

## **Genesys Quality Management 8.1**

# **Licensing and Activation**

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#### **Ordering and Licensing Information**

Complete information on ordering and licensing Genesys products can be found in the Genesys Licensing Guide.

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#### Chapter

# 1 Introduction

This chapter provides an overview of this document, identifies the primary audience, introduces document conventions, and lists related reference information.

This chapter contains the following sections:

Document Purpose Audience Document Version Typographical Conventions Expected Knowledge

## **Document Purpose**

This document describes the administration and configuration of the Genesys Call Recording software and describe the most important maintenance tasks for Administrators.

## **Audience**

This document is intended for the technicians responsible for system administration and maintenance.

## **Document Version**

The Genesys Quality Management products are provided by a partnership between Genesys and ZOOM International. The Genesys Quality Management products use a versioning format that represents a combination/joining of the versions used by these two separate entities. Although the Genesys Quality Management products and documentation use this combined versioning format, in much of the software and logs you will see the ZOOM versioning alone. You need to be aware of this, for example, when communicating with Technical Support.

The version for this document is based on the structure shown in the following diagram:



## **Typographical Conventions**

Names of functions and buttons are in bold. For example: Upload.

File names, file paths, command parameters and scripts launched from the command line are in non-proportional font.

Referred documents are in italics. For example: see the document *This is a Document* for more information.

Code is placed on a gray background and bordered

Hyperlinks are shown in blue and underlined: http://genesyslab.com/support/contact.

## **Expected Knowledge**

Readers of this document are expected to have the following skills or knowledge:

- · Basic functionality of Genesys Call Recording system
- Knowledge of Red Hat Enterprise Linux installation and configuration
- Unix-system administration skills

#### Chapter 1 Introduction



Chapter

# **2** Licensing and Activation

This chapter covers the procedures involved in licensing and activating your GQM installation.

Activating Call Recording
Activating Quality Manager

## **Activating Call Recording**

This section gives a step-by-step guide to activate Call Recording.

Activating Call Recording is the first task you should complete after installation of the system.

#### Important:

It is of utmost importance to activate your license file immediately. There is a 30 day grace period from the date of issue. At 00:00 hours on the 30th day, an un-activated license will stop working.

To access your installation's licensing information once you have installed and started Call Recording

Welcome to Call Recording Version: 8.1.500	Name : admin Password : ••••• Login
Genesys Call Recording powered by ZOOM CallREC English (US)	
Owner Expiration Date License State	
Base License ZOOM R&D 3/27/13 OK	
Support License Unknown License never expires Unknown	

Figure 1: Log in for Activation

Open the Call Recording web interface. Log in as admin and enter the password. If this is the first login after installation, enter the default password: admin; you will be prompted to change your password.



Figure 2: License Details

- 1. Open the Settings tab.
- 2. Click License info.
- 3. Click License Detail. The License activation form appears.

License activation

License Infor	mation	License Properties		License Feature
Product Name	Unknown	Registered terminals - warning	0	Recorder
Major Version	0	Registered terminals	0	Decoder
Minor Version	0	Concurrent calls - warning	0	SIP
Owner	Unknown	Concurrent calls	0	SKINNY
Commercial	false	Recorded calls - warning	0	JTAPI LDAP
Number	Unknown	Recorded calls	0	Advanced search
Product Edition	Unknown	Servers in cluster	0	API
Issue Date	-	Concurrent screens	0	LiveMON
Expiration Date	-	Concurrent screens - warning	0	Pre-recording
Expiration Date				Instreamer
•	Unknown			
License State	Unknown			ScreenREC

#### License details : Support License

License Infor	mation	License Properties		License Features
Product Name	Unknown	Max couples in database	0	
Major Version	0	Max users	0	
Minor Version	0	Max user groups	0	
Owner	Unknown	Max record capacity	0	
Commercial	false			
Number	Unknown			
Product Edition	Unknown			
Issue Date	-			
Expiration Date	-			
License State	Unknown			

Figure 3: No Base License Found

#### Uploading the Un-Activated Call Recording License File

Genesys Support has sent you an email containing an un-activated license file named callrec.license. Save your un-activated license file on your local computer in a location that you will be able to find. Do not rename this file.

#### Important:

Call Recording will not record without a valid license file.

First you must upload your un-activated license file. This generates your unique license key, based on information including the MAC addresses of the NICs in the server. If you have to change these, then you will require a new license file. Please contact Support at the email address listed at http://genesyslab.com/support/contact.

GENESYS CALL RECORDING Logged in as: admin
🚥 Recorded calls 🛛 📾 Restored calls 🥵 Users 🙀 Recording rules 🕂 Settings 📝 About 🔎 Audit 🗙 Logout
Configuration Logs Status Reporting License info
Licenses License details License Actions
License File Browse_ Upload
Reload License File Reload

Figure 4: License actions dialog

- 1. Open the Settings tab and click License info.
- 2. Click License Actions. The license action dialog appears.
- 3. Click **Browse** and navigate to the un-activated license file on your local computer.
- 4. Click Upload.

