requirements	4
What Is Installed	5
Ports Used by System Components	6
Before You Begin	7
Setting Up the Required Software	8
Installing the .NET Framework	8
Setting Up the SQL Server	8
Installing SQL Server 2008 R2	9
Installing SQL Server 2012	14
Configuring the SQL Server	18
Configuring the SQL Server Settings	19
Configuring the Reporting Services	20
Setting the Maximum Memory Usage	29
Installing IIS on the Web Server or Interaction Receiver Server	31
On Windows Server 2008	32
On Windows Server 2012	41
Installing Report Viewer	45
Disabling Simple File Sharing	46
Pre-installation Checklist	47
Installing the Components	47
Installing the SpeechMiner Database	51
Running the Setup Wizard	51
Alternative Method for Installing the Database Server	53
Creating the Storage Partitions	54
Configuring the Database Maintenance Job	55
Deploying the SQL CLR	57
Configuing the Recovery Model	58
Configuring the Autogrowth	60
Installing the SpeechMiner Web	
Installing the Interaction Receiver	
Installing the UPlatform Server	
Running the Setup Wizard	
Creating the Required Folders	
	60

Installing SMART	
Configuring Permissions	
For UPlatform (SMUSER)	
For UConnector	
For SMART	
For the Web Server	
Configuring Internet Explorer	
Chapter 4: Configuring SpeechMiner	
Required Permissions	
Encrypting the Connection to the Database	
Opening SMConfig	
Saving Changes	
Sites & Machines	
Configuring Sites	
Configuring Machines and Tasks	
Remote Index Search	
Reports	
Licenses	
Services	
Initial Configuration	
Required Permissions	
Starting and Stopping the System	
Audio	
Index	
Backing Up the Index	
Restoring the Index	
Optimizing the Index	
Setting the Date and Time	
Configuring a VMWare Server	
Additional Configuration for Recording Modes	
Chapter 5: Snippets	
Chapter 6: PDF Index	



Welcome to the SpeechMiner Administration Guide.









If you're unable to find what you're looking for in this help system, try our support page:

> http://www.genesys.com/support/generalpages/contact-us.aspx

or contact our support team at:

customercare@genesys.com

© 2014 Genesys Telecommunications Laboratories

Home > Introduction

# Introduction

SpeechMiner®, Genesys Telecommunications Laboratories's award-winning speech-analytics platform analyzes call content as well as text-based interactions such as e-mails and chats. Speech-analytics leverages recorded customer interactions (from any recording system) and analyzes each interaction for critical business topics and events. With unmatched accuracy, the system "listens" to conversations between customers and contact-center agents, precisely identifies the topics that were discussed, and categorizes what took place within each interaction.

Beginning with version 8.5, SpeechMiner supports three alternative modes of operation:

- Analytics and Recording UI: In this mode, SpeechMiner plays back, and analyzes the Genesys Interaction Recording recorded calls/interactions, and records of other interactions, and process the contents of these calls/interactions.
- Recording UI Only: In this mode, SpeechMiner plays back the call audio and displays the other interactions, but the contents
  of the interactions are not processed by the speech-analytics system.
- Analytics Only: In this mode, SpeechMiner imports recorded call audio and records of other interactions from any recording system, and uses its speech-analytics system to process the contents of the interactions.

The SpeechMiner user interface is made up of two software components:

- SpeechMiner browser-based interface, which offers a variety of ways to access recorded interactions and the results of the analyses performed by the speech-analytics system on them (when Analytics mode is used). Users of the speech-analytics system can employ this interface to find interactions that have specific characteristics or that deal with particular topics, to identify and listen to the parts of calls that interest them, to audit and fine-tune SpeechMiner's call processing, and to keep track of a range of system-metrics.
- 2. SpeechMiner Administration Tool (SMART), which enables users of the speech-analytics system to configure it to search interactions for specific topics and other characteristics.

This manual explains how to install and configure SpeechMiner. It is intended for system administrators. Most of the steps described are only performed once, usually with the help of Genesys Customer Care.

#### See also

Welcome Installing SpeechMiner Configuring SpeechMiner Home > Installing SpeechMiner

### Installing SpeechMiner

This chapter explains how to install SpeechMiner at your enterprise. This procedure includes setting up the system components, the database, and the software that users employ to interact with the system. The components can be installed on a single machine, or on separate machines, as required by the particular configuration of your system.

#### **System Services**

The SpeechMiner system makes use of the following components:

Component	Modes	Description	For Installation On
UPlatform service	All modes	Manages all the processing tasks of SpeechMiner – fetching (in the case of Analytics mode), recognition and exploration (in the case of Analytics and Analytics & Recording UI modes), categorization compression, and indexing (in all modes).	All machines on which SpeechMiner processing tasks take place
Recognition engine	Analytics and Recording UI, Analytics	Nuance speech-recognition engine that transcribes call audio into text.	<ul> <li>All machines on which SpeechMiner processing tasks take place (i.e., on which UPlatform is installed)</li> <li>All machines on</li> </ul>
UConnector service	Analytics and Recording UI, Analytics	Retrieves interaction data (call audio and the text of other types of interactions) and metadata from the recording systems and places it in the SpeechMiner <u>input folder</u> .	which SMART runs A machine that can connect both to the recording system database and to the SpeechMiner <u>input</u> folder
Interaction Receiver	Analytics and Recording UI, Recording UI	A web service which fetches calls (audio and metadata) from the Genesys Interaction Recording system.	A machine that can connect both to the recording system and the database
MS-SQL database	All modes	The SpeechMiner database, which stores the interaction data and the results of interaction processing.	SpeechMiner database server
Web service	All modes	Runs the SpeechMiner web-based interface that anables users to view and work with the interaction data after it has been processed	One or more machines in the system, as required

#### System Software

Users employ the following software to work with SpeechMiner:

- 1. **SpeechMiner browser-based interface**, which offers a variety of ways to access the audio of calls and the results of the interaction analyses performed by the system (when Analytics mode is in use). Users can employ this interface to find interactions that have specific characteristics or that deal with particular topics, to identify and listen to parts of calls that deal with particular issues or have specific characteristics, to audit and fine-tune SpeechMiner's call processing, to keep track of a range of system-metrics, and to generate reports based on the data.
- 2. **SpeechMiner administration tool (SMART)**, an application that enables users to configure the speech-analytics system to search calls for specific topics and other characteristics.
- 3. SMConfig, an application that is used by system administrators to configure SpeechMiner.

#### See also

System Requirements What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Welcome Introduction Configuring SpeechMiner

Home > Installing SpeechMiner > System Requirements

# System Requirements

#### Database

The database must run on a machine on which one of the following SQL servers is installed:

- Microsoft SQL Server 2008 with Reporting Services, SP1 or above (Enterprise edition is recommended for large installations.)
   -OR-
- Microsoft SQL Server 2012 with Reporting Services

#### **Operating Systems**

All machines must have Windows operating systems. The table below lists the Windows operating systems that are compatible with each SpeechMiner component.

Component	Compatible Operating Systems
Servers (platform, database, and Web)	<ul><li>Windows Server 2008 R2 64 bit</li><li>Windows Server 2012</li></ul>
SMART	<ul> <li>Windows Server 2008 R2 64 bit</li> <li>Windows Server 2012</li> <li>Windows 7 Professional</li> <li>Windows 8 Professional</li> </ul>
Web interface	<ul> <li>Windows XP Professional (SP3 or above)</li> <li>Windows Vista Business 32 bit</li> <li>Windows 7 Professional 32 bit</li> <li>Windows Server 2008</li> <li>Windows Server 2008 R2</li> </ul>

#### Browser

The SpeechMiner web interface is compatible with Internet Explorer (IE) versions 8, 9, and 10, and Chrome.

Neither JAVA, .NET, or ActiveX are required for web-based access to SpeechMiner (via the SpeechMiner web-based interface).

Users of the SpeechMiner web application must have a functioning audio device on their desktop. Users browsing using Internet

Explorer should have Windows Media Player version 10 or 11 installed.

#### Memory (RAM)

Machines running SpeechMiner servers and applications should have at least the following amounts of memory:

- Database server: 4 GB 32 GB
- Web server: 4 GB
- SMART application: 1 GB minimum; 2 GB recommended
- Platform server: 4 GB 8 GB (allow 1 GB per recognizer task, as a rule of thumb)

#### **Disk Space**

The machines in the system should have at least the following amounts of disk space available before you install SpeechMiner on them:

- All servers: Approximately 1 GB of disk space for the recognition engine
- Recognition server(s): For the UPlatform service, 20MB of disk space for the runtime folder plus approximately 10 GB for caching recognition packages. (The exact amount required for caching depends on the size of the implementation.)
- Database server: At least 20 GB for the SpeechMiner database, plus 20MB of disk space for the runtime folder of the UConnector service. In addition, on some types of recording-system integrations that have a very high volume, a larger (10GB-200GB) storage area is needed for temporary files.

Notes:

- The initial size of the database is about 20 GB; it may grow larger, depending on the call volume and the <u>call-purging</u> <u>policy</u>.
- On relatively high-volume installations, UConnector may need its own dedicated server.
- Web server: About 20MB for the SpeechMiner virtual folder, plus additional space for cached reports and call audio. (The exact amount required for caching depends on user activity.)
- Interaction Receiver: About 15 MB for the Interaction Receiver virtual folder.
- Machines running SMART: About 1 GB of disk space for the recognition engine

#### See also:

What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > What Is Installed

### What Is Installed

When the installation process is completed, the following software will be installed on the machines in your system:

#### **On All Servers**

• MS .NET Framework 3.5 with SP1 (aka 3.5.1)

#### On the Recognition Server(s)

- UPlatform service
- Nuance recognition engine

#### On the DB Server

- MS-SQL 2008 or 2012 Server, including MS Reporting Services (normally installed by the customer beforehand)
- SpeechMiner database
- UConnector service

#### On the Web Server

SpeechMiner virtual folder

#### On the Interaction Receiver Server

Interaction Receiver virtual folder

#### On Every Machine Running SMART

- .Net Framework 3.5 with SP1
- Recognition engine
- SMART executable and runtime files (dlls)

#### See also

System Requirements Ports Used by System Components Before You Begin Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Ports Used by System Components

### Ports Used by System Components

The following ports are used by SpeechMiner.

Note: The ports listed are the default ports. Most of them can be changed upon request.

Source	Destination	Protocol and Port Pair (ex. TCP 3389)
Web servers, Platform servers, SpeechMiner Administrator Workstations (SMConfig/SMART)	Database server	tcp 1433
Database server, Web server, Platform servers, SpeechMiner Administrator Workstations (SMConfig/SMART)	MS-SQL report server	http 80 / https 443
SpeechMiner Administrator Workstations (SMConfig/SMART)	Web servers	http 80 / https 443
Genesys Interaction Recording server	Interaction Receiver Server	http 80/ https 443
Web Servers	Genesys Interaction	http 80/ https 443

	Receiver Server	
Web Servers	Web servers	http 80 / https 443
SpeechMiner Administrator Workstations (SMConfig)	Platform servers, Web servers	tcp 135
Platform servers (recognition), SpeechMiner Administrator Workstations (SMART)	SpeechMiner Nuance License server	tcp 27000 + another port (can be configured in license file)
Web servers, Platform servers, SpeechMiner Administrator Workstations (SMConfig/SMART)	File System	smb over tcp 445
Web servers, SpeechMiner Administrator Workstations (SMConfig/SMART)	Active Directory	tcp 88
Web servers, Platform servers	Email server	smtp over tcp 25

#### Ports and Protocols Required for SpeechMiner UConnector

SpeechMiner UConnector requires access to the recording-system database and file-storage system. Access to the database is implemented using the TCP protocol with port 1433. (The port number can be configured on the database server.) Access to the file-storage system is implemented using SMB over TCP protocol with port 445. Other protocols can be used as well, if they are available in the underlying file-storage system.

#### See also

System Requirements What Is Installed Before You Begin Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Before You Begin

### Before You Begin

Before you install SpeechMiner, make sure of the following:

- The <u>system requirements</u> are met.
- The <u>required software</u> has been installed on the machines in your system.
- The required permissions are set.

Then, review the Pre-installation Checklist before you begin the installation process.

#### See also

System Requirements What Is Installed Ports Used by System Components Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software

# Setting Up the Required Software

This section explains how to install the required third-party software on the machines in your system. This includes the following items:

- .Net framework
- SQL server
- IIS
- Report Viewer

You should install the required software before you install SpeechMiner. In addition, you should <u>disable simple file sharing</u> on all machines in your system before you install SpeechMiner.

#### See also

Installing the .NET Framework Setting Up the SQL Server Installing IIS on the Web Server or Interaction Receiver Server Installing Report Viewer Disabling Simple File Sharing

Pre-installation Checklist

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Installing the .NET Framework

### Installing the .NET Framework

Microsoft .NET Framework 3.5 SP1 (3.5.1) must be installed on all machines that will run SpeechMiner components or interact with SpeechMiner. You can download the installation package at <a href="http://download.microsoft.com/download/2/0/e/20e90413-712f-438c-988e-fdaa79a8ac3d/dotnetfx35.exe">http://download.microsoft.com/download/2/0/e/20e90413-712f-438c-988e-fdaa79a8ac3d/dotnetfx35.exe</a>.

If you are installing the .NET Framework on machines that are running Windows Server 2008 R2 or Windows Server 2012, do not download this installation package, because it is included with these operating systems. On these operating systems, you can install the framework using the **Add Features** option in the Server Manager (**Start > Administrative Tools > Server Manager**). For information about installing .NET Framework 3.5.1 on Windows Server 2008 R2, see <a href="http://support.microsoft.com/kb/2027770">http://support.microsoft.com/kb/2027770</a>. For information about installing .NET Framework 3.5.1 on Windows Server 2012, see <a href="http://support.microsoft.com/kb/2027770">http://support.microsoft.com/kb/2027770</a>. For information about installing .NET Framework 3.5.1 on Windows Server 2012, see <a href="http://support.microsoft.com/kb/2027770">http://support.microsoft.com/kb/2027770</a>. For information about installing .NET Framework 3.5.1 on Windows Server 2012, see <a href="http://support.microsoft.com/kb/75396">http://support.microsoft.com/kb/75396</a>.

#### See also

Setting Up the SQL Server Installing IIS on the Web Server or Interaction Receiver Server Installing Report Viewer Disabling Simple File Sharing

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Setting Up the SQL Server

### Setting Up the SQL Server

SpeechMiner® Administration Guide Release 8.5 © 2014, Genesys Inc. Unauthorized Reproduction is Prohibited

Before you begin installing SpeechMiner, you must install the SQL server on the database server. You can use either Microsoft SQL Server 2008 with Reporting Services or Microsoft SQL Server 2012 with Reporting Services. For additional information, please refer to the following Genesys documents: SQL2008 Server Installation and Configuration for SpeechMiner and SQL2012 Server Installation and Configuration for SpeechMiner.

#### See also

Installing the .NET Framework Installing IIS on the Web Server or Interaction Receiver Server Installing Report Viewer Disabling Simple File Sharing

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Setting Up the SQL Server > Installing SQL Server 2008 R2

### Installing SQL Server 2008 R2

In order to install SQL Server 2008 R2 for use with SpeechMiner, you basically just run the normal setup wizard and follow the instructions in it. Below are instructions for the wizard screens for which SpeechMiner requires specific selections.

#### To install SQL Server 2008 R2:

- 1. Run the installation program. the SQL Server Installation Center window opens, with the Planning screen open.
- 2. In the menu on the left, select Installation. The Installation screen opens.

🚼 SQL Server Installation Center	×
Planning Installation Maintenance Tools	New installation or add features to an existing installation.           Launch a wizard to install SQL Server 2008 R2 in a non-clustered environment or to add features to an existing SQL Server 2008 R2 instance.           New SQL Server failover cluster installation           Launch a wizard to install a single-node SQL Server 2008 R2 failover cluster.
Resources Advanced Options	Add node to a SQL Server failover duster Launch a wizard to add a node to an existing SQL Server 2008 R2 failover duster.
	Launch a wizard to upgrade SQL Server 2000, SQL Server 2005 or SQL Server 2008 to SQL Server 2008 R2.
SQL Server 2008 R2	

Installation screen

- 3. Select New installation or add features to an existing installation. The installation wizard opens.
- 4. Follow the on-screen instructions. When the screens mentioned below open, follow the instructions below to select the

required settings and options for SpeechMiner.

5. In the Setup Role screen, select SQL Server Feature Installation.

ion option to individually select which feature components to install, or	click a feature role to
on option to individually select which feature components to install, or	click a feature role to
<ul> <li>other features.</li> <li>C SQL Server PowerPivot for SharePoint Install PowerPivot for SharePoint on a new or existing SharePoint 2</li> </ul>	2010 server to support PowerPivot data
	<ul> <li>SQL Server PowerPivot for SharePoint</li> <li>Install PowerPivot for SharePoint on a new or existing SharePoint 2 access in the farm. To use the New Server option, SharePoint must</li> <li>Add PowerPivot for SharePoint to: New Server</li> <li>All Features With Defaults</li> </ul>

#### Setup Role screen

- 6. In the Feature Selection screen, select the following options:
  - Database Engine Services
  - Reporting Services
  - Client Tools Connectivity
  - SQL Server Books Online
  - Management Tools Basic
  - Management Tools Complete

SQL Server 2008 R2 Setup	
Select the Enterprise features to	stall.
Setup Support Rules Product Key License Terms Setup Role Feature Selection Installation Rules Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Ready to Install Installation Progress Complete	Eeatures:       Description:         Instance Features       Server features are instance-aware and have their own registry hives. They support multiple instances on a compute         SQL Server Replication       Full-Text Search         Analysis Services       Reporting Services         Reporting Services       Reporting Services         Shared Features       Business Intelligence Development Studio         Client Tools Connectivity       Integration Services         Client Tools Backwards Compatibility       Client Tools Packwards Compatibility         Client Tools SDK       SQL Server Books Online         Management Tools - Basic       Management Tools - Complete         SQL Client Connectivity SDK       Microsoft Sync Framework         Redistributable Features       Hicrosoft Sync Framework
	Select All       Unselect All         Shared feature directory:       C:\Program Files\Microsoft SQL Server\         Shared feature directory (x86):       C:\Program Files (x86)\Microsoft SQL Server\
	< <u>B</u> ack <u>N</u> ext > Cancel Help

#### Feature Selection screen

- 7. In the Server Configuration screen, in the Service Accounts tab, for the SQL Server Agent, SQL Server Database Engine, and SQL Server Reporting Services, do the following:
  - Enter the user account and password of the service account.
  - Under Startup Type, select Automatic.

🚼 SQL Server 2008 R2 Setup					- 0
Server Configuration					
Specify the service accounts and c	ollation configuration.				
Setup Support Rules Product Key License Terms	Service Accounts Collation	se a separate account for each S	QL Server service	e.	
Setup Role	Service	Account Name	Password	Startup Typ	2
Feature Selection	SQL Server Agent	libbysql		Automatic	-
Installation Rules	SQL Server Database Engine	libbysgl		Automatic	-
Instance Configuration	SQL Server Reporting Services	libbysql		Automatic	-
Disk Space Requirements	SQL Server Browser	NT AUTHORITY/LOCAL S		Disabled	-
Error Reporting Installation Configuration Rules Ready to Install Installation Progress Complete					
		< <u>B</u> ack	<u>N</u> ext >	Cancel	Help

Server Configuration screen, Service Accounts tab

8. In the Server Configuration screen, in the Collation tab, under Database Engine, select SQL\_Latin1\_General\_CP1\_CI\_AS (the default value).

🚼 SQL Server 2008 R2 Setup		
Server Configuration		
Specify the service accounts and	collation configuration.	
Setup Support Rules Installation Type Product Key License Terms Setup Role Feature Selection Installation Rules Instance Configuration Disk Space Requirements <b>Server Configuration</b> Database Engine Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Ready to Install Installation Progress Complete	Service Accounts       Collation         Database Engine:       SQL_Latin1_General_CP1_CI_AS         Latin1-General, case-insensitive, accent-sensitive, kanatype-insensitive, width-insensitive for Unicode Data, SQL Server Sort Order 52 on Code Page 1252 for non-Unicode Data	<u>C</u> ustomize
	< <u>B</u> ack <u>N</u> ext > Cancel	Help

Server Configuration screen, Collation tab

9. In the Database Engine Configuration screen, in the Data Directories tab, select the locations for the database folders. If possible, put the User database directory, the Temp DB directory, and the Backup directory on a separate drive from the other folders.

		_ [] >
	and data directories.	
<u>D</u> ata root directory: <u>S</u> ystem database directory: <u>U</u> ser database directory:	C:\Program Files\Microsoft SQL Server\ C:\Program Files\Microsoft SQL Server\MSSQL10_50.LIBBYINSTANCE\MSSQL\Data	
	Account Provisioning Data Directory: <u>D</u> ata root directory: <u>S</u> ystem database directory: <u>U</u> ser database directory: User databaselog directory: <u>T</u> emp DB directory: T <u>e</u> mp DB log directory:	ation security mode, administrators and data directories.         Account Provisioning       Data Directories         Plata root directory:       C:\Program Files\Microsoft SQL Server\         System database directory:       C:\Program Files\Microsoft SQL         User database directory:       D:MSSQLData         User database_log directory:       C:MSSQLDataLog         Temp DB log directory:       D:MSSQLTempDB         Tgmp DB log directory:       C:MSSQLTempDBlog

Database Engine Configuration screen, Data Directories tab

- 10. In the Reporting Services Configuration screen, select Install the native mode default configuration.
- 11. When you finish installing the SQL Server, restart the machine on which you installed it.

#### See also

Installing SQL Server 2012 Configuring the SQL Server

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Setting Up the SQL Server > Installing SQL Server 2012

### Installing SQL Server 2012

In order to install SQL Server 2012 for use with SpeechMiner, you basically just run the normal setup wizard and follow the instructions in it. Below are instructions for the wizard screens for which SpeechMiner requires specific selections.

#### To install SQL Server 2012:

- 1. Run the installation program. the SQL Server Installation Center window opens, with the Planning screen open.
- 2. In the menu on the left, select **Installation**. The **Installation** screen opens. Select **New installation or add features to an existing installation**. The installation wizard opens.
- 3. Follow the on-screen instructions. When the screens mentioned below open, follow the instructions below to select the required settings and options for SpeechMiner.
- 4. In the Setup Role screen, select SQL Server Feature Installation.
- 5. In the Feature Selection screen, select the following options:

- Database Engine Services
- Reporting Services
- Client Tools Connectivity
- SQL Server Books Online
- Management Tools Basic
- Management Tools Complete

1	SQL Server 2012 Setup	_ <b>_</b> X
Feature Selection Select the Standard features to	install.	
Setup Support Rules Setup Role Feature Selection Installation Rules Instance Configuration Disk Space Requirements Server Configuration Database Engine Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Ready to Install Installation Progress Complete	Eeatures:	Feature description:         The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on the same computer.         V         Pererequisites for selected features:         Already installed:         Microsoft .NET Framework 4.0         Windows PowerShell 2.0         Microsoft Visual Studio 2010 Shell
	Select All Unselect All Shared feature directory: C:\Program Files\Microsoft Shared feature directory (286): C:\Program Files (x86)\Micro	
	< <u>B</u> ack	Next > Cancel Help

#### Feature Selection screen

- 6. In the Server Configuration screen, in the Service Accounts tab, for the SQL Server Agent, SQL Server Database Engine, and SQL Server Reporting Services, do the following:
  - Enter the user account and password of the service account.
  - Under Startup Type, select Automatic.

		SQL Server 2	2012 Setup			1
Server Configuration Specify the service accounts and	collation configuratio	n.				
Setup Support Rules Setup Role Feature Selection Installation Rules Instance Configuration Disk Space Requirements <b>Server Configuration</b> Database Engine Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Ready to Install Installation Progress Complete	-	ase Engine ting Services	se a separate account for each SQL Serv Account Name NT Service\SQL SERVERAGENT NT Service\MSSQL SERVER NT Service\ReportServer NT AUTHORITY\LOCAL SERVICE	Password	Startup Type Automatic Automatic Disabled	

Server Configuration screen, Service Accounts tab

7. In the Server Configuration screen, in the Collation tab, under Database Engine, select SQL\_Latin1\_General\_CP1\_CI\_AS (the default value).

1	SQL Server 2012 Setup	_ 🗆 X
Server Configuration		
Specify the service accounts and	collation configuration.	
Setup Support Rules Setup Role Feature Selection Installation Rules Instance Configuration Disk Space Requirements <b>Server Configuration</b> Database Engine Configuration Reporting Services Configuration Error Reporting Installation Configuration Rules Ready to Install Installation Progress Complete	Service Accounts       Collation         Database Engine:       SQL_Latin1_General_CP1_CLAS         Latin1-General, case-insensitive, accent-sensitive, kanatype-insensitive, width-insensitive for Unicode Data, SQL Server Sort Order 52 on Code Page 1252 for non-Unicode Data         Unicode Data	Customize
	< <u>B</u> ack <u>N</u> ext > Cancel	Help

Server Configuration screen, Collation tab

8. In the **Database Engine Configuration** screen, in the **Data Directories** tab, select the locations for the database folders. If possible, put the User database directory, the Temp DB directory, and the Backup directory on a separate drive from the ither folders.

1		L Server 2012 Setup	$\bigcirc$
Database Engine Config Specify Database Engine auther	guration tication security mode, administra	ators and data directories.	
Setup Support Rules Setup Role Feature Selection Installation Rules Instance Configuration Disk Space Requirements Server Configuration Oatabase Engine Configuration Reporting Services Configuration Fror Reporting Installation Configuration Rules Ready to Install Installation Progress Complete	Server Configuration Data Dir Data root directory: System database directory: User database directory: User database log directory: Temp DB directory: Temp DB log directory: Backup directory:	ectories FILESTREAM C:\Program Files\Microsoft SQL Server\ C:\Program Files\Microsoft SQL Server\MSSQL11.MSSQLSERVER\MSSQL\Data C:\Program Files\Microsoft SQL Server\MSSQL11.MSSQLSERVER\MSSQL\Log C:\Program Files\Microsoft SQL Server\MSSQL11.MSSQLSERVER\MSSQL\Backurp C:\Pro	
		< Back Next > Cancel H	elp

Database Engine Configuration screen, Data Directories tab

- 9. In the Reporting Services Configuration screen, select Install the native mode default configuration.
- 10. When you finish installing the SQL Server, restart the machine on which you installed it.

#### See also

Installing SQL Server 2008 R2 Configuring the SQL Server

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Setting Up the SQL Server > Configuring the SQL Server

### Configuring the SQL Server

Configuring the SQL server includes the following tasks:

- Configuring the <u>SQL server</u> itself
- Configuring the <u>reporting services</u>
- Optimizing the memory usage

Note: The illustrations in this section are from SQL Server 2008 R2, but the instructions are for both SQL Server 2008 R2 and SQL Server 2012.

**Note:** For information about enabling remote access through SQL Management Studio when Windows Firewall is on, see <a href="http://msdn.microsoft.com/en-us/library/ms175043.aspx">http://msdn.microsoft.com/en-us/library/ms175043.aspx</a>. If you do not follow these instructions, you may not be able to connect remotely from your computer to the SQL server from SQL Management Studio.

#### See also

Installing SQL Server 2008 R2 Installing SQL Server 2012 Configuring the SQL Server Settings Configuring the Reporting Services Setting the Maximum Memory Usage

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Setting Up the SQL Server > Configuring the SQL Server > Configuring the SQL Server > Settings

### Configuring the SQL Server Settings

After the SQL server is installed, you should do the following:

- Ensure that the SQL server is running
- Configure the SQL server to start automatically
- Make sure both the TCP/IP and the Named Pipes protocols are enabled

Note: After you install SpeechMiner, you also have to deploy the CLR assembly and set its permissions. See Deploying the SOL CLR.

#### To configure the SQL server and enable the required protocols:

- 1. In the Start menu, go to Microsoft SQL Server 2008 > Configuration Tools > SQL Server Configuration Manager. The SQL Server Configuration Manager opens.
- 2. On the left side of the window, select SQL Server Services.



- 3. On the right side of the window, for SQL Server Agent, check that the Status is Running, and the Start Mode is Automatic.
- 4. If one or both of these values are not as they should be, do the following:
  - Double-click the row. The **Properties** window opens.

- In the Service tab, set the Start Mode to Automatic.
- If the service is not running, in the Log On tab, select Start.
- Click **OK** to implement the changes.
- 5. On the left side of the SQL Server Configuration Manager window, select SQL Server Network Configuration > Protocols for MSSQLSERVER.

Sql Server Configuration Manager					_ 🗆 ×
File Action View Help					
🗢 🔿   🙆 🛛 🔂					
SQL Server Configuration Manager (Local)         SQL Server Network Configuration (32bit)         Protocols for MSSQLSERVER         SQL Native Client 10.0 Configuration         SQL Server Network Configuration	Protocol Name Shared Memory Named Pipes TCP/IP VIA	Status Enabled Enabled Enabled Disabled			
				J	

- 6. On the right side of the window, for TCP/IP and for Named Pipes, check that the Status is Enabled.
- 7. For each of these protocols, if it is not enabled, do the following:
  - Double-click the row. The Properties window opens.
  - In the Protocol tab, under Enabled, select Yes.
  - Click **OK** to implement the changes.

#### See also

Configuring the Reporting Services Setting the Maximum Memory Usage

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Setting Up the SQL Server > Configuring the SQL Server > Configuring the Reporting Services

### Configuring the Reporting Services

The SQL reporting services should be configured as explained below.

**Note:** You should also configure the role of the domain user account that will be used by SpeechMiner to connect to the report server (SMUSER), as explained under <u>Configuring Permissions > For UPlatform (SMUSER)</u>.

#### To configure the SQL reporting services:

- 1. In the Start menu, under All Programs, select SQL Server 2008 R2 > Configuration Tools > Reporting Services Configuration Manager. The Reporting Services Configuration Connections window opens.
- 2. Enter the report server name and the instance name (if they are not already there), and click Connect. Reporting Services

Reporting Services Configuration	Manager: \MSSQLSERVER		
SQL Server 2008 R Reporting Services Con	2 figuration Manager		
Cgnnect		guration Manager tool to define or modify settings for the Rep ing Services in files-only mode, you must configure the Web se er URL.	
🚺 Database	SQL Server Instance: Instance ID:	MSSQLSERVER MSRS10_50.MSSQLSERVER	
Report Manager URL	Edition: Product Version:	ENTERPRISE EDITION 10.50.1600.1	
🚖 E-mail Settings	Report Server Database Name: Report Server Mode:	ReportServer Native	
Kecution Account	Report Service Status:	Started	
A Encryption Keys		Stort Stop	
్ష్ వcale-out Deployment	Results		
			Сору
0		_	Apply Exit

Configuration Manager opens, with the Report Server Status screen displayed.

Report Server Status screen

- 3. Check whether the report server is running. If it is not, click Start.
- 4. On the left side of the window, select **Service Account**.

Reporting Services Configuration	Manager: T. T. MASSQLSERVER		_ 🗆 2
SQL Server 2008 RA Reporting Services Con	2		
Connect  TLVQAVM9[MSSQLSERVER  TLVQAVM9[MSSQLSERVER  Service Account  Web Service URL  Database  Report Manager URL  E-mail Settings  E-mail Settings  Execution Account  Encryption Keys  Scale-out Deployment	Report Server Service Account	count or Windows domain user account to run the report server service.	
			<u>Copy</u> Apply <b>Exit</b>

Service Account screen

- 5. Configure the account name and password of the service account that will be used to run the report-server service, as required. Use either a local administrator account or an account that can log in as a service and run services on the local machine.
- 6. On the left side of the window, select **Web Service URL**; make sure the settings in the screen match the settings in the illustration below:

Reporting Services Configuration	Manager: \MSSQLSERVE	R	
SQL Server 2008 R Reporting Services Cor	2 afiguration Manager		
Connect	Web Service URL		
TLVQAVM9(MSSQLSERVER			
💐 Service Account	Configure a URL instance, or to sp	used to access the Report Server. Click Advanced to define multiple URLs f ecify additional parameters on the URL.	or a single Report Server
A Web Service URL	Report Server Web Service V Virtual Directory:		
		ReportServer	
1 Database	Report Server Web Service :	Site identification	
Report Manager URL	IP Address:	All Assigned (Recommended)	
E-mail Settings	ICP Port:	80	
E-mail Seconds	SSL Certificate:	(Not Selected)	Advanced
Execution Account	SSL Port:		Agvanced
Recryption Keys	Report Server Web Service	IRLs	
	URLs:	http://80/ReportServer	
📩 Scale-out Deployment			
	Results		
			Сору
			Apply Exit

Web Service URL screen

7. On the left side of the window, select **Database**. If you created a report-server database when you installed SQL Server, it appears under **Current Report Server Database**. If you did not, follow the instructions <u>below</u> to create it now.

Reporting Services Configuration	Manager: LIBBYINST\MSSQLSERVER		- 0
	22		
Reporting Services Cor	∞ nfiguration Manager		
Connect	Report Server Database		
LIBBYINST			
Service Account		ores all report server content and application data in a database. Use this page to create or ver database or update database connection credentials.	
🔊 Web Service URL	Current Report Server Database		
🚺 Database	Click Change database to select	a different database or create a new database in native or SharePoint integrated mode.	
	SQL Server Name:	LIBBYINST	
Report Manager URL	Database Name: Report Server Mode:	ReportServer Native	
🚖 E-mail Settings	Report Server Mode:	Change Data	abase
Execution Account	Current Report Server Database C		
R Encryption Keys	The following credentials are us different account or update a pa	ed by the report server to connect to the report server database. Use the options below to c ssword.	noose
	Credential:	Service Account	
Scale-out Deployment	Login: Password:	Cirkle of Ladimeric	
	Password:	Change <u>C</u> rede	entials
	Results		
		Copy	
þ		Apply	Evit

#### Database screen

8. On the left side of the window, select **Report Manager URL**; make sure the settings in the screen match the settings in the illustration below:

Reporting Services Configuration	Manager: \MSSQLSERVER	
SQL Server 2008 R Reporting Services Cor	2 Ifiguration Manager	
1 Connect	Report Manager URL	
TLVQAVM9\MSSQLSERVER	Configure a URL to access Report Manager. Click Advanced to define parameters on the URL.	multiple URLs, or to specify additional
Service Account Web Service URL	Report Manager Site Identification	
Database	Virtual Directory: Reports	
Report Manager URL	URLs: http://S.wip.80/Reports	Advanced
🚖 E-mail Settings		
Execution Account		
强 Encryption Keys		
الله المعامة عنه المعامة معامة معامة معامة معامة معامة معام معامة المعامة معامة معامة معامة معامة مع معامة المعامة المعامة المعامة المعامة المعامة المعامة المعامة معامة معامة معامة معامة معامة معامة معامة معامة مع معامة المعامة المعامة المعامة المعامة المعامة المعامة المعامة معامة معامة معامة معامة معامة معامة معامة معامة مع معامة المعامة المعامة معامة م معامة معامة معام		
	Results	
0		Apply

Report Manager URL screen

9. On the left side of the window, select E-mail Settings.

10. Enter the settings for the e-mail account you want the report server to use to send reports to SpeechMiner users.

Reporting Services Configuration	Manager: TLV3\/MSSQLSERVER		
SQL Server 2008 RZ Reporting Services Con	2 figuration Manager		
Connect Connec	E-mail Settings	y an existing SMTP server and an e-mail account that can send e-mail y button. speechminer@v´;; :~n Use SMTP server s_, ~	from that
0		Apply	Copy Exit

E-mail Settings screen

11. Click Exit to close the Reporting Services Configuration Manager.

#### **Creating the Report-Server Database**

If the report-server database was not created automatically when you installed SQL Server, you can create it in the **Report Server Database Configuration Wizard**.

#### To create the report-server database:

- 1. If the Reporting Services Configuration Manager is not open, follow the instructions above to open it.
- 2. In the Database screen, under Current Report Server Database, click Change Database. The Report Server Database Configuration Wizard opens.
- 3. In the wizard, fill in the fields as they are filled in in the samples below (except, of course, for the server name and the credentials, which you must specify as appropriate for your system). Click **Next** to progress from screen to screen until you have finished creating the database.

Report Server Database	Configuration Wizard	×
Change Database Choose whether to create	or configure a report server database.	
Action Database Server Database Credentials Summary Progress and Finish	Select one of the following options to create an empty report server database an existing report server database that has content you want to use. Select a task from the following list: Cre <u>a</u> te a new report server database. Ch <u>o</u> ose an existing report server database.	e or select
0	Previous <u>N</u> ext	<u>C</u> ancel

eport Server Database (	Configuration Wizard	
Change Database Choose whether to create o	or configure a report server database.	
Action Database Server	Choose a local or remote instance of a SQL Server Database Engine and specify credentials that have permission to connect to that server.	
Database Credentials Summary Progress and Finish	Connect to the Database Server: <u>S</u> erver Name: <u>A</u> uthentication Type: <u>U</u> sername: Pass <u>w</u> ord:	SQL Server Account sa
0	1	<u>P</u> revious <u>N</u> ext <u>C</u> ancel

eport Server Database (	onfiguration Wizard	
Change Database Choose whether to create o	or configure a report server database.	
Action Database Server Database	Enter a database name, select the whether to create the database in	e language to use for running SQL scripts, and specify native or SharePoint mode.
Credentials	Database Name:	ReportServer
Summary	Temp Database Name:	ReportServerTemp
Progress and Finish	Language:	English (United States)
	Report Server Mode:	Native Mode
		C SharePoint Integrated Mode
Ø		Previous Next Cancel

Change Database			
Choose whether to create	or configure a report server database.		
Action Database Server Database	Specify the credentials of an existing account that the report server will use to connect to the report server database. Permission to access the report server database will be automatically granted to the account you specify.		
Credentials			
Summary Progress and Finish	Credentials:		_
	Authentication Type:	Service Credentials	<b>-</b>
	User name:	*SQLServiceAccount	
	Password:		
0		Previous <u>N</u> ext (	Cancel

Configuring the SQL Server Settings Setting the Maximum Memory Usage

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Setting Up the SQL Server > Configuring the SQL Server > Setting the Maximum Memory Usage

### Setting the Maximum Memory Usage

If the SQL-server's memory usage is not limited, it will consume all of the available memory. Therefore, it is recommended to limit the memory usage of the SQL Server by setting the **max server memory** value. Note that, in addition to the "server memory" that is limited by this value, the SQL server uses 2-4GB of other memory. For this reason, it is recommended to set the **max server memory** to a value that is 2-4GB lower than the maximum memory you want to allow the server to use.