Licenses License	details License Actions				
<u> </u>	Q-B7CNY-DE63Y-KU7GJ-BD	6PR Request License File			
	: Base License	License Properties		License Features	
Product Name Major Version Minor Version Owner	CallREC 5 0 ZOOM Documentation	Registered terminals - warning Registered terminals Concurrent calls - warning Concurrent calls	10 10 10 10	Recorder   Image: Constraint of the second of the	
Commercial Number Product Edition		Recorded calls - warning Recorded calls Servers in cluster	10 10 1	JTAPI 🗹 LDAP 🗹 Advanced search 🖓 API 🖉	
Issue Date Expiration Date License State	27 September 2012 - Not Activated Evaluation	Concurrent screens Concurrent screens - warning	10 10	LiveMON Pre-recording Instreamer ScreenREC	
				Cisco UCCX IM Cisco UCCE IM Genesys IM	

Figure 5: Un-Activated License

Once the license has been successfully uploaded:

- 1. Your license key is visible on the License details tab.
- 2. Note the License State is Not Activated Evaluation.

#### Important:

If the system notifies you that you must reload your license file, follow the same procedure as above, and click **Reload**.

#### Activating an Un-Activated Version of Genesys Call Recording

To fully activate the system you must upload a permanent activated license. You can get a permanent activated license file in two ways:

With SMTP Access: If the server that Call Recording is installed on has SMTP server access, on the License Details page, click **Request License File**. This sends an email request to Genesys Labs, Inc. containing your license key.

**Without SMTP Access:** If the server that Call Recording is installed on has no SMTP server access or is installed behind a firewall, then send an email to Genesys Support at the email address listed at

<u>http://genesyslab.com/support/contact</u> with your complete license key. The key is required to generate your license file.

Genesys Support will send a permanent activated license file that corresponds to your system and purchase details. Save your activated license file on your local computer in a location that you will be able to find. Do not rename this file. The license file contains the parameters of your license, ensuring that all permitted features are properly activated.

GENESYS CALL RECORDING Logged in as: adm Recorded calls Restored calls & Users Recording rules F Settings About About Addit × Logo	_
Configuration Logs Status Reporting License info	)
Licenses License details License Actions License File Browse_ Upload Relead License File Delead	*
Reload License File Reload	

Figure 6: License Actions Dialog

The procedure for uploading the activated license is the same as for the unactivated license:

- 1. Open the Settings tab, and click License info.
- 2. Click License Actions. The license action dialog appears.
- 3. Click **Browse**, and navigate to the activated license file on your local computer.
- 4. Click Upload.

#### Important:

If the system notifies you that you must reload your license file, follow the same procedure as above, and click **Reload**.

Once the permanent license has been successfully uploaded, your license keys are visible on the **License details** tab.

If you have a support License, repeat the process for the support license. The license file will be named callrec-support.license.

<u> </u>	tion Q-B7CNY-DE63Y-KU7GJ-	BD6PR License already activated or	licen	se activation not required.
	: Base License			
License	Information	License Properties		License Features
Product Name	CallREC	Registered terminals - warning	10	Recorder 🛛
Major Version	5	Registered terminals	10	Decoder 🛛
Minor Version	0	Concurrent calls - warning	10	SIP 🔽
Owner	ZOOM Documentation	Concurrent calls	10	SKINNY 🔽
Commercial	true	Recorded calls - warning	10	JTAPI 🔽
Number	201110010000	Recorded calls		LDAP 🔽
			10	Advanced search 🗹
Product Edition		Servers in cluster	1	API 🔽
Issue Date	27 September 2012	Concurrent screens	10	LiveMON 🛛
<b>Expiration Date</b>	27 March 2013	Concurrent screens - warning	10	Pre-recording
License State	ок			Instreamer 🛛
				ScreenREC 🛛
				Cisco UCCX IM
				Cisco UCCE IM
				Genesys IM 🛛 🗹

Figure 7: Activated Licence

#### **Restarting Call Recording**

Access the Call Recording server via an ssh client for example PuTTY.

Log in as admin and enter: su - to log in as the root user. Enter the password (default is: zoomcallrec).

Enter the following command:

service callrec restart

Call Recording will restart. This may take a few minutes.

## **Activating Quality Manager**

#### Important:

You only need to do this step if you intend to use Quality Manager. If you have not purchased a Quality Manager license, skip this step.

Before you can begin to configure Quality Manager, you will need to upload and install a valid license.

You will need to know the web URL to the Call Recording installation. Genesys Support has sent an un-activated license file. Save this un-activated license file in a location where you can access it easily. Do not rename this file.

#### Open Quality Manager in your web browser

Open a web browser and enter the following URL:

http://<CallREC server>/scorecard-webui

Quality Manager will now open in the browser window. It usually takes a few seconds for the application to load before the login window appears.

#### Log In as Administrator

	Log In
Log In:	admin
Password:	••••
Log	In Forgot password? Clear
Lug	in rorgot password? Clear

Figure 8: Log in as Administrator

Log in as admin and enter the password (default: admin). The admin account is the only login that will work without a valid license.