For additional details, see http://msdn.microsoft.com/en-us/library/ms178067.aspx.

You can see the current max server memory value, and modify it as required, in the SQL Server Management Studio.

#### To view or modify the max server memory value:

- 1. On the SQL server, open the SQL Server Management Studio. (For example, in the Start menu, under All Programs, select Microsoft SQL Server 2008 R2 > SQL Server Management Studio.)
- 2. On the left side of the window, right-click the SQL server and then select Properties. The Server Properties window opens.

Server Properties - LIBBYI	IST	_ 🗆 🗙
Select a page	🔄 Script 👻 🚺 Help	
Memory Processors Security Connections Database Settings Advanced Permissions	Server memory options Server memory options Minimum server memory (in MB): Magimum server memory (in MB): 4096	
Connection Server: (local) Connection: CAMELOT\Lschwartz	Other memory options Index creation memory (in KB, 0 = dynamic memory): 0 Minimum memory per guery (in KB): 1024	
Progress Ready		
		OK Cancel

SQL Memory properties

- 3. On the left side of the window, select Memory. The memory settings are displayed.
- 4. Under Maximum server memory (in MB), enter the value you want to use.
- 5. Click OK. The setting is implemented, and the window closes.

If you prefer, you can also set the max server memory property by executing a query:

#### To set the max server memory by executing a query:

- 1. On the SQL server, open the SQL Server Management Studio. (For example, in the Start menu, under All Programs, select Microsoft SQL Server 2008 R2 > SQL Server Management Studio.)
- 2. On the left side of the window, right-click the SQL server and then select **New Query**. A blank text area opens on the right side of the window.
- 3. Copy the following commands and paste them into the text area:

```
sp_configure 'show advanced options', 1;
GO
RECONFIGURE;
GO
sp_configure 'max server memory', 4096;
GO
RECONFIGURE;
GO
```

- 4. The code above sets the **max server memory** to 4GB (4096MB). If you want to set it to a different value, in the text area, change "4096" to the required value.
- 5. Above the text area, select **Execute**. The commands are executed. When the process is completed successfully, **Query executed successfully** appears at the bottom of the window.



Commands executed successfully

#### See also

Configuring the SQL Server Settings Configuring the Reporting Services

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Installing IIS on the Web Server or Interaction Receiver Server

### Installing IIS on the Web Server or Interaction Receiver Server

The Internet Information Server (IIS) must be installed and operational on the servers that will be used to run the Speechminer Web and the Interaction Receiver. You can install and configure it as explained below:

- On Windows Server 2008
- On Windows Server 2012

#### Notes:

- The SpeechMiner and Interaction Receiver Application Pool must use .NET framework version 2.0. After you install the SpeechMiner web server, you should check that this is the version in use, as explained below.
- It is recommended to enable HTTP Compression on the IIS server. For additional information, see <u>http://technet.microsoft.com/en-us/library/cc771003(v=ws.10).aspx</u>.

For IIS of the Interaction Receiver server, an additional manual step is required before installing the Interaction Receiver:

- If IIS version is 7.5, install the Application Initialization module update from <a href="http://www.iis.net/downloads/microsoft/application-initialization">http://www.iis.net/downloads/microsoft/application-initialization</a>. After the installation, verify that the Application Initialization is located under Control Panel > Programs and Features > Application Initialization 1.0 for IIS 7.5.
- If IIS version is 8, you can skip this step.

See also

Installing the .NET Framework Setting Up the SQL Server Installing Report Viewer Disabling Simple File Sharing

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Installing IIS on the Web Server or Interaction Receiver Server > On Windows Server 2008

### On Windows Server 2008

On Windows Server 2008, you can install and configure the Internet Information Services (IIS) in the Server Manager.

#### To install and configure the IIS component:

- 1. In the Start menu, select All Programs > Administrative Tools > Server Manager. The Server Manager opens.
- 2. On the left side of the window, select Roles.

📙 Server Manager			
File Action View Help			
🗢 🔿 🔰 📅 🛛			
Server Manager (LIBBYINST)	Roles		
Roles     Features     Diagnostics     Configuration     Storage	View the health of the roles installed on your server and add or remove roles and features.		
	Roles Summary	Roles Summary Help	
	Roles: 0 of 17 installed	Add Roles	
	Last Refresh: Today at 8:24 PM Configure ref	resh	
	J Construction rougy at 0.24 PM Conligue rel		

Server Manager

3. On the right side of the screen, select Add Roles. The Add Roles Wizard opens.


List of roles, with Web Server (IIS) selected

- 4. In the list of roles, select Web Server (IIS), and then select Next. An Introduction to the Web Server is displayed.
- 5. Select Next. The Role Services screen opens.



**Role Services screen** 

- 6. Under Role Services, make sure the following services are selected:
  - a. Under Common HTTP Features:
    - Static Content
      - Default Document
      - Directory Browsing
      - HTTP Errors
      - HTTP Redirection
  - b. Under Application Development:
    - ASP.NET
    - ISAPI Extensions
    - ISAPI Filters

**Note:** When you select **ASP.NET**, a window pops up, asking you to confirm that you want to "Add role services required for ASP.NET." Select **Add required role services**.

- c. Under Security:
  - Windows Authentication
- d. Under IIS 6 Management Compatibility:
  - IIS 6 WMI Compatibility
  - IIS 6 Metabase Compatibility

7. Click Next. A Confirm Installation Selections screen opens.

<b>1</b>	stallation Selections
Before You Begin Server Roles Web Server (IIS)	To install the following roles, role services, or features, click Install.
Role Services	(i) This server might need to be restarted after the installation completes.
Confirmation	Web Server (IIS)
Progress Results	Find out more about Windows System Resource Manager (WSRM) and how it can help optimize CPU usage
ncouro	Web Server Common HTTP Features Static Content
	Default Document Directory Browsing
	HTTP Redirection
	Application Development
	.NET Extensibility ISAPI Extensions
	ISAPI Filters Health and Diagnostics HTTP Logging
	Request Monitor
	Print, e-mail, or save this information

**Confirm Installation Selections screen** 

8. Select **Install**. The installation process begins, and an **Installation Progress** screen is displayed. When the installation is completed, an **Installation Results** screen is displayed.

Web Server (IIS)	Web Server (IIS)	Installation succeeded	
Role Services Confirmation Progress Results	The following role services were installed: Web Server Common HTTP Features Static Content Default Document Directory Browsing HTTP Errors HTTP Redirection Application Development ASP.NET .NET Extensions ISAPI Extensions ISAPI Filters Health and Diagnostics HTTP Logging Request Monitor Security Windows Authentication		

Installation Results screen

9. Click Close. The Add Roles Wizard closes, and the Server Manager lists the Web Server (IIS) role as installed.



Server Manager listing the Web Server (IIS) role as installed

- 10. In the Server Manager, in the left pane, select Features, and then, in the right pane, select Add Features. The Add Features Wizard opens.
- 11. In the list of features, expand the **Background Intelligent Transfer Service (BITS)**, and then select **IIS Server Extension**. A window pops up, asking you to confirm that you want to "Add role services required for IIS Server Extension."



Add Features Wizard with IIS Server Extension selected

- 12. Select Add required role services. The window closes.
- 13. In the list of features, select **SMTP Server**. A window pops up, asking you to confirm that you want to "Add role services required for SMTP Server."



Add Features Wizard with SMTP Server selected

- 14. Select Add required role services. The window closes.
- 15. Click **Next** three times, and then click **Install**. The installation process begins, and an **Installation Progress** screen is displayed. When the installation is completed, an **Installation Results** screen is displayed.



Installation Results showing the IIS Server Extension and the SMTP Server were installed

16. Click Close. The Add Features Wizard closes, and the Server Manager lists the features you selected as installed.



Server Manager showing installed features

#### See also

On Windows Server 2012

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Installing IIS on the Web Server or Interaction Receiver Server > On Windows Server 2012

## On Windows Server 2012

On Windows Server 2012, you can install and configure the Internet Information Services (IIS), version 8, in the Server Manager.

To install and configure the IIS component:

1. Open the Server Manager.

<b>b</b>		Server Manager		_ <b>_ _</b> X
Server N	lanager • Dashbo	pard	• 🕲 I 🧗	Manage Tools View Help Add Roles and Features
Dashboard	WELCOME TO SERVER	MANAGER		Remove Roles and Features Add Servers Create Server Group
All Servers     File and Storage Services     IS	QUICK START	1 Configure this local server		Server Manager Properties
<b>1</b> 0 10		<ol> <li>Add roles and features</li> <li>Add other servers to manage</li> </ol>		
	WHAT'S NEW	4 Create a server group		
	LEARN MORE			Hide

#### Server Manager

2. On the upper-right side of the window, in the Manage menu, select Add Roles and Features. The Add Roles and Features Wizard opens.

	Add Roles and Features Wizard
The	d features that are required for Web Server (IIS)? following tools are required to manage this feature, but do not e to be installed on the same server.
⊿	Web Server (IIS)
	▲ Management Tools
	[Tools] IIS Management Console
~	Include management tools (if applicable)
	Add Features Cancel

#### Add Roles and Features Wizard

- 3. Select Include management tools (if applicable), and then select Next. The Installation Type screen opens.
- 4. Select Role-based or feature-based installation, and then select Next. The Server Selection screen opens.
- 5. Select the server on which you will be installing the <u>SpeechMiner web server</u>, and then select **Next**. The **Server Roles** screen opens.
- 6. In the list of roles, select **Web Server (IIS)**. A window pops up, and asks you to confirm that you want to add the role services required for the web server.

Select server ro	oles	DESTINATION SERVI tivqa4.us.int.genesyslab.co
Before You Begin Installation Type	Select one or more roles to install on the selected server. Roles	Description
Server Selection Server Roles Features Confirmation Results	<ul> <li>Active Directory Rights Management Services</li> <li>Application Server</li> <li>DHCP Server</li> <li>DNS Server</li> <li>Fax Server</li> <li>✓ File And Storage Services (Installed)</li> <li>Hyper-V</li> <li>Network Policy and Access Services</li> <li>Print and Document Services</li> <li>Remote Access</li> <li>Remote Desktop Services</li> <li>Volume Activation Services</li> <li>Windows Deployment Services</li> <li>Windows Server Update Services</li> </ul>	Web Server (IIS) provides a reliable manageable, and scalable Web application infrastructure.

Add Roles and Features Wizard, Server Roles screen

- 7. In the popup window, select Add Features. The pop-up window closes.
- 8. Select Next. The Features screen opens.
- 9. In the list of features, expand **Background Intelligent Transfer Service**, and then select **IIS Server Extention**. A window pops up, and asks you to confirm that you want to add the role services required for the IIS server extension.
- 10. In the popup window, select Add Features. The pop-up window closes.
- 11. In the list of features, select **SMTP Server**. A window pops up, and asks you to confirm that you want to add the role services required for the SMTP server.



Add Roles and Features Wizard, Features screen

- 12. In the popup window, select Add Features. The pop-up window closes.
- 13. Select Next. The Role Services screen opens.



Add Roles and Features Wizard, Role Services screen

- 14. In the list of role services, make sure the following services are selected:
  - a. Under Common HTTP Features:
    - Static Content
    - Default Document
    - Directory Browsing
    - HTTP Errors
    - HTTP Redirection
  - b. Under Application Development:
    - ASP.NET
    - ASP.NET Extensibility
    - ISAPI Extensions
    - ISAPI Filters
  - c. Under Security:
    - Windows Authentication
  - d. Under IIS Management tools:
    - IIS 6 Management Compatibility
    - IIS Management Console
- 15. Select Next, and the select Install. The IIS server is installed with the roles and features you selected.

### See also

#### On Windows Server 2008

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Installing Report Viewer

### Installing Report Viewer

SpeechMiner can be configured to use Microsoft's Report Viewer to run saved reports at night and cache their results. Using it can significantly reduce the time required to load the Views page of the SpeechMiner browser-based interface, if it contains a large number of reports. If you want to use this feature, you have to install it and then configure it to run the jobs you want it to run. You can download the installation file at <a href="http://www.microsoft.com/en-us/download/details.aspx?id=21916">http://www.microsoft.com/en-us/download/details.aspx?id=21916</a>.

### See also

Installing the .NET Framework Setting Up the SQL Server Installing IIS on the Web Server or Interaction Receiver Server Disabling Simple File Sharing

Home > Installing SpeechMiner > Before You Begin > Setting Up the Required Software > Disabling Simple File Sharing

# Disabling Simple File Sharing

Simple file sharing should be disabled on all machines on which SpeechMiner components will run.

#### To disable simple file sharing:

- 1. From Windows Explorer or the Control Panel, open the Folder Options.
- 2. In the View tab, clear the Use simple file sharing (Recommended) checkbox.

Folder Options			<b>?</b> ×
General View File 1	ypes Offline File:	5	
you are	n apply the view (s using for this folde y to All Folders	uch as Details or Tiles) r to all folders. Reset All Folders	that
Advanced settings:			
<ul> <li>Managing p</li> <li>Show ar</li> <li>Show br</li> <li>Show br</li> <li>Show br</li> <li>Remember ar</li> <li>Restore prevention</li> <li>Show Contra</li> <li>Show contra</li> <li>Show encry</li> <li>Show pop-u</li> </ul>	oth parts but manage each folder's view s vious folder window of Panel in My Com oted or compressed	and folders as a single file ge them individually ge as a single file ettings vs at logon puter d NTFS files in color der and desktop items	
		Restore Defa	aults
	ОК	Cancel	Apply

Folder Options

3. Select OK.

### See also

Installing the .NET Framework Setting Up the SQL Server Installing IIS on the Web Server or Interaction Receiver Server Installing Report Viewer

Home > Installing SpeechMiner > Before You Begin > Pre-installation Checklist

# Pre-installation Checklist

Before you begin installing SpeechMiner, ensure the following:

- 1. You have the required hardware (see <u>Requirements</u>).
- 2. You have received the following from Genesys:
  - SpeechMiner installation package
    - Licenses
- 3. **Space check:** The hard drives of the machines on which you are planning to install the system components have sufficient space available for those components (see <u>System Requirements</u>).
- 4. **OS check:** All machines have supported operating systems (see <u>System Requirements</u>).
- 5. Machine connectivity: All machines are functional and connected to the network.
- 6. Admin user: The user account that will be used to install the components has Administrator permissions on all machines on which components will be installed.
- 7. .NET Framework: Microsoft .NET Framework 3.5 SP1 is installed on all machines (see Installing the .NET Framework).
- SQL Server: Microsoft SQL Server with Reporting Services (2008 or 2012) is installed and configured on the database server (see Installing the SQL Server).
- 9. **IIS installation:** The Internet Information Server component is installed and operational on the Web server and Interaction Receiver server (see <u>Installing IIS on the Web Server</u>).
- 10. Report Viewer installation: Optional Report Viewer is installed if it is required (see Installing Report Viewer).
- 11. File sharing: Simple file sharing is disabled on all machines (see Disabling Simple File Sharing).
- 12. Audio capabilities: Machines on which the SpeechMiner web application will run have functioning audio devices, and Windows Media Player version 10 or 11 installed (see <u>Requirements</u>).

#### See also

Setting Up the Required Software

Home > Installing SpeechMiner > Installing the Components

# Installing the Components

The setup wizard is used to install all SpeechMiner components. You can run it separately on each machine on which you are installing SpeechMiner components on the same machine, you can install them at the same time. For example, if you are installing the database server and the web server on the same machine, you can select both of them in the setup wizard. In most systems, SMConfig is installed on all server machines.

The beginning and end of the installation process is the same regardless of which components you are installing: At the beginning, you start the wizard, accept the license agreement, select the mode (Analytics and Recording UI, Analytics Only, or Recording UI Only), and select the components you want to install on the current machine. At the end, you choose the installation folder, the installation is performed, and then you restart the machine. The steps in between depend on which components you are installing.

#### To install components using the setup wizard:

- 1. Open the installation package.
- 2. In the FullInstaller folder, run SpeechMinerInstall.exe. The setup wizard opens, with the Welcome screen displayed.
- 3. Click Next. The License Agreement screen opens.

4. Select I accept the terms of the license agreement, and then click Next. The Installation Type screen opens.

SpeechMiner 8.5 Setup			
Installation type Please choose the installation type			9
Analytics and Recording UI			
C Recording UI Only			
C Analytics Only			
Nullsoft Install System v2,44	< Back	Next >	Cancel

#### Installation Type screen

- 5. Select the installaion mode, as follows:
  - Analytics and Recording UI: SpeechMiner plays back, and analyzes the Genesys Interaction Recording recorded calls/interactions, and records of other interactions, and process the contents of these calls/interactions.
  - Recording UI only: SpeechMiner plays back the call audio and displays the other interactions, but the contents
    of the interactions are not processed by the speech-analytics system.
  - Analytics only: SpeechMiner imports recorded call audio and records of other interactions from any recording
    system, and uses its speech-analytics system to process the contents of the interactions.
- 6. Click Next. The Choose Components screen opens.

unoose which reatures of Spee	chMiner 8.5 you want to install	. 9
Check the components you war nstall. Click Next to continue.	nt to install and uncheck the co	mponents you don't want to
Select components to install:		Description
select components to install:	Uplatform Smart	Position your mouse over a component to
	Veb Web	see its description.
	SMConfig	
	SMUpgrade	
	Interaction Receiver Nuance License	
Space required: 606.4MB	Database	
	1	

**Choose Components screen** 

Component	Description	Select
Database	The SpeechMiner database, which stores the interaction data and the results of interaction processing <b>Note:</b> Usually installed on a dedicated machine.	Required: Database Optional: SMConfig Note: For additional information about installing the database server, see Installing the SpeechMiner Database.
Web	The SpeechMiner web site, which is the interface that enables users to view and work with the interaction data after it has been processed.	Required: Web, ULogger Optional: SMConfig
Uplatform server	The UPlatform server, which manages all the processing tasks of SpeechMiner - fetching, recognition, categorization, exploration, compression, and indexing.	Required: Uplatform Optional: Ulogger, Nuance License, SMConfig Note: For additional information about installing the Uplatform server, see Installing the UPlatform Server.
Interaction Receiver	A web service which is installed just in the case of Recording+Analytics/Recording only modes. It handles the fetching of calls (audio and metadata) coming from Genesys Interaction Recording system.	Required: Interaction Receiver, ULogger
Nuance License server	The server that managers the Nuance engine. During installation, you need to either install a new instance of the Nuance License server, or provide the details of an existing server.	Required: Nuance License, ULogger
SMConfig	An application that is used by system administrators for configuring SpeechMiner. <b>Note:</b> SMConfig is typically installed on all of the servers that are part of the SpeechMiner system. It can be installed on any machine that is connected to the network on which SpeechMiner is running.	Required: SMConfig, ULogger
SMART	The SpeechMiner Administration Tool (SMART), an application that enables users to configure the speech-analytics system to search interactions for specific topics and other characteristics. <b>Note:</b> SMART should be installed on the work station of each user who will be using it.	<b>Required:</b> SMART, ULogger <b>Note:</b> For additional information about installing the Uplatform server, see <u>Installing SMART</u> .
SMUpgrade	An application used to upgrade the SpeechMiner database from the previous version to current version.	Required: ULogger

7. In the list of components, select the components you want to install on the machine, as follows:

8. Click Next. Which screen you see next depends on the components you selected in the previous screen.

- If you are installing the Uplatform, see <u>Installing the UPlatform Server</u>.
- If you are installing SMART, see Installing SMART.
- If you are installing the database, see Installing the SpeechMiner Database.
- Otherwise, the **Choose Install Location** screen opens.