Cł	oose a New Password
Your password	has expired. Please provide a new one.
Old Password:	•••••
New Password:	•••••
Repeat Password:	•••••
	Change and Continue Cancel

Figure 9: Choosing a New Password

When logging in for the first time, a password change is required. The default password admin can never be used again.

#### Important:

If you log in with an incorrect password twice, you will receive the message, "Warning: The next incorrect entry will lead to the account being locked". After the third attempt with the wrong password, the account will be blocked. This will become unblocked after a configurable period, typically half an hour.

#### Uploading the Un-activated Quality Manager License File

Click About in the left hand menu. The tab below opens.

About	
Product Info	
Version:	8.1.500
Build:	120929_1614
Upload License	
	Browse Upload License File
ile Upload Corrow ↓ Libra	ries > Documents > 5.0 - 47 Search 5.0 P
Organize	folder 🔠 👻 🛄 😧
☆ Favorites ↓ Downloads	Documents library     Arrange by: Folder ▼
Desktop Recent Places SharePoint	Name Callrec.license
200m_exec	scorecard.license
📃 Desktop 浸 Libraries	
Documents	
J Music	
E Pictures	▼
Fi	le name:  All Files  Open Cancel
	786x789

Figure 10: Browse to the License File and Click 'Upload License File'

- 1. Click **Browse**, and navigate to the folder containing the licence file named scorecard.license.
- 2. Select the license file.
- 3. Click Open.
- 4. Click Upload License File.

The license file generates a unique **Activation key** based on information including the MAC addresses of the NICs in the server. If the MAC addresses need to be changed, a new license file will be required. Please contact the email address listed at <a href="http://genesyslab.com/support/contact">http://genesyslab.com/support/contact</a> for assistance.

#### Tip:

If your import browser is Chrome, the file path may display incorrectly. For example, C:\fakepath\scorecard.license. This is an issue with Chrome and does not affect the upload.

#### **The Activation Key**

	🔽 Tooltips On 🥵 Admin, Admin (admin) 🚀 Logout 🖂 Mes
About 🗵	
Product Info	
Version:	8.1.500
Build:	120929_1614
Product License	
Product Name	Quality Manager
Product Version	5.0
Owner	ZOOM Documentation
Issue Date	Thu Sep 27 00:01:00 GMT+200 2012
Expiry Date	
License Type	COMMERCIAL
State	ок
Activation Key	DL5NM-KF6C5-YDAGJ-QE84H-NJ9A3
Maximum Allowed Users	100
Maximum Allowed Users [warning]	100
Upload License	
scorecard.license	Browse Upload License File

Figure 11: License is Now Uploaded

Once the un-activated license has been successfully uploaded, the Activation Key is visible on the Product License section of the About tab. Copy and paste the Activation Key into a new email and send it to the email address listed at <a href="http://genesyslab.com/support/contact">http://genesyslab.com/support/contact</a>. Genesys Support will send you an activated license file. Save this file where it can be access easily. Do not rename the file.

#### Important:

If the license file is not accepted, ensure that it is named scorecard.license.Try uploading it in either Firefox or Internet
Explorer if you have used a different browser, or try again after restarting Call Recording.

If you are still having an issue, contact Service and Support via the email address listed at <u>http://genesyslab.com/support/contact</u>.

#### Uploading the Activated Quality Manager License File

	File Upload	X
About 🗵	COC Cocuments > 10 - 47 Search 4.9	٩
Product Info		
Version:	Organize  Vew folder	
Build:	SharePoint Documents library Arrange by: Fol	lder 🔻
Product License	🔚 Libraries	
Product Name	Documents Name Date modi	fied
Product Version	Music 9/2/2011 1	1:44 AM
Owner	Pictures Callrec-support.license 9/2/2011 1	
Issue Date	Videos 9/2/2011 1	2:14 PM
Expiry Date	r Computer	
License Type		
State	Network	
Activation Key	▼ <	4
Maximum Allowed Users	File name: scorecard  All Files	-
Maximum Allowed Users [wa	Open 🔽 Ca	ancel
Upload License		
scorecard.license	Browse Upload License File	

Figure 12: Browse to the License File

- 1. Click **Browse**, and navigate to the folder containing the activated licence file named scorecard.license.
- 2. Select the license file.
- 3. Click Open.
- 4. Click Upload License File.

Please check the information on the About tab.

The GQM web server now has to be restarted. Log in to the server using an ssh client and switch to the root account, as described earlier for the Call Recording license.

#### Restart the Web UI using the following command:

/opt/callrec/bin/rc.callrec\_web restart

#### Chapter 2 Licensing and Activation



#### Chapter

## 3 **Request Technical Support**

#### **Technical Support from VARs**

If you have purchased support from a value-added reseller (VAR), contact the VAR for technical support.

#### **Technical Support from Genesys**

If you have purchased support directly from Genesys, please contact http://genesyslab.com/support/contact Genesys Technical Support.