SpeechMiner 8.5 Setup		
Choose Install Location Choose the folder in which to install S	SpeechMiner 8, 5,	6
Setup will install SpeechMiner 8.5 in t	•	erent folder, dick
Browse and select another folder. Cli		
De Factor Faller		
C:\Program Files (x86)\Genesys	Software	Browse
Space required: 358.9MB		
Space available: 9.9GB		
Vullsoft Install System v2,44	< Back Install	Cancel

**Choose Install Location screen** 

9. Modify the default installation location if necessary, and then click **Install**. The installation process begins. When the process is completed, the following screen appears:

SpeechMiner 8.5 Setup	
	Completing the SpeechMiner 8.5 Setup Wizard In order to complete the installation, you need to restart your system
A	<ul> <li>Restart Now</li> <li>Restart Later</li> </ul>
	< Back Finish Cancel

Installation completed

10. Select **Restart Now**, and then click **Finish**. A warning message appears, and reminds you to configure SpeechMiner before you open it.



#### Warning message

11. Click OK. The server restarts.

### See also

System Requirements What Is Installed Ports Used by System Components Before You Begin Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Installing the SpeechMiner Database

## Installing the SpeechMiner Database

The SpeechMiner database stores the interaction data and the results of interaction processing. It is usually installed on a dedicated machine. This section explains how to install the SpeechMiner database.

### See also

Running the Setup Wizard Alternative Method for Installing the Database Server Creating the Storage Partitions Configuring the Database Maintenance Job Deploying the SQL CLR Configuing the Recovery Model Configuring the Autogrowth

System Requirements What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the Components Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Installing the SpeechMiner Database > Running the Setup Wizard

# Running the Setup Wizard

To begin the installation of the database server, run the setup wizard as described under Installing the Components.

#### To install the database server:

- 1. On the database server machine, run the Setup Wizard, as described under Installing the Components.
- 2. Follow the instructions there, until the Database Credentials screen opens.

Please enter the	credentials of the Database administrator	
Windows Au	thenticated user	
DB Server		
DB Name	speechminer_ver8_5	
DB User		
DB Password		

#### Database credentials screen

3. In the Database Credentials screen, fill in the fields as follows:

Field	Description
Windows Authenticated User	Select this option to use the Windows username and password you used to log into the machine as the <b>DB User</b> and <b>DB Password</b> . When you select this option, the <b>DB User</b> and <b>DB Password</b> become unavailable.
DB Server	Enter the name of the server on which you want to install the SpeechMiner database. If you want to install the database on an SQL Named Instance, the server name should be entered as server_name\instance_name.
DB Name	Enter the name of the database in the format <i>speechminer_verX_Y</i> (e.g. <i>speechminer_ver8_5</i> ).
DB User	Enter <b>sa</b> . (The credentials of the user name entered here will be used for the process of creating the SpeechMiner database.) <b>Note:</b> This field is not available when <b>Windows Authenticated User</b> is selected above.
DB Password	Enter the password of the SA account. <b>Note:</b> This field is not available when <b>Windows Authenticated User</b> is selected above.

- 4. Click Next. The Choose Install Location screen opens.
- 5. Modify the default installation location if necessary, and then click **Install**. The installation process begins. When the process is completed select **Restart Now**, and then click **Finish**. A warning message appears.
- 6. In the warning message, click **OK**. The server restarts.
- 7. After the database-server installation is completed, check that the speechminer\_verX\_Y database is present. This can be done by opening **SQL Server Management Studio** on the SQL server (for example, in the **Start** menu, under **All Programs**,

select Microsoft SQL Server 2008 R2 > SQL Server Management Studio) and reviewing the list of databases on the server.



SpeechMiner database in SQL Server Management Studio

### See also

Alternative Method for Installing the Database Server Creating the Storage Partitions Configuring the Database Maintenance Job Deploying the SQL CLR Configuing the Recovery Model Configuring the Autogrowth

Home > Installing SpeechMiner > Installing the SpeechMiner Database > Alternative Method for Installing the Database Server

## Alternative Method for Installing the Database Server

An alternative way to perform the database-server installation is to use data\_ver8\_1\_sql2005.bak (an SQL backup file) deployed in C:\Program Files (x86)\Genesys\Software\Support during any regular server install. Restore this backup on the SQL server and choose settings based on the settings in the steps above. After restoration is complete, update the database properties as follows:

 For both the Data and Log files, change Options\Recovery Mode to Simple and change the Files\Autogrowth\File Growth parameter to 10%.

In addition, run the following commands to create the dbuser user:

- On the master database: create login [dbuser] with password='dbuser', check\_policy=OFF
- On the new database: EXEC sp\_change\_users\_login 'Auto\_Fix', 'dbuser'

#### See also

Running the Setup Wizard Creating the Storage Partitions Configuring the Database Maintenance Job Deploying the SQL CLR Configuing the Recovery Model Configuring the Autogrowth

Home > Installing SpeechMiner > Installing the SpeechMiner Database > Creating the Storage Partitions

# Creating the Storage Partitions

If the database server is an Enterprise Edition, you must create the storage partitions on the database. To do this, after you install the database server, run the following SQL query on the SpeechMiner database:

EXEC sp\_create\_DB\_storage\_partitions





Note: For information about how to open SQL Server Management Studio and run a query, see <u>Setting the Maximum Memory</u> <u>Usage</u>.

### See also

Running the Setup Wizard Alternative Method for Installing the Database Server Configuring the Database Maintenance Job Deploying the SQL CLR Configuing the Recovery Model Configuring the Autogrowth

Home > Installing SpeechMiner > Installing the SpeechMiner Database > Configuring the Database Maintenance Job

# Configuring the Database Maintenance Job

When the database was installed, a database maintenance job was automatically created. The job's name is **SpeechMiner\_Maintenance\_job - <database>**. You should schedule it to run daily or weekly at a time when call volume is expected to be low. In addition to scheduling the job to run, you can also modify it to suit your requirements.

By default, the maintenance job does the following:

- 1. Shuts down the system
- 2. Rebuilds fragmented database table indexes
- 3. Restarts the system
- 4. Purges logs of messages that are older than one month
- 5. Purges logs of user events that are older than one year
- 6. Purges the report agent filter by removing entries that are older than 30 days and creating a new list of agents

#### To open the maintenance-job script:

In SQL Server Management Studio, under Databases > SQL Server Agent > Jobs, double-click the job.



Jobs listed under SQL Server Agent

📧 Job Properties - SpeechMin	er_Maintenance_job - speech	miner_ver8_5	- 🗆 ×
Select a page	🔄 Script 👻 📑 Help		
Steps	<u>N</u> ame:	SpeechMiner_Maintenance_job - speechminer_ver8_5	
Alerts	<u>O</u> wner:	dbuser	
Targets	<u>C</u> ategory:	Database Maintenance	▼ <u></u>
Connection	<u>D</u> escription:	No description available.	
Server: (local)	✓ Enabled		
Connection: CAMPER PErshwatz	Source:		
View connection properties	Created:	1/30/2014 5:03:18 PM	
Progress	Last modified:	1/30/2014 5:03:18 PM	
Ready	Last executed:		
Transfer and the second	View Job History		
		ок с	ancel

SpeechMiner maintenance job script

The job may optionally include the **updateUntilYesterdayMaxChannels** and **sp\_agentFilterCleanByDays** jobs. In addition, any procedure that rebuilds indexes and purges old calls should be added as a step in the maintenance job.

**Note:** If information about the agents and their hierarchy is not available through the UConnector, you can include the <u>sp\_createAgentsFromPartitions</u> job in this job.

### Changing the Job Owner to SA

If you include the **updateUntilYesterdayMaxChannels** job in the maintenance job, you must enter **SA** credentials in the job's **Owner** field.

#### To enter SA credentials into the Owner field:

- 1. Under Databases > SQL Server Agent > Jobs double-click the updateUntilYesterdayMaxChannels job. The Properties window opens.
- 2. In the General section, in the Owner field, replace dbuser with sa.
- 3. Click **OK**. The change is implemented.

### See also

Running the Setup Wizard Alternative Method for Installing the Database Server Creating the Storage Partitions Deploying the SQL CLR Configuing the Recovery Model Configuring the Autogrowth

Home > Installing SpeechMiner > Installing the SpeechMiner Database > Deploying the SQL CLR

# Deploying the SQL CLR

After you install the database, you should deploy the SQL Common Language Runtime (CLR) assembly on the SQL server. To do this, on the Master, you must set the permissions of the xmlserializers.dll and enable xp\_cmdshell and CLR integration, as explained below.

**Note:** In order to set the permissions, the user running the SQL services must have modify permissions on sqlclr.XmlSerializers.dll.

#### To deploy the SQL CLR:

- 1. On the SQL server, open the SQL Server Management Studio. (For example, in the Start menu, under All Programs, select Microsoft SQL Server 2008 R2 > SQL Server Management Studio.)
- 2. On the left side of the window, right-click the SQL server and then select **New Query**. A blank text area opens on the right side of the window.
- 3. Copy the following commands and paste them into the text area:

```
use [master]
CREATE ASYMMETRIC KEY SQLCLRTestKey FROM EXECUTABLE FILE =
'\\<Machine_Name>\c$\Program Files
(x86)\Genesys\Software\Support\sqlclr.XmlSerializers.dll'
GO
use [master]
CREATE LOGIN SQLCLRTestLogin FROM ASYMMETRIC KEY SQLCLRTestKey
GO
use [master]
GRANT EXTERNAL ACCESS ASSEMBLY TO SQLCLRTestLogin
```

4. In the text area, change <Machine\_Name> to the name of the machine on which the SpeechMiner database was installed.



#### Query ready to run

5. Above the text area, select **Execute**. The commands are executed. When the process is completed successfully, **Query** executed successfully appears at the bottom of the window.

**Note:** If you get an error message that says, "The certificate, asymmetric key, or private key file does not exist or has invalid format," try changing the path to point at the local drive, e.g. C:\Program Files (x86)\Genesys\Software\Support\sqlclr.XmlSerializers.dll

- 6. Open another New Query.
- 7. Copy the following commands and paste them into the New Query text area:

```
EXEC sp_configure 'show advanced options', 1
GO
RECONFIGURE
GO
EXEC sp_configure 'xp_cmdshell', 1
GO
EXEC sp_configure 'clr_enabled', 1
GO
RECONFIGURE
GO
```

- 8. Above the text area, select **Execute**. The commands are executed. When the process is completed successfully,
  - xp\_cmdshell and CLR integration are enabled, and **Query executed successfully** appears at the bottom of the window.



Query executed successfully

### See also

Running the Setup Wizard Alternative Method for Installing the Database Server Creating the Storage Partitions Configuring the Database Maintenance Job Configuing the Recovery Model Configuring the Autogrowth

Home > Installing SpeechMiner > Installing the SpeechMiner Database > Configuing the Recovery Model

# Configuing the Recovery Model

In order to save disk space, it is recommended to set the recovery model of the SpeechMiner database to Simple.

To set the recovery model to Simple:

- 1. On the SQL server, open the SQL Server Management Studio. (For example, in the Start menu, under All Programs, select Microsoft SQL Server 2008 R2 > SQL Server Management Studio.)
- 2. On the left side of the window, right-click the database and then select **Properties**. The **Database Properties** window opens.
- 3. On the left side of the window, select Options.
- 4. On the right side of the screen, under Recovery model, select Simple.

📒 Database Properties - spee	chminer_ver8_5		_ 🗆 ×
Select a page	Script - 📑 Help		
General			
Files	Collection		
Filegroups	Collation: S	QL_Latin1_General_CP1_CI_AS	<u> </u>
Options	Recovery model: S	imple	•
Change Tracking	Compatibility level:	QL Server 2005 (90)	-
Permissions	Company tever. 10	ac Server 2003 (50)	
Extended Properties	Other options:		
Mirroring	2↓ □		
Transaction Log Shipping			
	Automatic		<u> </u>
	Auto Close	False	
	Auto Create Statistics	True	
	Auto Shrink	False	
	Auto Update Statistics	True	
	Auto Update Statistics Asynchronously	False	
	Close Cursor on Commit Enabled	False	
	Default Cursor	GLOBAL	
	ANSI NULL Default	False	
Connection	ANSI NULLS Enabled	False	
	ANSI Padding Enabled	False	
Server: (local)	ANSI Warnings Enabled Arithmetic Abort Enabled	False	
(local)	Concatenate Null Yields Null	False	
Connection:			
CAMELOT\Lschwartz	Cross-database Ownership Chaining Er Date Correlation Optimization Enabled	False	
View connection properties	Numeric Round-Abort	False	
_	Parameterization	Simple	
Progress		Simple	<u> </u>
	ANSI NULL Default		
Ready			
"Papp"			
			-
		OK	Cancel
			/

Data Properties window with Options screen displayed

5. Click OK. The setting is implemented, and the window closes.

#### See also

Running the Setup Wizard Alternative Method for Installing the Database Server Creating the Storage Partitions Configuring the Database Maintenance Job Deploying the SQL CLR Configuring the Autogrowth

Home > Installing SpeechMiner > Installing the SpeechMiner Database > Configuring the Autogrowth

# Configuring the Autogrowth

By default, autogrowth for the SpeechMiner database file is enabled for file growth, and set to 1 MB. It is recommended to keep autogrowth for file growth enabled, but to change the setting to 5% or 10%.

#### To modify the autogrowth settings:

- 1. On the SQL server, open the SQL Server Management Studio. (For example, in the Start menu, under All Programs, select Microsoft SQL Server 2008 R2 > SQL Server Management Studio.)
- 2. On the left side of the window, right-click the database and then select **Properties**. The **Database Properties** window opens.
- 3. On the left side of the window, select Files.

Database Properties - speed	hminer_ver8_5					_ 🗆 🗵
Select a page	式 Script 🝷 🚺 H	elp				
General Files Options Change Tracking Permissions Extended Properties	Database name: Qwner: IV Use full text in Database files:	dexing	speechmine CANELIO P			
Transaction Log Shipping	Logical Name	File Type	Filegroup	Initial Size (MB)	Autogrowth	Path
	data_ver8_5	Rows	PRIMARY	276	By 1 MB, unrestricted growth	C:\Program Files\A
	data_ver8_5	Log	Not Applicable	320	By 1 MB, restricted growth to 209	C:\Program Files
Connection Server: (local) Connection: Cell March Valach vol L Vew connection properties Progress Ready	۲.				Add	▶ <u>R</u> emove
					ОК	Cancel

Database Properties: Files screen

Change Autogrowth for data_ver	8_5
☑ Enable Autogrowth	
File Growth	
O In <u>P</u> ercent	10 -
In <u>Megabytes</u>	1 =
Maximum File Size	
C Restricted File Growth (MB)	100 -
Unrestricted File Growth	
[	OK Cancel

Change Autogrowth dialog box: "In Megabytes" selected

5. Under File Growth, select In Percent, and then, in the text box on the right, specify the percentage.

Change Autogrowth for data_ver8_5	×
Enable Autogrowth	
File Growth	
In Percent	10 🛨
◯ In <u>M</u> egabytes	1 📩
Maximum File Size	
C Restricted File Growth (MB)	100 🛨
<u>U</u> nrestricted File Growth	
ОК	Cancel

Change Autogrowth dialog box: "In Percent" selected

- 6. Click **OK**. The setting is changed in the **Properties** window.
- 7. In the **Properties** window, click **OK**. The setting is implemented, and the window closes.

🧾 Database Properties - spee	chminer_ver8_5					- 0
Select a page	🖾 Script 🝷 🚺 H	elp				
General Files Filegroups Options Change Tracking	Database name: Qwner:		speechmin CANZIN			
Permissions Extended Properties	₩ Use full-text in	dexing				
Mirroring Transaction Log Shipping	Database files:		1		1	1
indisaction bog Snipping	Logical Name	File Type	Filegroup	Initial Size (MB)	Autogrowth	Path
	data_ver8_5	Rows	PRIMARY	276	By 10 percent, unrestricted growth	C:\Program Files
	data_ver8_5	Log	Not Applicable	320	By 1 MB, restricted growth to 209	C:\Program Files
Connection Server: (local) Connection:						
UVD.ENDINENDINE LA						
Progress						
Ready					Add	Bemove
					ОК	Cancel

Database Properties: Autogrowth set to 10%

### See also

Running the Setup Wizard Alternative Method for Installing the Database Server Creating the Storage Partitions Configuring the Database Maintenance Job Deploying the SQL CLR Configuing the Recovery Model

Home > Installing SpeechMiner > Installing the SpeechMiner Web

# Installing the SpeechMiner Web

The SpeechMiner web runs the interface that enables users to view and work with the interaction data after it has been processed. You can install the web server on one or more machines in your system, as required. To install the web server, run the Setup Wizard, as described under <u>Installing the Components</u>.

Note: Once SpeechMiner is installed and configured, users can open the web-based interfaces from their browsers at http://<webserver\_name>/speechminer (where <web server> is the name of a machine on which the SpeechMiner is installed.

The SpeechMiner application pool uses v2.0 of the .Net framework, and not a later version. After you install the SpeechMiner web server on a machine, you should check that this setting is correct.

To check the settings of the SpeechMiner application pool:

- 1. In the Start menu, select Administrative Tools > Internet Information Server (IIS) Manager. The Internet Information Server (IIS) Manager opens.
- 2. In the left pane, expand the server name, and select **Application Pools**. The currently defined application pools are listed in the middle pane.

Internet Information Service					-02
CO CO LIBBYINST	<ul> <li>Application Pools</li> </ul>				<u>∞</u> ≈ 🖄 I 🛛 •
File View Help					
Connections		Pools manage the list of application pools on the ain one or more applications, and provide i			Actions Add Application Pool Set Application Pool Defaults Application Pool Tasks
E Sites	Filter:	Go - Show All   Group by:	No Grouping		Start
	Name - Classic .NET AppPool	Status .NET Framework Version Started v2.0	Managed Pipeline M Classic	Identity ApplicationP.	Stop Stop Recycle
	DefaultAppPool	Started v2.0 Started v2.0	Integrated Integrated	ApplicationP. ApplicationP.	Edit Application Pool Basic Settings Recycling Advanced Settings Rename
					X Remove
					View Applications
	4			2	Help     Online Help
<u> </u>	Features View	nt View			
Ready					କ୍ଲ

#### **IIS Manager: Application Pools**

- Under .NET Framework Version, check the version number listed for the SpeechMiner application pool. If the number is "2.0," you do not have to make any changes. If it is not, double-click the version number. The Edit Application Pool dialog box opens.
- 4. Under .NET Framework version, select v2.0.

Edit Application Pool	? ×
Name:	
DefaultAppPool	
.NET Framework version:	
.NET Framework v2.0.50727	-
Managed pipeline mode: Integrated	
Start application pool immediately	
OK Cance	el

Edit Application Pool dialog box

5. Click OK.

See also

System Requirements What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the Components Installing the SpeechMiner Database Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Installing the Interaction Receiver

# Installing the Interaction Receiver

The SpeechMiner Interaction Receiver runs the service that fetches the calls (audio and metadata) from the Genesys Interaction Recording system. To install the Interaction Receiver, run the Setup Wizard, as described under <u>Installing the Components</u>.

The Interaction Receiver application pool uses v2.0 of the .Net framework, and not a later version. After you install the SpeechMiner Interaction Receiver on a machine, you should check that this setting is correct.

To check the settings of the Interaction Receiver application pool:

- 1. In the Start menu, select Administrative Tools > Internet Information Server (IIS) Manager. The Internet Information Server (IIS) Manager opens.
- 2. In the left pane, expand the server name, and select **Application Pools**. The currently defined application pools are listed in the middle pane.



#### **IIS Manager: Application Pools**

- Under .NET Framework Version, check the version number listed for the SpeechMiner application pool. If the number is "2.0," you do not have to make any changes. If it is not, double-click the version number. The Edit Application Pool dialog box opens.
- 4. Under .NET Framework version, select v2.0.

Edit Application Pool	? ×
Name:	
DefaultAppPool	
.NET Framework version:	
.NET Framework v2.0.50727	-
Managed pipeline mode:	
Integrated 💌	
Start application pool immediately	
OK Cance	

Edit Application Pool dialog box

5. Click OK.

### See also

System Requirements What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the UPlatform Server Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Installing the UPlatform Server

# Installing the UPlatform Server

The UPlatform server manages all the processing tasks of SpeechMiner - fetching, recognition, categorization, exploration, compression, and indexing. This section explains how to install the SpeechMiner UPlatform server. It should be installed on all machines on which SpeechMiner processing tasks take place. You can install the UPlatform server on one or more machines in your system, as required.

**Note:** After you have installed the UPlatform server and created the required folders, it is recommended to turn off error reporting on the server. For additional information, see <u>http://technet.microsoft.com/en-us/library/cc754364.aspx</u>.

#### See also

Running the Setup Wizard Creating the Required Folders

System Requirements What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing SMART Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Installing the UPlatform Server > Running the Setup Wizard

# Running the Setup Wizard

To begin the installation of the Uplatform server, run the setup wizard as described under Installing the Components.

#### To install the Uplatform server:

- 1. On the Uplatform server machine, run the Setup Wizard, as described under Installing the Components.
- 2. Follow the instructions there, until the Choose Components screen opens.

choose which readilies of spec	chMiner 8.5 you want to install	
Check the components you wa nstall. Click Next to continue.	nt to install and uncheck the co	mponents you don't want to
Select components to install:	Uplatform	Utility for upgrading
	Web	Database from the previous version
	SMConfig	
	SMUpgrade	
Space required: 345.2MB	Interaction Receiver Nuance License	
space required: 343.2Mb	Database	

#### **Choose Components screen**

3. In the Choose Components screen, select the components as follows:

Component	Comments
Uplatform	
ULogger	It is recommended to install ULogger on any machine on which Uplatform is installed.
Interaction Receiver	If you are installing SpeechMiner in either Analytics and Recording UI mode, or Recording UI Only mode, select this option. You can also install this component on a separate server.

Nuance License	If you are installing SpeechMiner in either Analytics and Recording UI mode, or Analytics Only mode, Uplatform must have access to a Nuance license server. You can install the license server anywhere in your network. If you want to install the Nuance license server on this machine, select this.
	If you do not select <b>Nuance License</b> , and you are installing SpeechMiner in either Analytics and Recording UI mode, or Analytics Only mode, you will be prompted, in the next screen, to enter the name of one or more existing Nuance license servers.
SMConfig	If you want to use SMConfig on the machine, select it.

### 4. Click Next.

- If you included **Nuance License** in the components you selected, the **Language Selection** screen opens. Skip the next step.
- If you did not include Nuance License, the Nuance License screen opens.
- 5. In the Nuance License screen, enter the names of one or more Nuance license servers you want to use, as explained in the screen, and then click Next.

Nuance License			6	
Please enter nuance license servers as a list of port@server combinations separated by semi-colon				
,				
ilsoft Install System v2,44				

Nuance License screen

6. In the Language Selection screen, select the languages you want to install.

SpeechMiner 8.5 Setup	_ 🗆 🗙			
Languages Selection Please select the languages you would like to install				
American English  American English  Canadian French  Catalan  Australian English  UK English  European French  German  Italian  European Spanish  UK English				
Latin American Spanish Nullsoft Install System v2:44  Kack Next >	Cancel			

#### Language Selection screen

- 7. Click Next. The Choose Install Location screen opens.
- 8. Modify the default installation location if necessary, and then click **Install**. The installation process begins. When the process is completed select **Restart Now**, and then click **Finish**. A warning message appears.
- 9. In the warning message, click OK. The server restarts.

#### See also

#### Creating the Required Folders

Home > Installing SpeechMiner > Installing the UPlatform Server > Creating the Required Folders

# Creating the Required Folders

After you install the UPlatform server, manually create the shared folders listed below. These folders will be used by SpeechMiner to store the audio, index, and backup files used by the system; ensure that enough storage space is available for these purposes on the machines on which you create the folders. All SpeechMiner machines should have access to these shared folders, and they should be shared with all groups and users that require access to them. It is recommended to create the folders on the same LAN as the SpeechMiner system components.

The folder names listed below are recommended, for convenience, but you can actually use any names you choose. In addition, you can create multiple folders for most of the folder types, as explained below. For information about configurating SpeechMiner to use these folders, see <u>Sites & Machines</u>.

**Note:** When you configure the shares, make sure to specifically give write permissions to the user installing SpeechMiner and to the system user (<u>SMUSER</u>), both under Sharing and under Security.

Folder Name	Description	Quantity
Input	Folder in which interactions data and metadata will be placed by Uconnector when it retrieves them from the recording system; fetchers collect the data from input folders, prepare it for processing by SpeechMiner, and then place it into store folders	One folder for each fetcher task; if there are multiple recording systems, or multiple storage media used for storing the unprocessed data, a fetcher task must be created for each data source and for each input folder. For information about deciding how many fetchers to create, see <u>Configuring Machines and Tasks</u> .
Interaction Receiver Input	Folder in which the audio files that are received from the Genesys Interaction Recording solution will be placed, and later processed by the Interaction Receiver. <b>Note:</b> This is a different folder than the Input folder which is used by fetchers.	
----------------------------------	--	---
Store	Folder in which interactions will be placed by fetchers to await processing by SpeechMiner	The system can have multiple store folders - for example, if there are multiple storage media used for storing the processed data, you can create a folder on each of them.
Filtered	Folder in which interactions with non-existant or inactive Programs will be placed	One for each site in the system
Grammar	The "package" folder, in which the rules for processing voice interactions, including those defined in SMART, are stored	One for the entire system <b>Note:</b> If you want to have more than one copy of the folder, you can create additional folders and configure SpeechMiner to use them. If you do this, SpeechMiner will save the same content in each of the folders, so that you will have backups.
Index	Folder in which the system will store an index of calls, metadata, and events, so that they can be found quickly during searches	One for the entire system
Backup	Folder in which SpeechMiner will store backups of SMART definition sets (Program, Topic, and Category definitions)	One for the entire system <b>Note:</b> If you want to have more than one copy of the folder, you can create additional folders and configure SpeechMiner to use them. If you do this, SpeechMiner will save the same content in each of the folders, so that you will have backups.

### See also

Running the Setup Wizard

Home > Installing SpeechMiner > Installing SMART

## Installing SMART

The SpeechMiner Administration Tool (SMART) is an application that enables users to configure the Speech Analytics system to search interactions for specific topics and other characteristics. SMART should be installed on the work station of each user who will be using it.

#### To install SMART on a user's computer:

- 1. On the Uplatform server machine, run the Setup Wizard, as described under Installing the Components.
- 2. Follow the instructions there, until the Choose Components screen opens.

SpeechMiner 8.5 Setup		_ 🗆 🗙
Choose Components Choose which features of Spee	chMiner 8.5 you want to install.	9
Check the components you war install. Click Next to continue.	nt to install and uncheck the com	ponents you don't want to
Select components to install:	Uplatform Smart Web SMConfig Ulogger SMUpgrade Interaction Receiver	Description Utility for upgrading Database from the previous version
Space required: 423.4MB	Nuance License Database	
Nullsoft Install System v2.44		
	< Back	Next > Cancel

#### **Choose Components screen**

3. In the Choose Components screen, select the components as follows:

Component	Comments			
Smart				
ULogger	It is recommended to install ULogger on any machine on which Uplatform is installed.			
Nuance License	If you are installing SpeechMiner in either Analytics and Recording UI mode, or Analytics Only mode, Smart must have access to a Nuance license server. You can install the license server anywhere in your network. If you want to install the Nuance license server on this machine, select this.			
	If you do not select <b>Nuance License</b> , and you are installing SpeechMiner in either Analytics and Recording UI mode, or Analytics Only mode, you will be prompted, in the next screen, to enter the name of one or more existing Nuance license servers.			
SMConfig	If you want to use SMConfig on the machine, select it.			

- 4. Click Next.
  - If you included **Nuance License** in the components you selected, the **Language Selection** screen opens. Skip the next step.
  - If you did not include Nuance License, the Nuance License screen opens.
- 5. In the **Nuance License** screen, enter the names of one or more Nuance license servers you want to use, as explained in the screen, and then click **Next**.

SpeechMiner 8.5 Setup	
Nuance License Please enter nuance license servers as a list of port@server combinations separated by semi-colon	9
	_
Nullsoft Install System v2.44       	Cancel

Nuance License screen

6. In the Language Selection screen, select the languages you want to install.

SpeechMiner 8.5 Setup	
Languages Selection Please select the languages you would like to install	0)
American English	
Brazilian Portuguese	
Canadian French	
Catalan	
Australian English	
🔲 UK English	
🗖 European French	
German	
🗖 Italian	
🔲 European Spanish	
🔲 Latin American Spanish	
Nullsoft Install System v2.44	
< Back Next >	Cancel

#### Language Selection screen

- 7. Click Next. The Choose Install Location screen opens.
- 8. Modify the default installation location if necessary, and then click **Install**. The installation process begins. When the process is completed select **Restart Now**, and then click **Finish**. A warning message appears.
- 9. In the warning message, click OK. The server restarts.

### See also

System Requirements

What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Configuring Permissions Configuring Internet Explorer

Home > Installing SpeechMiner > Configuring Permissions

## **Configuring Permissions**

This section describes the permissions that must be set for the functional SpeechMiner domain user (SMUSER) and for users of SMART.

### See also

For UPlatform (SMUSER) For UConnector For SMART For the Web Server

System Requirements What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Internet Explorer

Home > Installing SpeechMiner > Configuring Permissions > For UPlatform (SMUSER)

## For UPlatform (SMUSER)

SpeechMiner uses a a domain user account as the credentials for all the registered SpeechMiner services. Your IT department should be able to create this account for you. The domain user should be assigned permissions on all machines on which the UPlatform service will run, as described below. The user account should be created and assigned the required permissions before you begin configuring SpeechMiner.

Note: In this guide, ths functional user account will be called SMUSER.

### Groups

SMUSER should be added to the following groups:

- Power Users
- Performance Monitor Users (if this group exists on the machine)

### **Folder Properties**

In the Properties of the following folders, assign permissions to SMUSER as follows:

Note: Tab indicates the tab in the Properties dialog box in which the permission can be assigned.

Folder	Tab	Permission	Comments
Genesys installation folder	Security	Modify	Usually C:\Program Files (x86)\Genesys\Software
Genesys data folders	Security	Modify	E.g. C:\data - where the data\input and data\filtered folders are located
Genesys data folders	Sharing	Change	E.g. C:\data - where the data\input and data\filtered folders are located
C:\Program Files (x86)\Genesys\Software\utopy\product\WEB\App_Data	Security	Read/Write	This is for the impersonation user specified in the web.config file.

### **Report Server**

On the report server, assign the Content Manager role to SMUSER, as follows:

#### To assign the Content Manager role to SMUSER:

1. On the database server, open a browser, and navigate to //<database server name>/reports. The SQL Server Reporting Services manager opens.

Note: If the Windows UAC (User Account Control) is active on the server, open the browser by right-clicking it's icon and then selecting **Run as administrator**.

2 Home - Report Manager - Windows Internet Explorer		
🖓 🚱 🕫 😰 http://t.g.=tt2.http://t.gen/hider.lego.	💌 🔄 🗶 🖉	
(he fak yew figurates Jook yeb		
👷 Favortes 🔹 🏚 Sugarted Stars 🔹 🔊 web Star Galaxy •		
😂 • 🔛 Installing SQL Server on 646 🔛 SQL2008 Server Installation 🔛 Site Search - Yellow Fox 🖉 Plone - Report Hanager 🛛 🗶	💁 • 🔯 - 🖾 🖶 • Bage - Safety	
	Home   My Subscriptions   Site	Settings   Hel
SQL Server Reporting Services Home		
	Search	P
📸 New Folder 🗉 👷 New Data Source 🗉 🍇 Report Builder 🛛 🕍 Folder Settings 🔹 🕏 Upload File	<u>تا</u>	Details View
	Second intranet	· \$100%

SQL Server Reporting Services manager

2. Select the Folder Settings tab.

Note: If you cannot access this folder, because you are repeatedly asked for your credentials, and then the screen turns blank, do the following: In rsreportserver.config, remove the value **RSWindowsNegotiate** and ensure that **RSWindowsNTLM** is specified. (For more information about this problem, and some other solutions, see <a href="http://blogs.msdn.com/b/lukaszp/archive/2008/03/26/solving-the-reporting-services-login-issue-in-the-february-ctp-of-sql-server-2008.aspx">http://blogs.msdn.com/b/lukaszp/archive/2008/03/26/solving-the-reporting-services-login-issue-in-the-february-ctp-of-sql-server-2008.aspx</a>)

- 3. If SMUSER is not on the list, click **New Role Assignment** and add it. If it is on the list, click **Edit** to edit the existing account settings.
- 4. Select **speechminer database** > **sme**.
- 5. In the Security tab, click New Role Assignment. The New Role Assignment tab opens.
- 6. Under Group or user name, enter the user name (SMUSER).
- 7. Select the Content Manager checkbox.

SQL Server Reporting Services	
New Role Assignment	t
Use this page to define role-based security for Ho	ome.
Group or user name:	
Select one or more roles to assign to the group of	or user.
Role 4	Description
Browser	May view folders, reports and subscribe to reports.
Content Manager	May manage content in the Report Server. This includes folders, reports and resources.
My Reports	May publish reports and linked reports; manage folders, reports and resources in a users My Reports folde
Publisher	May publish reports and linked reports to the Report Server.
Report Builder	May view report definitions.
OK Cancel	

New Role Assignment tab

8. Click OK. The Content Manager role is assigned to SMUSER.

### **Directories Used by ASP.NET**

Give SMUSER access permissions to the IIS metabase and other directories used by ASP.NET. To do this, an administrator can run this command:

aspnet\_regiis.exe -ga "{domain}\{user}"

#### See also

For UConnector For SMART For the Web Server

Home > Installing SpeechMiner > Configuring Permissions > For UConnector

## For UConnector

A functional UConnector user should be assigned the permissions listed below. Note that you can use <u>SMUSER</u> for this purpose; it is not necessary to create a dedicated domain user for this.

Recording-system shared folder: Read permissions

• SpeechMiner input folder: Read/write permissions

#### See also

```
For UPlatform (SMUSER)
For SMART
For the Web Server
```

Home > Installing SpeechMiner > Configuring Permissions > For SMART

## For SMART

Any user who will run SMART should have the following permissions:

Folder	Permission	Comments
SpeechMiner installation folder	Read/write	Usually C:\Program Files (x86)\Genesys\Software
Package Root Path	Read/write	The path configured in the <b>Packages folders</b> text box in the <b>Sites and Machines</b> section.
Nuance installation folder	Read/write	E.g., C:\Program Files\Nuance

In addition, all SMART users should have permission to use .net encryption. To add this, an administrator can run the following command:

aspnet\_regiis -pa "NetFrameworkConfigurationKey" "{domain}\{user}"

### See also

For UPlatform (SMUSER) For UConnector For the Web Server

Home > Installing SpeechMiner > Configuring Permissions > For the Web Server

## For the Web Server

Once you have installed the SpeechMiner web server, you should set the following permissions:

- On the folder C:\Windows\Microsoft.NET\Framework\v2.0.50727\Temporary ASP.NET Files, give "Modify" permissions to the domain user that SpeechMiner will impersonate (SMUSER see For UPlatform, above).
- Set read/write/modify permissions to the IIS user/group (IUSR\_XXX in Windows XP or Network Service group in Windows Server 2003 and above) and the operational domain user (SMUSER) on the SpeechMiner installation folder.
- Set read/write/modify permissions to the IIS user/group (IUSR\_XXX in Windows XP or Network Service group in Windows Server 2003 and above) on the windows temp folder.

See also

For UPlatform (SMUSER) For UConnector For SMART Home > Installing SpeechMiner > Configuring Internet Explorer

## Configuring Internet Explorer

End users of SpeechMiner access its browser-based interface from Internet Explorer, which connects to the SpeechMiner Web server via the local network. In order for the SpeechMiner interface to work properly, you must configure each user's Internet Explorer as explained below. The configuration changes that must be implemented are to allow pop-ups from the SpeechMiner domain, to treat the SpeechMiner domain as part of the local intranet (or as a trusted site), and to enable automatic updating of cached of web pages. In addition, if Internet Explorer is running on a Windows Server 2008 machine, the Enhanced Security Configuration feature should be turned off.

**Note:** If the SpeechMiner domain is treated as part of the local intranet, **Local intranet** should appear in the Status Bar at the bottom of the Internet Explorer window whenever the browser is displaying a SpeechMiner page.

#### 🍕 Local intranet

"Local intranet" in Status Bar of Internet Explorer

#### To configure Internet Explorer:

1. In the Internet Options dialog box, in the Security tab, select Local Intranet.



Security tab with Local Intranet selected

- 2. Add the SpeechMiner domain to the list of web sites in the Local Intranet zone.
- 3. In the Privacy tab, add the SpeechMiner domain to the list of web sites that are permitted to open pop-ups.
- 4. In the General tab, under Browsing history, select Settings.
- 5. Under Check for newer versions of stored pages, select Automatically.

	es	
nternet Explorer sto for faster viewing late	res copies of webpage er.	es, images, and medi
Check for newer vers	sions of stored pages:	
C Every time I vi	sit the webpage	
C Every time I st	tart Internet Explorer	
Automatically		
C Never		
Disk space to use (8- (Recommended: 50		50 🛨
urrent location:		
: \Users\lschwartz\Ap nternet Files\	opData (Local (Microsof	t\Windows\Temporar
Move folder	View objects	View files
Hove toider		
story	ays Internet Explorer s e visited.	should save the list
story Specify how many da	e visited.	should save the list

"Check for newer versions of stored pages" set to "Automatically"

#### To turn off the Enhanced Security Configuration feature on Windows Server 2008:

1. In the **Server Manager**, in the home page (the top level), expand the **Security Information** section. The current settings for the Enhanced Security Configuration feature appear under IE Enhanced Security Configuration (ESC).

Security Information		🔐 Go to Windows Firewall
Windows Firewall:	Domain: Off	Configure Updates
Windows Updates:	Install updates automatically using a managed updating service	<ul> <li>★ Check for New Roles</li> <li>Bun Security Configuration Wizard</li> </ul>
Last checked for updates:	Today at 2:02 PM	🏀 Configure IE ESC
Last installed updates:	12/11/2013 2:00 PM	
IE Enhanced Security	Off for Administrators	
Configuration (ESC):	Off for Users	

Security Information section expanded

2. If the current settings are not Off for Administrators and Off for Users, click Configure IE ESC. The Internet Explorer Advanced Security Configuration dialog box opens.

interne	t Explorer Enhanced Security Configuration	
	t Explorer Enhanced Security Configuration (IE ESC) reduces the re of your server to potential attacks from Web-based content.	
	t Explorer Enhanced Security Configuration is enabled by for Administrators and Users groups.	
Adminis	trators:	
۲	O On (Recommended)	
۲	€ Off	
Users:		
۲	O On (Recommended)	
8	⊙ off	
More al	pout Internet Explorer Enhanced Security Configuration	
	OK Cancel	K

Internet Explorer Advanced Security Configuration dialog box

- 3. For both Administrators and Users, select Off.
- 4. Click OK.

#### See also

System Requirements What Is Installed Ports Used by System Components Before You Begin Installing the Components Installing the Components Installing the SpeechMiner Database Installing the SpeechMiner Web Installing the Interaction Receiver Installing the UPlatform Server Installing SMART Configuring Permissions Home > Configuring SpeechMiner

## Configuring SpeechMiner

This section explains how to configure SpeechMiner after it is installed. Most of the configuration is performed in the SMConfig application. This is a Windows application that can be installed on any machine on your network. Once it is installed, it can be used, from any machine on which it is installed, to configure the entire SpeechMiner system. (For information about installing SMConfig, see Installing the Components.)

#### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Licenses Services Audio Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Welcome Introduction Installing SpeechMiner

Home > Configuring SpeechMiner > Required Permissions

## **Required Permissions**

The user account from which SMConfig is opened must have read, write, and modify permissions on the local installation folder and files.

For most of the configuration changes you can perform using SMConfig, you will need Administrator privileges on the current machine or on other machines. For each configuration task described below, the required permissions are listed. If you are running SMConfig as a non-administrator user, and errors are generated during the configuration process, make sure that you have the right permissions for the task.

In Windows Vista and later versions of Windows, if **User Access Control** is enabled, SMConfig will automatically require you to run it with administrator privileges. If **User Access Control** is disabled, it is recommended to manually run SMConfig with administrator privileges. To do this, right-click the **SMConfig** icon, and then select **Run as administrator**.

### See also

Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Licenses Services Audio Index Setting the Date and Time

#### Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Encrypting the Connection to the Database

## Encrypting the Connection to the Database

The connection between SMConfig and the database can be encrypted to ensure that confidential data cannot be intercepted and viewed by unauthorized people. This option is configured by the system administrator on the SQL database server. Three encryption settings can be defined there:

- Always use encryption
- Never use encryption
- Use encryption when the user requests it

If the latter setting is implemented in your system, you can choose to use an encrypted connection when you log into SMConfig. If the database server is configured to always encrypt or not to encrypt at all, you cannot change this option when you log into SMConfig, and selecting one of the options has no affect.

### See also

Required Permissions Opening SMConfig Saving Changes Sites & Machines Reports Licenses Services Audio Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Opening SMConfig

## **Opening SMConfig**

SMConfig can be run on any machine in your system in which it is installed. During installation, an **SMConfig** icon is placed on the desktop of the machine.

You can log into SMConfig in one of the following ways:

- Using a SpeechMiner user account
- Using the Windows account you used to log onto the PC
- Using a Genesys user account and connecting to a Genesys configuration server for confirmation

#### To open SMConfig:

1. On the desktop of the computer, double-click the SMConfig icon. The SMConfig - Login dialog box appears.



SMConfig icon

SMConfig	- Login 🛛 🗙
SpeechM	liner Authentication
C Windows	Authentication
C Genesys	Authentication
Build:	7055
Username:	administrator
Password:	
DB Settings:	
	OK Cancel

SMConfig - Login dialog box

- 2. Select the type of user account you want to use to log into SpeechMiner:
  - SpeechMiner Authentication: Use a username and password that are managed by SpeechMiner.
  - Windows Authentication: Use the username and password you used to log into Windows.
  - Genesys Authentication: Use a Genesys username and password.

Note: If you are not sure which option to choose, consult your system administrator.

3. In the Username and Password fields, type your username and password.

**Note:** If you are logging in using Windows Authentication, your username and password are inserted autoamtically, and the username is in the form **domain\username**.

 If this is the first time you are opening SMConfig on this computer, or if you want to change the existing database settings, click the DB Settings arrow. The Login dialog box expands and displays the database settings.

Note: If you do not need to set or modify the database settings, skip this and the next step.

SpeechMiner Authentication     Windows Authentication     Genesys Authentication Build: 7055 Username: administrator Password: DB Settings:	DB Properties  SQL Server Authentication  Windows Authentication  Server: demo Port: 51606 Username: sa Password: Database: bby_install
	Encrypt connection

Expanded Login dialog box showing database settings

5. Fill in the fields as follows.

Field	Description
SQL Server Authentication	Select <b>SQL Server Authentication</b> if the username and password for accessing the database are managed on the SQL server. Select <b>Windows Authentication</b> if you log into the database using the same username and password you used to log into Windows.

Windows Authentication	Note: If you are not sure which option to choose, consult your system administrator.
Server	The name of the database server <b>Note:</b> If the database is a named instance on the server, enter both the server name and the instance name, in the format server_name\instance_name.
Port	The port to use to connect to the database server <b>Note:</b> This should normally be left as <default>, even if the database is a named instance.</default>
Username	The username to use to connect to the database <b>Note:</b> This field is not available when <b>Windows Authentication</b> is selected. In this case, the username is automatically taken from the username used to log into Windows.
Password	The password to use to connect to the database <b>Note:</b> This field is not available when <b>Windows Authentication</b> is selected. In this case, the password is automatically taken from the username used to log into Windows.
Database	The name of the database
Encrypt connection	If encrypting the connection to the database is optional in your system, select this option to activate encryption. <b>Note:</b> If encryption is always turned on in your system, selecting or clearing this option will have no effect. If encryption is always turned off in your system, selecting this option will prevent SMConfig from connecting to the database server and you will not be able to log in. In this case, an error message saying, "Could not connect to database. Please check database settings," will appear when you click <b>OK</b> .

6. If you have chosen to log in using Genesys authentication, an additional option, Configuration Server Settings, appears below DB Settings. If this is either the first time you are opening SMConfig on this computer, or you want to change the existing Genesys configuration server settings, click the Configuration Server Settings arrow. The Login dialog box expands and displays the configuration-server settings.

Note: If you do not need to set or modify the Genesys authentication settings, skip this and the next step.

/ <sup>JP</sup> SMConfig - Login	×
SpeechMiner Authentication     Windows Authentication     Genesys Authentication     Build: 7055 Username:	Configuration Server Properties
Password: DB Settings:  Configuration Server Settings:	
OK Cancel	

Expanded Login dialog box showing configuration-server settings

7. Enter the name of the server and the port to use to verify the user information, as follows.

Field	Description
Server	Enter the name of the configuration server.
Port	The port to use to connect to the configuration server in order to verify the user information

8. Click OK. You are logged into the system, and the SpeechMiner Configuration Tool (SMConfig) window opens with the first screen, Sites and Machines, displayed.

SpeechMiner Configura	tion Tool - 8.5	_ D ×
Sites & Machines	Sites & Machines	Filtered Dir: \\computer\data\filtered
	Validate input, filtered, store and installation folders	Cross site processing allowed  Prefer compressed remote audio
License	Machines & Tasks	
Ser <u>v</u> ices	Name Tasks	
Audio	Package Folders	Backup Folders
	Validate Report Server	Validate Package, Backup and Index Folders
	Report Server	Email
Index	Server Name: Guild Could	Email Server: mail.example.com
	Protocol: http:	Alerts Email: dummy@noplace.com
	Port: 80 Virtual Folder: Report Server	Index Folder: Default Language: American English
	Configuration Server	Select Languages
	Server Name:	
	Port: 2020	
		Save

Sites and Machines screen of the SMConfig window

The SMConfig interface contains panels (Sites and Machines, Reports, etc.) in which various categories of configuration settings can be accessed.

#### To open a panel:

• On the left side of the window, select the icon of the panel. The panel opens on the right side of the window.

### See also

Required Permissions Encrypting the Connection to the Database Saving Changes Sites & Machines Reports Licenses Services Audio Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes Home > Configuring SpeechMiner > Saving Changes

## Saving Changes

Changes you make in one panel of SMConfig are saved temporarily if you open a different panel. Nonetheless, you must click **Save** in each panel to save the settings in that panel.

After you click **Save**, before the settings are actually saved, some settings go through a validation process. Validation ensures that the locations specified for folders and files exist and can be accessed, and checks that certain important parameters are configured properly. Certain key settings are always validated when **Save** is selected; you can choose to have the system validate certain others if you wish.

During the validation process, a **Progress** window is displayed. The window lists the stages of the validation process as they are completed, with an icon indicating the status of each stage.

Icon	Description
$\checkmark$	Success: Validation of the stage was successful.
	Warning: Validation of the stage was successful, but some problematic issues were detected.
8	Failure: Validation of the stage failed, because of the problems indicated. No changes to the configuration were saved.

When the process is complete, the **Close** button at the bottom of the window becomes active. If validation was successful, the last line of the log says  $\checkmark$  **Done**. If the Progress window contains any stages that failed (indicated by <sup>SO</sup>), the entire save process is cancelled.

rogress		
Messages		
✓ validating site 1 (Detroit)		
√ Done.		
		-
		Ŧ
	Glose	

Validation process completed successfully

Messages	
√ validating site 1 (Detroit)	
Tailed to access the report server	Invalid URI: The hostname could not be parsed.
🔥 The new package folder "\\ibbyin	st\c\$\data\grammars\' could not be found. It was added to the system .
Notify web on machine \\LIBBYIN	IST failed. If this is the first time the system is being configured please ig.
✓ Done.	

Validation process completed successfully, with warnings

Progress	
Messages	
√ validating site 1 (Detroit)	
√ validating site 2 (Vancouver)	
Siltered folder is missing for site Vancouver	
There should be at least one store folder for site Vancouver	
Computer list is empty for site Vancouver	
A Failed to access the report server Invalid URI: The hostname could not be parsed	L.
	A
	<b>T</b>
Qlose	
	11

Validation process failed

#### To see details about a warning or failure:

• In the **Progress** window, select the item. Details are displayed at the bottom of the window.

🗸 validating site 1 (New York)		
	iled. If this is the first time the system is being configured pleas	se ig.
V Done.		
letify was as machine \\1 IDDVINICT failed	If this is the first time the surters is being performed places.	
nore this warning.	If this is the first time the system is being configured please	
nore this warning.	If this is the first time the system is being configured please speechminer/webServices/notification.asmx	-
nore this warning.		-

Details displayed for the selected item

After the configuration changes are successfully saved, a Restart Services message appears.

Restart Services	×
The changes you have made will not take effect until the UPlatform services are restarted.	
To choose which services to restart, or to start new services, go to the Services panel.	
Would you like to automatically restart all running services?	
Yes No	

Select Yes to restart all of the services, or No if you prefer to restart them later (either after you make additional configuration changes, or manually from the <u>Services panel.</u>)

#### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Sites & Machines Reports Licenses

**Restart Services message** 

Services Audio Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Sites & Machines

## Sites & Machines

The first panel of the SMConfig application, **Sites and Machines**, is used to configure the layout of the system as well as some other system-wide parameters.

SpeechMiner Confi Detroit Va	incouver		- 🗆 ×
	Site Site Machines	Filtered Dir: \\r/QAStore\libby8_0\data	
Reports			
Services	Name Tasks	Caching(1) Exploration(1) Index(1) ActiveSearch(	
ééé Audio	Package Folders	Backup Folders	
Index	Validate Report Server Report Server Server Name: demo3 Protocol: http: 💌	Validate Package, Backup and Index Folders      Email     Email Server: demo1     Alerts Email: demo@demo.com	
	Port: 80 Virtual Folder: ReportServer Configuration Server Server Name: genconf	Index Folder: \\ii.:\QAStore\libby8_0\index Default Language: American English Select Languages	]
	Port 2020		<u>S</u> ave

Sites and Machines screen

### See also

Configuring Sites Configuring Machines and Tasks Remote Index Search Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Reports Licenses Services Audio Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Sites & Machines > Configuring Sites

## Configuring Sites

A site is a single geographical location in which SpeechMiner servers are located. One SpeechMiner system, which has one database, can have a number of sites. All the sites configured in the **Site** section of the **Sites and Machines** panel are locations that connect to the SpeechMiner database you entered when you logged into SMConfig. If your SpeechMiner is set up in more than one location, configuring each location as a site helps to minimize the bandwidth needed for call processing.

Every SpeechMiner system has at least one site. The first site is created automatically, and is initially called "default." Immediately after SpeechMiner is installed, the "default" site is automatically configured to include all the servers in the local network on which SpeechMiner components were installed. You can change the name of the default site, and add sites, as required. If you create new sites, you can move servers that are listed under the default site to other sites.

### **Required Permissions**

Validation of the input, filtered, store, and installation folders can only be performed if the user account used to log into SMConfig has administrator permissions on the machine that is being configured. This is because SMConfig must use the \$ share to check that the installation folder exists.

### Configuring the Default Site

Some of the settings in the **Sites and Machines** panel are configured per site, and others are configured for the entire system. This section explains how to configure the default site by configuring the site and system settings defined in the **Sites and Machines** panel.

After you configure the settings, and click **Save** to save them, SMConfig automatically validates the key folders you specified by checking that they exist and are configured with the required permissions. Validation is always performed on the items listed under **Machines and Tasks**. Validation of other settings is optional, as indicated below. For additional information, see <u>Saving Changes</u>.

#### To configure the default site:

1. In the Sites and Machines panel, fill in the fields as follows:

Field	Description			
Site Name	The name of the site. Initially, the site is called "default." Modify this field to change the name.			
Filtered Dir	Enter the location of the folder called filtered that you created (see <u>Creating the Required Folders</u> ). For example, the required path format is \\computer\data\input.			
Input Folders	Click to add a line to the list. Then, modify the line to give the location of the input folder you created (see <u>Creating the Required Folders</u> ).			
	If you will be using multiple input folders for this site, repeat this procedure to add additional lines to the list, as necessary. For example, the required path format is \\computer\data\input.			
Store Folders	Click of to add a line to the list. Then, modify the line to give the location of the store folder you created (see <u>Creating the Required Folders</u> ).			

	If you will be using multiple store folders for this site, repeat this procedure to add additional lines to the list, as necessary.
Validate input, filtered, store, and installation folders	Select this option if you want SMConfig to validate the input, filtered, store, and installation folders after you click <b>Save</b> (see <u>Saving Changes</u> ).
Cross site processing allowed	If your system will have more than one site, select this option to enable processing of interactions from other sites at this site. When this option is selected, the Recognizers at this site will give priority to processing local files, but no local files need to be processed, they will process calls from remote locations. Selecting this option can improve the overall performance of the system, but it does mean that audio files will be transmitted over the network.
Prefer compressed remote audio	If cross-site processing is activated, select this option to give priority to compressed audio files if they are available. If this option is selected, when call data is transmitted from a remote site to this site for processing, the system will send the compressed versions of calls if they are available. In this case, the compressed audio will be decompressed before being processed by the Recognizer. Even so, the quality of the audio input may be diminished slightly, and this may impact the recognition quality.
	Note: This option is only available when Cross site processing allowed is selected.
Machines and Tasks	List all the SpeechMiner machines at the site, and configure the tasks that will run on each machine, as explained under <u>Configuring Machines and Tasks</u> .
Package Folders	Click log to add a line to the list. Then, modify the line to give the location of the grammars folder you created (see <u>Creating the Required Folders</u> ).
	If you will be using multiple grammars folders in your system, repeat this procedure to add additional lines to the list, as necessary. For example, the required path format is \\computer\data\input.
Backup Folders	Click log to add a line to the list. Then, modify the line to give the location of the backup folder you created (see <u>Creating the Required Folders</u> ).
	If you will be using multiple backup folders in your system, repeat this procedure to add additional lines to the list, as necessary. For example, the required path format is \\computer\data\input.
Validate Report	Select this option if you are configuring SpeechMiner to use a report server (whose details are given below this option). SMConfig will check that the parameters are correct.
Server	<b>Note:</b> If you select this option, SMConfig will try to validate that the user who is running SMConfig has access to the report web service and can call methods using this web service. Therefore the user account that was used to run SMConfig must have the Content Manager role on the report server (see For UPlatform (SMUSER).
Validate Package, Backup, and Index Folders	Select this option if you want SMConfig to check whether the Package, Backup, and Index folders exist and are configured properly.
Report Server	Fill in the fields in this area as follows:
	<ul> <li>Server Name: The name of the machine on which the report server is installed</li> <li>Protocol: The protocol SpeechMiner should use to connect to the report server</li> <li>Port: The port SpeechMiner should use to connect to the report server</li> </ul>
	<ul> <li>Virtual Directory: The folder of the reports on the report server - usually named ReportServer If the database is a named instance, enter both the folder name and the instance name, in the format ReportServer_<instance_name>.</instance_name></li> </ul>
	Note: If you plan to use the report server, select Validate Report Server (see <u>above</u> ).
Email	Fill in the fields in this area as follows:
	<ul> <li>Email Server: The name of the email server SpeechMiner should use to send alerts, notifications, and reports</li> <li>Alerts Email: The email address SpeechMiner should use as the sender address when it sends email notifications</li> </ul>

Click to add a line to the list. Then, modify the line to give the location of the index folder you created (see <u>Creating the Required Folders</u> ). If you will be using multiple index folders in your system, repeat this procedure to add additional lines to the list, as necessary. For example, the required path format is \\computer\data\input.
Select the default language for new Programs that are opened in SMART. (If additional languages are installed in SpeechMiner, the languages of individual Programs can be changed in SMART when the Programs are created.)
Note: Only the languages selected under Select Languages appear in the dropdown list.
Select all of the languages for which you will want to perform speech recognition. These languages will appear as language options in SpeechMiner and in SMART.
<b>Note:</b> In order to create and apply Programs in these languages, their language packs must also be installed. The language packs are installed as part of the SpeechMiner installation process (see <u>Running the Setup Program</u> and <u>Installing SMART</u> ).
<b>Note:</b> The langauge selections here do not affect the language of the web-based interface. The interface language is selected in the settings of the Web server, under <u>Machines and Tasks</u> .
If users will use Genesys credentials to log into any of the SpeechMiner components from this site, fill in the fields in this area as follows:
<ul> <li>Server Name: The name of the machine on which the Genesys configuration server is installed</li> <li>Port: The port SpeechMiner should use to connect to the configuration server</li> </ul>

2. Click **Save**. The system <u>validates</u> the settings, and then, if the validation is successful, implements them. The <u>Progress</u> <u>window</u> opens and shows information about the implementation process.

### Adding a Site

1.1

...

If your system will have servers at more than one site, you can add additional sites to the configuration in SMConfig. A new tab is added to the **Sites and Machines** panel for each site you create. The settings in the upper half of the panel, under **Sites** and **Machines and Tasks** are configured per site. The settings in the lower half of the panel are configured per system, and thus are not changed when you add an additional site.

Before you begin adding the site, create filtered, input, and store folders on a machine at the new site (see <u>Creating the</u> Required Folders).

#### To add a site:

- 1. In the upper-left of the Sites and Machines panel, select Select Level tables. A New tab is added to the site-setting area in the upper part of the panel.
- 2. Under Site Name, modify the name as required. The name of the tab is automatically updated.

	S & Machines          New York       San Diego         Site       Site         Site Name:       San Diego         Input Folders       Input Folders		Filtered Dir:	
	Validate input, filtere	ed, store and installation folders	Cross site processing allowed     Prefer compressed remote audio	
9	Machines & Tasks —			
	Name	Tasks		
	×			

New site added

3. Under Sites and Machines and Tasks, fill in the fields for the new site, as explained above.

#### See also

Configuring Machines and Tasks Remote Index Search

Home > Configuring SpeechMiner > Sites & Machines > Configuring Machines and Tasks

## Configuring Machines and Tasks

The Sites and Machines panel should list all the machines used by SpeechMiner at each site, and the tasks they will run. Before you begin configuring the settings in this panel, map out the machines in your system, their specifications, the sites at which they are located, and the tasks that must be performed at each site. Using this information, you can decide which tasks to run on each machine.

### Choosing Which Tasks to Run on Each Machine

Before you can configure the machines and their tasks, you must decide which tasks to assign to each machine. Each machine can have a number of different roles at one site. The entire system must include machines that fill all of the following roles:

- Web server: Runs the SpeechMiner web-based interface
- Interaction Receiver: Used for the Recording UI and Recording+Analytics modes. It receives interaction data and metadata from the Genesys Interaction Recording system, inserts it into the SpeechMiner database, and places the data files in the Store folder to await processing
- Fetcher: Takes unprocessed interaction data and metadata from the input folder (where the UConnector placed it after retrieving it from the recording system), inserts it into the SpeechMiner database, prepares the data files for processing by SpeechMiner, and places it in the store folder to await processing
- Call Recognizer: Processes call audio according to the requirements of the Program to which the call belongs, by transcribing the text and identifying Topics and other events in it
- Indexer: Maintains an index of calls, metadata, and events, so it can be searched quickly
- Report caching: Runs reports that are included in active users' Views pages overnight so that they can be displayed quickly in their widgets when the users open their Views pages; the amount of time to store cached results is configured in the <u>Reports</u>

#### panel.

- Active Search Manager: Enables the Active Search feature to work in the web-based interface
- Exploration: Performs the data analysis required for the Exploration feature of the web-based interface
- Recategorizer: Assigns Categories to the processed interactions in accordance with the Category definitions defined in the system
- Text Recognizer: Processes written interaction input data and identifies Topics and other events in it

Normally, each site will have:

- One Web server
- One or more fetchers
- Several Recognizers, Recategorizers, Active Search Managers, and Monitors
- One or more Indexer tasks (The Indexer tasks should only be configured on machines that are located on the same local network as the index folder.)

Note: Monitors run on all computers in the system. Because of this, there is no option to assign the Monitor task to specific machines, and it does not appear in the list of roles above.

Note: It is recommended to run the Recategorizers and the Active Search Managers on the same machines as the Recognizers.

#### **Optimizing the Number of Fetchers**

In order to optimize the rate at which interaction data is fetched, multiple fetchers can run simultaneously. You can configure SpeechMiner to employ multiple fetchers on one or more machines. However, if too many fetchers run on a single machine simultaneously, the CPU may not be able to run all of its tasks efficiently. The optimal number of fetchers to run on a single machine is a function of how powerful the CPU of the machine is. As a rule of thumb, you can assume that 0.5 fetcher tasks per core on each fetcher machine is ideal. Thus, normally, two fetchers will maximize the CPU usage on a quad-core machine.

#### Optimizing the Number of Call Recognizers

In order to maximize the speed of interaction processing, multiple Call Recognizers can run simultaneously. You can configure SpeechMiner to employ multiple Call Recognizers on one or more machines. However, if too many Call Recognizers run on a single machine simultaneously, the CPU may not be able to run all of its tasks efficiently. The optimal number of Call Recognizers to run on a single machine is a function of how powerful the CPU of the machine is and how many Topics must be recognized concurrently. As a rule of thumb, you can assume that 1.5 Call Recognizers per core on each Recognition server is ideal. Thus, normally, six Call Recognizers will maximize the CPU usage on a quad-core machine.

The Call Recognizers in your system are run by a special Recognition process (uRecognizer.exe) that is distinct from the Platform process (uPlatform.exe). Each Recognition process can manage multiple Call Recognizers. You can configure the maximum number of Call Recognizers that should be managed by each Recognition process. If the number is too low, performance may be impacted; if it is too high, the process may run out of memory. Running more than six Call Recognizers per process is not recommended. Unless you are running the processes on a virtual machine(VM), it is recommended to configure the system to run at most six Call Recognizers per process. Then, if you encounter memory problems, reduce this number as necesary to eliminate the problems. On a virtual machine, it is highly recommended to run only two Call Recognizers per process. If you run more than two Call Recognizers simultaneously on a VM, they slow one another down considerably. This recommendation is relevant for virtual machines running either on VMware or Hyper-V servers.

#### Configuring the Properties of a Machine

You configure the properties of a machine by selecting the tasks it should perform.

#### To configure the properties of a machine:

1. Under Machines & Tasks, double-click the machine. A Properties window opens and displays the properties of the machine..

/ <sup>9</sup> Properties		×	
Name:	LIBBY		
Installation Folder:	E:\Genesys\software		
🔽 Web Server			
Protocol:	http:		
Port:	80		
Virtual Folder:	speechminer		
Language:	English 💌		
📕 Search u	sing remote web service		
Compute	r. 🔽		
Interaction Rec	eiver Parameters		
🔽 Fetcher	2 🕂 Parameters		
🔽 Call Recognize	r 6 📑 Parameters		
✓ Indexer			
Report Caching			
<ul> <li>Active Search Manager</li> <li>Exploration</li> </ul>			
Recategorizer			
Text Recognize	er		
OK Cancel			

Properties of selected machine

- 2. Select all of the tasks the machine should perform.
- 3. If you selected **Web Server**, select the protocol, specify the port and virtual folder, and select the langauge of the web-based interface.

In addition, if the index folder used by the system is on a different network, select **Search using remote web service**, and then, under **Computer**, select the machine that the index folder is stored on. For additional information about this option, see <u>Remote Index Search</u> below.

- 4. If you selected Interaction Receiver, click the Parameters button to its right. In the dialog box, enter the location of the Interaction Receiver Input folder in which the audio files received from the Genesys Interaction Recording solution will be placed , and then click **OK**. Note that the Interaction Receiver Input folder is not the same folder as the Input folder used by the fetchers.
- 5. If you selected **Fetcher**, configure the **Fetcher** settings as explained <u>below</u>.
- 6. If you selected Call Recognizer, configure the Call Recognizer settings as explained below.
- 7. Click **CK**. The machine is added to the list of machines at the site.

#### To configure the settings of the fetchers:

- 1. To the right of the Fetcher checkbox, select the number of fetchers that should run on the machine.
- 2. Click the **Parameters** button. The **Fetcher Parameters** window opens and displays a list of all the input folders that are configured for the site.



- 3. Under **Number of Fetchers**, specify how many fetchers should retrieve interaction data from each input folder. Modify the values so that the sum of all the fetchers defined matches the number of fetchers that you specified should run on the machine.
- 4. Click OK.

#### To configure the settings of the Call Recognizers:

- 1. To the right of the Fetcher checkbox, select the number of Call Recognizers that should run on the machine.
- 2. Click the **Parameters** button. The **Recognizer Parameters** window opens and displays a list of all the input folders that are configured for the site.

/ <sup>10</sup> Recognizer Parameters	×
Maximum number of recognizers per process	6 🗧
Server port range start	2001 🛨
Limit number of Active Search recognizers	
OK Cancel	

#### **Recognizer parameters**

3. Fill in the fields as follows:

Field	Description
Maximum number of recognizers per process	How many Call Recognizers can be handled by each process
Server port range start	The ports that will be used by the Call Recognizers; the system will use multiple ports, as necessary, begining with the port entered in this field. By default, this is port 2001. You can change this number if it conflicts with other port settings in your system.
Limit number of Active Search recognizers	Active Search is a feature that users can access from the SpeechMiner web-based interface. It allows users to reprocess calls in order to search for new terms that were not sought in the original processing. Active Search uses the same Call Recognizers that are used for the original processing of calls. If Active Search is running at the same time as routine call processing, it may slow the routine processing down considerably by using its Call Recognizers.
	If Active Search is frequently run during the time when routine call processing is performed, you may wish to limit the number of Call Recognizers that can be used by Active Search at any given time. To do so, enter the maximum number of Call Recognizers that Active Search can use at one time.

### Adding Machines to a Site

You can add machines to sites as required.

To add a machine to a site:

- 1. Under Machines & Tasks, click 2. A blank Properties window opens.
- 2. Fill in the name and properties of the machine, as explained above.
- 3. Click OK. The machine is added to the list of machines at the site.

### See also

Configuring Sites Remote Index Search

Home > Configuring SpeechMiner > Sites & Machines > Remote Index Search

## Remote Index Search

The index is a collection of system files. When SpeechMiner searches for calls in the index, it reads the index files from the hard drive on which they are stored. These index files can be on the hard drive of the machine performing the search (the Web server), on a different machine on the same LAN, or on a different machine on a remote LAN.

Whenever the index folder is on a different machine from the Web server performing the search, Windows sharing is used to enable the Web server to access the index files. If both machines are on the same LAN, this arrangement should not cause any performance issues. But when the Web machine and the index machine are on different sites that connect to one another over the internet, accessing the system files on the index machine directly, via Windows sharing, can be slow, especially if the index files are large.

To solve this issue, each Web machine can be configured to either search the index files directly or to use Web service calls.

Consider, for example, a SpeechMiner system that has two sites: Both sites have Web servers, and the second site also stores the index files. In this system, we configure the Web server at Site 2 to search the index files directly, because the index files are located on the same machine as the Web server. On the other hand, we configure the Web server at Site 1 to search the index using Web service calls to the Web server at Site 2. This arrangement is illustrated in the diagram below:



This configuration is set up in the **Properties** windows of each of the machines in the system.

/ Properties		×	
Name:	LIBBY		
Installation Folder:	E:\Genesys\software		
🔽 Web Server			
Protocol:	http:		
Port:	80		
Virtual Folder:	speechminer		
Language:	English		
📕 Search u	sing remote web service		
Compute			
Interaction Rec	eiver Parameters		
Fetcher	2 🕂 Parameters		
🔽 Call Recognize	r 6 🔹 Parameters		
🔽 Indexer			
🔽 Report Caching			
🔽 Active Search Manager			
✓ Exploration			
Recategorizer			
🔽 Text Recognize	er		
	DK Cancel	//	

**Properties window** 

#### To configure a Web server to search the system files directly:

In the Properties window of the Web server, clear the Search using remote web service checkbox.

To configure a Web server to search the system files by calling the Web service on another machine:

- 1. In the **Properties** window of the Web server, select the **Search using remote web service** checkbox. The **Computer** field becomes active.
- 2. In the Computer field, select the Web server to which search requests should be sent.

### See also

Configuring Sites Configuring Machines and Tasks

Home > Configuring SpeechMiner > Reports

## Reports

If you want to use any of the SpeechMiner reports, you must deploy both the MRS Library, which is a DLL that provides support for various report features, and all the required reports, on the report server. You can do this from the **Reports** panel of SMConfig. The DLL and the reports will be deployed on the machine that is identified in the <u>Sites and Machines</u> panel, in the list of <u>Machines and</u> <u>Tasks</u>, as the report server.



**Reports panel** 

### **Required Permissions**

In order to check if the MRS Library is already deployed on the report server, and in order to deploy it, SMConfig has to find the location of the report server's bin folder and then access the folder using the \$ share. To do this, it must read the report server's Registry. Therefore, to deploy the MRS Library and any or all of the reports, the user account used to log into SMConfig must have administrator permissions on the report server.

### **Deploying the Reports**

In order to deploy reports on the report server, you must deploy the MRS Library on the server, and then deploy the required report templates. You can perform both actions simultaneously by selecting both options in the **Reports** panel. Once the MRS Library is deployed on the server, you can deploy additional reports there without redeploying the library.

Note: When you select the Reports panel, SMConfig checks whether the MRS Library is already deployed on the machine.

#### To deploy reports on the report server:

1. In the **Reports** panel, fill in the fields as follows:

Field	Description	
Set reports	If you chose to use <u>report caching</u> in the <u>Sites and Machines</u> panel, specify how long report results	

caching time	should be cached, in minutes. The results of reports that are included in active users' <b>Views</b> pages will be saved for the specified period of time. Users who open their <b>Views</b> pages during that time period will see the cached results. The recommended time period is 24 hours (i.e., 24*60=1440 minutes), because the report caching runs once every 24 hours.
Deploy MRSLibrary	If the MRS Library has not yet been deployed on the report server, select this option. <b>Note:</b> If this option is not selected, but the checkboxes in the <b>Report/Resource</b> list below are active, this means that the MRS Library is already deployed on the machine. In this case, it is not necessary to select this option.
Deploy reports	Enter the location of the <b>reports</b> folder. This folder is called reports, and is located in the SpeechMiner installation folder. For example, if SpeechMiner was installed in c:\Program Files (x86)\Genesys\Software, the path to enter would be c:\Program Files (x86)\Genesys\Software\reports.
Select\Unselect All	Select the checkbox to select all of the reports in the <b>Report/Resource</b> list below for installation. Clear it to clear all of the selections in the list. <b>Note:</b> If this option is not available, this means that the MRS Library has not yet been deployed on the machine. In this case, select Deploy MRSLibrary, and this option will become available.
Report/Resource	Select the reports you want to deploy on the report server <b>Note:</b> If this option is not available, this means that the MRS Library has not yet been deployed on the machine. In this case, select Deploy MRSLibrary, and this option will become available.

2. Click **Save**. The system begins to deploy the reports on the report server, and the <u>Progress window</u> opens and shows information about the deployment process.

### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Licenses Services Audio Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Licenses

## Licenses

In order for the system to process calls, the licenses you received from Genesys must be entered in the Licenses panel. The licenses are not included in the SpeechMiner installation folder.



SMConfig Licenses panel

#### To update the licenses:

- 1. Copy the SpeechMiner license that was supplied.
- 2. In SMConfig, in the Licenses panel, paste the license into the SpeechMiner License field.
- 3. Copy the Nuance license that was supplied.
- 4. In SMConfig, in the Licenses panel, paste the license into the Nuance License field.
- 5. Click Save.

**Note:** If the license texts are stored in separate files, as an alternative to the procedure described above, you can browse to locate the files. When you open the relevant file, its contents are automatically copied into the appropriate field.

#### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Services Audio Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Services

## Services

The Services panel is used to manage the SpeechMiner services. You can use it to:

- Register all the SpeechMiner services on each machine in the system
- Update the SpeechMiner configuration files on each machine
- Start, restart, and stop services

You must perform these actions at the end of the installation process, and also whenever you add, change, or remove services or machines to or from the system. You can also use the **Services** panel to restart or stop services whenever necessary.

SpeechMiner Configuration Tool - 8.5	_0	×
Services	Select/Deselect All	
Create Performance Counters	Machine	
Sites & Machines Register services		
Update config files		
Encrypt config files		
Enorts		
Credentials Username		
Password		
Domain		
License		
Restart Services and leave status as is	<b>x</b>	
C Stop Services		
Services		
Update Nuance license server		
Audio		
Index		
	Save	1

Services panel

See also

Initial Configuration Required Permissions Starting and Stopping the System

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Licenses Audio Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Services > Initial Configuration

## **Initial Configuration**

After you install SpeechMiner and configure its components in SMConfig, you must register all of the SpeechMiner services, update the SpeechMiner configuration files on each machine, and start all Uplatform servers. In addition, whenever you make changes to the system, you should follow the same procedures, as explained below.

#### To configure the services in your system:

1. In the Services panel, fill in the fields as follows:

Field	Description		
Create performance counters	Select this option to configure the performance counters on each of the selected machines. <b>Note:</b> Performance counters should normally be configured only once for each machine. Select this option for all machines when you first install SpeechMiner. Then, if you add new machines to the system, select this option for the new machines.		
Register       Select this option to register the relevant services on each of the selected machines.         Services       When you select this option, the Credentials area becomes active. Enter the credentials of the user that will run the services (typically, SMUSER).         Note:       Service registration should be performed once for each machine when SpeechMiner is installed. It should be performed again if the credentials of the Windows user account running			
	<ul> <li>services are changed. Select this option for all machines when you first install SpeechMiner. Then, if you add new machines to the system, select this option for the new machines.</li> <li>Note: If the credentials given are for a local user on each machine rather than a domain user, under Domain, enter a "." (dot). The Uplatform service will be registered but the user will not have the "Run as Service" role. You will have to manually go to the Windows services management tool on each machine, enter the password, and click Apply.</li> </ul>		
Update config files	Select this option to update the SpeechMiner configuration files on each of the selected machines.         When you select this option, the Credentials area becomes active. Enter the Windows user that will run the services(typically, <u>SMUSER</u> ). In addition, the encryption options become active. Select the required options.         Note:       Updating of configuration files should be performed once for each machine when SpeechMiner is first installed. It should be performed again if the credentials of the Windows user account running the services are changed. Select this option for all machines when you first install SpeechMiner. Then, if you add new machines to the system, select this option for the new machines.		
Restart Services /	All the Uplatform services must be restarted after the installation and configuration processes are completed. To do this, under <b>Restart Services and</b> , select <b>change status to run</b> . Then, under <b>Machine</b> , make sure all servers on which Uplatform is installed are selected.		
Stop Services	<b>Note:</b> The restart and stop options in this panel should also be used whenever you need to restart or stop any of the SpeechMiner servers (see <u>Starting and Stopping the System</u> ).		

Update Nuance license server	If your Nuance license servers are installed on central machines, enter the list of servers and ports in this box. This will update the selected machines' environment variables so that they point to these license servers. Separate entries with semi-colons (;).
	If you want SMART to access a central license server, add this environment variable to the list: SWILicenseServerList=port@server
	<b>Note:</b> Select this option for all machines when you first install SpeechMiner. Then, if you relocate the license server to a different machine, add additional servers, or remove existing ones, run this option and select all the machines in your system.
	<b>Note:</b> If you are updating the Nuance license servers on remote machines, the Remote Registry service must be running on those machines. If it is not running on one of the machines, the error "Failed to update Nuance license on [MACHINE NAME]. The network path was not found." will appear in the <b>Progress window</b> .
Select/Deselect all	Select the checkbox to select all of the machines in the list below for updating. Clear it to clear all of the selections in the list.
Machine	Select the machines for which you want to implement the options you selected on the left side of the panel.

2. Click **Save**. The system begins to implement the settings you selected, and the <u>Progress window</u> opens and shows information about the implementation process.

Note: For information about required permissions, see below.

### See also

Required Permissions Starting and Stopping the System

Home > Configuring SpeechMiner > Services > Required Permissions

## **Required Permissions**

The user account used to log into SMConfig must have the required permissions in order for SMConfig to perform the actions selected in the **Services** panel. Some of the requirements are for permissions on the local machine (the machine on which SMConfig is currently running); others are for permissions on the selected remote machines. The various options in the panel have different permission requirements, as explained below:

Option	Required Permissions	Additional Details
Create Performance Counters	For remote machines: Administrator privileges on the selected machines	
	<ul> <li>For the local machine: Under Windows Server 2008, Power User privileges.</li> </ul>	
Register Services	Administrator privileges on the selected machines	Administrator privileges on the selected machines are required in order to register the Uplatform service. These privileges are required for running remote commands on the selected machines and for registering the services using the Windows Services API
Update Config Files	Administrator privileges on the local machine and on all selected machines	Administrator privileges on the selected machines are required in order to update the configuration files on the local machine and on the remote machines. These privileges are required for accessing the files using the \$ share and for encryption and decryption (if <b>Encrypt config files</b> is selected).

Restart/Stop Services	For remote machines: Administrator privileges on the selected machines For the local machine: Power User privileges	<ul> <li>To change the Uplatform service status on remote machines, Administrator permissions are required in order to get the service information and change it's status remotely using the Windows Services API.</li> <li>To change the Uplatform service status on the local machine Power User privileges on the local machine are sufficient.</li> </ul>	
Update Nuance license server	For remote machines: Administrator privileges on the selected machines	Administrator permissions are required in order to update the registry key that controls the Nuance environment variables.	
	For the local machine: Under Windows Server 2008, Power User privileges.		

### See also

Initial Configuration Starting and Stopping the System

Home > Configuring SpeechMiner > Services > Starting and Stopping the System

## Starting and Stopping the System (Bootstrap)

You can start, restart, or stop SpeechMiner services in SMConfig in the **Services** panel. One case in which you must use this feature to start the Uplatform services is after the initial installation and configurion of the system (see <u>Initial Configuration</u>). You can also use these features to change the status of a service from run to idle, or vice versa, or to completely stop a service.

Note: You can also toggle between "idle" status and "run" in the SpeechMiner web interface, in the System Monitor page.

#### To start, restart, or stop SpeechMiner services:

- 1. In the Services panel, clear the Create Performance Counters, Register Services, and Update Config Files checkboxes.
- 2. Select one of the following options:
  - 1. Restart Services and leave status as is: Restarts the selected services, and leaves them in the mode they were in previously
  - 2. Restart Services and change status to run: Restarts the selected services, and puts them into "run" mode
  - 3. Restart Services and change status to idle: Restarts the selected services, and puts them into "idle" mode

Restarts the selected services, and puts them into "idle" mode

4. Stop Services: Stops the selected services

Stops the selected services

- 3. In the list of machines, select the servers you want to restart or stop.
- 4. Click **Save**. The system begins to implement the options you selected, and the <u>Progress window</u> opens and shows information about the implementation process.

#### See also

Initial Configuration Required Permissions Home > Configuring SpeechMiner > Audio

## Audio

The **Audio** panel of SMConfig is used to configure the call-audio recognition and playback formats, retention periods for each format and site, and playback rates. Below the settings is a summary of the audio formats that are supported for each audio function.

SpeechMiner Configuration	ation Tool - 8.5		-0	×
Sites & Machines	Audio Recognition Audio Format Select the audio format for recognition: WAV_PCM	Playback Audio Format Create compressed audio file If compress format not avail Play recognition file C Convert the recognition		
License License Services Audio Lindex	Retention Policies         Site       Format         default       WAV_P         default       WAV_G         default       WAV_MAV_G         default       WAV_MAV_MAV_MAV_MAV_MAV_MAV_MAV_MAV_MAV_M	SM610 120	Playback Speeds         Image: Alternative state st	
			Save	

Audio panel

### Configuring the Audio Settings

The Audio panel contains the basic audio setting options for the system.

**Note:** This panel includes the most common audio configurations. If you require a more complex configuration, you must manually define it in the database. Bear in mind that, if you do so, the configuration you defined in the database will not appear in the **Audio** panel. In this case, be careful not to click **Save** in this panel. If you do, the settings in the panel will overwrite the more complex configuration you defined in the database.

To configure call-audio settings:

- 1. In the Audio panel, fill in the fields as follows:

\_\_\_\_

Field	Description
Select the audio format for recognition	Select the format of the call audio that should be used by SpeechMiner during the recognition process. If the audio received from the recording system is not in the format selected here, the fetchers will automatically convert it to this format (after they retrieve it from the input folders) before they save it in the store folders to await processing by SpeechMiner. If the system is used in the Recording UI mode or Recording and Analytics mode, the format should be set to WAV_PCM.
Create compressed audio file	Select the format of the call audio should that should be used by SpeechMiner for playback in the web-based interface. After the audio of a call is processed, an additional compressed copy is made in this format and saved in a file in the store folders.
	If the system is used in the Recording UI mode, or Recording and Analytics mode, this should be set to Do Not Generate.
	<b>Note:</b> TrueSpeech format is not supported on Windows 2008 Server, Windows Vista, or Windows 7. On these platforms, it is recommended to select <b>GSM</b> .
If compress format not available	Select what SpeechMiner should do if a user initiates playback of a call for which no compressed audio file is available. (If compressed audio is available, it is automatically used for playback.) Select one of the following options:
	<ul> <li>Play recognition file: The player should play the recognition audio file directly without any format conversion.</li> </ul>
	• <b>Convert the recognition file on-the-fly to:</b> The player should first convert the recognition audio file to the format selected here, and then play it for the user.
	If the system is used in the Recording UI mode, or Recording and Analytics mode, this should be set to Play recognition file.
Retention Policies	Specify the retention policy, per site, for each of the audio formats selected above. Call data is deleted from the store folder automatically when it has been in the folder as long as the specified retention period. The values chosen should be based mainly on the disk space available for storing the call audio. Bear in mind that 1MB of disk space can contain roughly one minute of uncompressed audio data or 15 minutes of compressed audio data.
	Default values are automatically entered for each site in the system, with separate retention periods for each of the formats selected under <b>Recognition Audio Format</b> and <b>Playback Audio Format</b> , in hours. You can manually adjust the retention period for each item, as required. To do so, double-click the item, or select it
	and then select . The <b>Retention Period</b> dialog box opens. Modify the value in the text field, and then click <b>OK</b> .
	If the system is used in the Recording UI mode or Recording and Analytics mode, set the retention policy of WAV_PCM to 0.
	<b>Note:</b> Selecting these options prevents the creation of unnecessary audio files and the storage of files for longer than is necessary.
	<b>Note:</b> The recognition audio files of calls that have not been processed yet, and of calls that are included in Static Call Lists, are not deleted even when the retention period is over.
	<b>Note:</b> If you do not want audio data to be deleted from the store folder automatically, enter the value -1. This value should only be used in static systems where the number of calls is limited and does not grow continuously.
Playback Speeds	Enter the playback speed options that should be available to users when they playback calls in the media player. For example, "1" means playback at the original speed, "2" means double-speed, etc.
	By default, only "1" is available. To add an additional speed, click . A new line is added to the list. Modify the value in the line as required, and then press <b>Enter</b> .
Encrypt audio files	Select this option if you want the audio files to be encrypted before they are saved in the store folder.
	When you select this option, the <b>New Password</b> field becomes active. Enter the encryption password in the

2. Click Save. The system implements the settings, and the Progress window opens and shows information about the process.

### Summary

The bottom of the **Audio** panel, under **Summary**, lists the audio formats that SpeechMiner supports, and the preferred formats, for each audio function:

Item	Function	Description
Input folder expects	Fetcher	Audio formats supported by fetchers; call audio that is retrieved from the external recording system by UConnector must be saved in the <u>input</u> folder in one of these formats
Recognition priorities	Recognition	Preferred audio formats for the recognition process, in order of preference; call audio that is processed by the Recognizers should ideally be in one of these formats
Playback priorities         Playback           Preferred audio formats for the SpeechMiner media player, in order of preferred is played back should ideally be in one of these formats		Preferred audio formats for the SpeechMiner media player, in order of preference; call audio that is played back should ideally be in one of these formats

### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Licenses Services Index Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Index

## Index

The Index panel enables you to manage index-related tasks: backup, restore, and index optimization.

/ <sup>0</sup> SpeechMiner Confi	guration Tool - 8.5	_ D ×
Sites & Machines	Daily Index Backup       Backup every day at       Backup every day at       Seep only last       Daily backup folder   Browse	
<u>Reports</u>	Manual Index Backup Backup to folder Browse Browse	
License	Use Different Credentials Username Password Domain	
Services	Backup Now Restore Index Folder	
6	Restore Index Folder Use restore carefully, for example when the Hard drive of the index folder crashes permanently	
	Veekly Index Optimization Optimize every week at Sunday 11:41:35 PM	
Index		
		Save

Index panel

### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Licenses Services Audio Setting the Date and Time Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Index > Backing Up the Index

## Backing Up the Index

You can back up the index automatically on a daily basis or manually as required. Note that no incremental backup is available; every time the backup is started, all of the index files are copied to the backup folder.

#### **Daily Backup**

You can set a time and specify a backup folder, and SpeechMiner will automatically back up the index every day at the specified time to the specified folder.

Backup every day at 2:16:00 PM	
Keep only last 5 👶 backups	
Daily backup folder Brows	

Index panel, Daily Index Backup region

#### To set up a daily backup of the index:

1. In the Index panel, in the Daily Index Backup region, fill in the fields as follows:

Field	Description
Backup every day at	Select the checkbox to activate the automatic daily backup, and then, in the time field, select the time at which you want to the backup to begin.
Keep only last	Select the number of backups to keep. Older backups will be deleted automatically.
Daily backup folder	Select the folder in which to store the backup data.

2. Select Save. The changes are saved, and a Progress window shows information about the saving process.

#### Manual Backup

You can select a folder and back up the index to that folder manually as necessary.

ckup to folder		Browse		
Use Different I	Credentials			
Username				
Password				
Domain				

Index panel, Manual Index Backup region

#### To run a backup of the index manually:

1. In the Index panel, in the Manual Index Backup region, fill in the fields as follows:

Field	Description	
Backup to	Select the folder in which to store the backup data.	

SpeechMiner® Administration Guide Release 8.5 © 2014, Genesys Inc. Unauthorized Reproduction is Prohibited

folder		
Use different credentials	If different credentials are required to access the index folder, select the <b>Use Different Credentials</b> checkbox, and then enter the required user credentials.	

2. Select Backup Now. The backup is performed, and a Progress window shows information about the backup process.

#### See also

Restoring the Index Optimizing the Index

Home > Configuring SpeechMiner > Index > Restoring the Index

## Restoring the Index

Restoring the index can be done in two different ways:

- Restoring the index from a backup, using SMConfig
- Deleting the existing index and creating a new one from scratch

### Restoring the Index from a Backup

If you have a backup of the index, it is generally preferable to restore the index from it. Restoring the index from a backup is generally a much quicker process than creating it from scratch, especially if the database is large. The index task re-indexes the database at a pace of about 3,500 calls per minute. If you restore the index from a backup, only those calls that were indexed after the backup was created must be re-indexed. Calls that are included in the backup do not have to be re-indexed. As a result, you can start using the index almost immediately.

Two alternative methods for restoring the index from a backup are available:

- 1. Use the backup folder as the current index folder.
- 2. Restore the index from the backup folder to a new index folder.

In either case, you should not restore the index folder manually. Instead, use SMConfig to perform the restoration. Using SMConfig ensures that the process is performed properly, and, in addition, SMConfig also takes care of re-indexing all the calls that were indexed after the backup was created.

#### To restore the index from a backup:

1. In SMConfig, in the Index panel, select Restore Index Folder. The Restore Index Folder dialog box opens.

<sup>U</sup> Restore Index Fold	er	
-Destination for restore		
To index folder:	<ul> <li>Minimum WEB down time) Make the backup folder the no</li> <li>(Recommended for the long run) Restore the backup to a New index folder path:</li> </ul>	
Source for restore		
From backup folder:	<ul> <li>Restore the latest valid daily backup</li> <li>Restore from a manual backup folder</li> </ul>	
	Manual backup folder:	Browse
User credentials	entials	
Username		
Password		
Domain [		
		OK Cancel

**Restore Index Folder dialog box** 

2. Fill in the fields as follows:

Field	Description
To index folder	Select (Minimum WEB down time) Make the latest valid backup folder the new index folder to use the backup folder as the new index folder, or (Recommended for the long run) Restore the backup to a new index folder location to create a new folder to use as the index folder.
	If you chose the second option, under <b>New index folder path</b> , select the folder to use as the new index folder. Note that this folder must be empty when you begin the restoration process.
From backup folder	Select <b>Restore the latest valid daily backup</b> to restore the index from the folder that contains the automatically generated backups of the index (specified in the <b>Index</b> panel under <b>Daily Backup Folder</b> ), or <b>Restore from a manual backup folder</b> to use a manually generated backup.
	If you chose the second option, under <b>Manual Backup Folder</b> , select the folder from which to take the backup.
Use Different Credentials	If different credentials are required to access the index folder, select the <b>Use Different</b> <b>Credentials</b> checkbox, and then enter the required user credentials

- 3. Click **OK**. The index is restored to the new index folder, and a **Progress** window shows information about the restoration process. during the process, SMConfig will also do the following:
  - Check the validity of the new index folder, and, if it is not valid, abort the process.
  - Insert indexing requests into the index queue for all the calls that were processed or updated after the backup was created.
  - Notify the Web servers that the index folder was changed.
- 4. When the restoration process is finished, restart the platform servers.

### Creating a New Index from Scratch

If you do not have a backup of the index, you can restore it by deleting the existing index and creating a new one. In addition, if the database is quite small, you may prefer to restore the index in this way even if you do have a backup.

Restoring an index by creating it from scratch is generally a much slower process than restoring it from a backup, especially if the database is large. The index task re-indexes the database at a pace of about 3,500 calls per minute. If you re-create the index from scratch, all of the calls in the database must be indexed.

#### To create a new index from scratch:

- 1. Stop all the Uplatform services that run index tasks.
- 2. Run the following SQL command: truncate table indexq
- 3. Delete all of the files in the index folder.
- 4. Run the following stored procedures in the database:
  - To re-index the calls, run exec dbo.sp\_reindexCallsByParams 3,0,0,"
  - To re-index the text interactions: exec dbo.sp\_reindexTextDataByParams 3,0,0,"

**Note:** Re-indexing the text interactions is only relevant in SpeechMiner versions from 7.3 and on, and only if your system handles text interactions as well as calls.

Restart the Uplatform services that you stopped before. After a minute or two, the index task will start to index the calls. Newer calls will be indexed first.

See also

Backing Up the Index Optimizing the Index

Home > Configuring SpeechMiner > Index > Optimizing the Index

## Optimizing the Index

The Index Optimization task optimizes the index files of the system, thus reducing their size. It is recommended to configure it to run at a time when the system is not in use, such as Sunday at midnight..

#### To configure the system to optimize the index:

- 1. In SMConfig, in the Index panel, in the Weekly Index Optimization region, select the Optimize every week at checkbox.
- 2. Select the day of the week on which to perform the optomization, and specify the time to begin the process.
- 3. Clcik Save. The setting is saved, and the Progress window opens and shows information about the saving process.

#### See also

Backing Up the Index Restoring the Index

Home > Configuring SpeechMiner > Setting the Date and Time

## Setting the Date and Time

The webServiceParams table has two fields for configuring the date and time display:

- globalDateFormat which configures the date format, for example: MM/dd/yy
- globalDateTimeFormat which configures the time format, for example: hh:mm tt

For additional information about the options available, see http://www.w3.org/TR/NOTE-datetime.

**Note:** When SpeechMiner's Spanish interface is used for the Web interface, the only formats supported for globalDateTimeFormat are the following 24-hour formats: H:mm:ss or H:mm.

### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Licenses Services Audio Index Configuring a VMWare Server Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Configuring a VMWare Server

## Configuring a VMWare Server

If you are installing SpeechMiner on virtual machines and using VMWare Server VSphere4, it is recommended to use the Scheduling Affinity feature, which dedicates specific logical CPUs for the virtual CPUs of particular VMs. Doing this can improve Recognition performance.

#### To use the VMWare Scheduling Affinity feature:

- 1. For each active Virtual Machine, check the VM Settings to see how many CPUs are configured for the machine.
- 2. In Setting\Resources tab\Advanced CPU\Scheduling Affinity, enter the serial numbers of the VMWare server's logical CPUs.

#### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Licenses Services Audio Index Setting the Date and Time Additional Configuration for Recording Modes

Home > Configuring SpeechMiner > Additional Configuration for Recording Modes

## Additional Configuration for Recording Modes

If using Recording modes, the following additional database configuration is required:

- In the configServer table, set the RcsUri value to the RCS URL, in the format: <u>http://host.port/rcs</u>, or <u>https://host.port/rcs</u>.
- In the cmrsParams table, set the RP\_Authorization and MCP\_Authorization values to the user and password that are configured for each of these components, respectively. Use the format user:password.
- In systems whose licenses are Call Recording Mode, or Call Recording and Analytics Mode, the Program ID is normally assigned to calls by the recording processor, which adds it to the call's metadata. If the call arrives in the Interaction Receiver input

folder without a Program ID, SpeechMiner assigns the default Program ID to it. The default Program ID is defined in the database, in the cmrsParams table, with the value of DEF\_PROGRAM\_EX\_ID. By default, this value is default. If you want to change this default value to some other value, you can do so as follows:

- For Call Recording and Analytics Mode licenses, in SMART, create a Program with the name you want to use for the default Program, and apply it. Finally, in the cmrsParams table, set DEF\_PROGRAM\_EX\_ID to the Program's external ID.
- For Call Recording Mode licenses, in the database, in the cmrsParams table, set DEF\_PROGRAM\_EX\_ID to the Program ID you want to use. (In this case, the Program ID and the Program Name are identical).

#### See also

Required Permissions Encrypting the Connection to the Database Opening SMConfig Saving Changes Sites & Machines Reports Licenses Services Audio Index Setting the Date and Time Configuring a VMWare Server Home > Configuring SpeechMiner > Additional Configuration for Recording Modes

# Snippets

Field	Description

List with pics:

1. Step

pic

caption

### See also

# Index

### С

Client Requirements 4

### I,

Implementation Checklist 3 Installation 3

### S

System Requirements 4

### W

Web Server Requirements 4 Welcome 1