Genesys Quality Management 8.1

Licensing and Activation

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Table of Contents

Chapter 1 **Introduction** **4**
Document Purpose 5
Audience 5
Document Version 5
Typographical Conventions 6
Expected Knowledge 6

Chapter 2 **Licensing and Activation** **8**
Activating Call Recording 9
Uploading the Un-Activated Call Recording License File 11
Activating an Un-Activated Version of Genesys Call Recording 14
Restarting Call Recording 15
Activating Quality Manager 17
Open Quality Manager in your web browser 17
Log In as Administrator 17
Uploading the Un-activated Quality Manager License File 19
The Activation Key 20
Uploading the Activated Quality Manager License File 21

Chapter 3 **Request Technical Support** **24**

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.

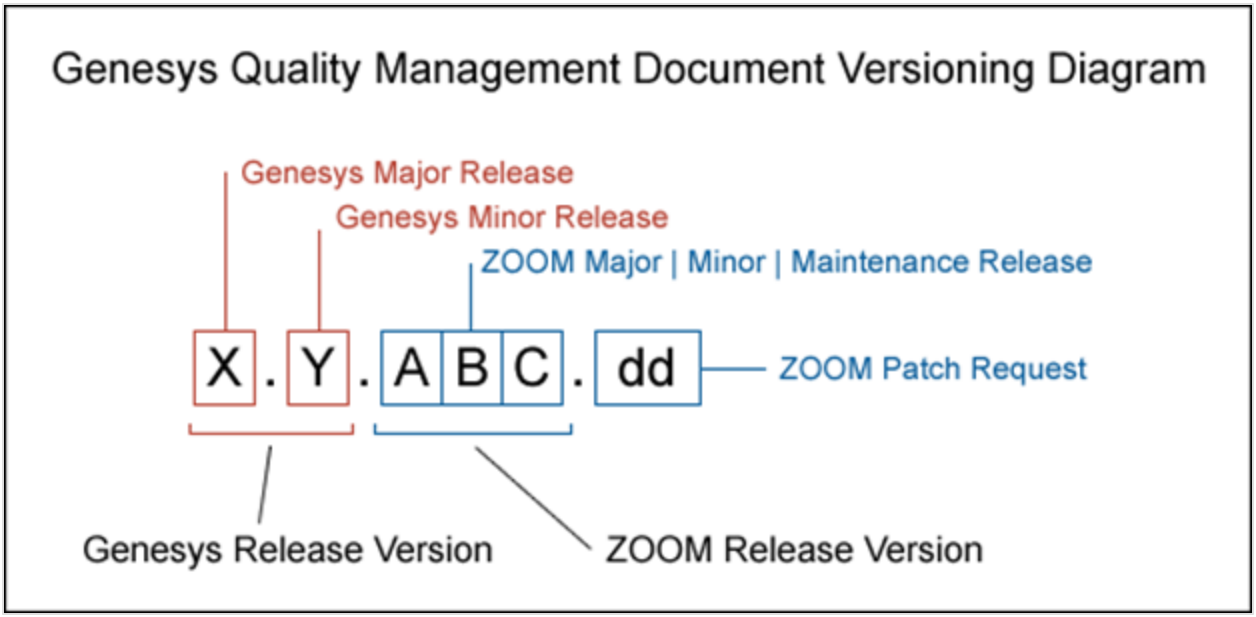
Audience

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

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

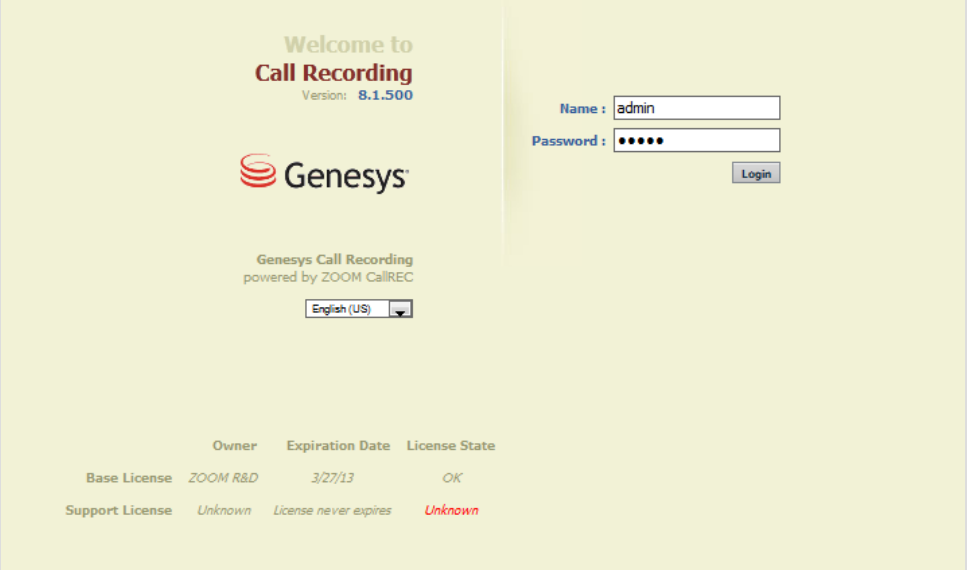


Figure 1: Log in for Activation

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.

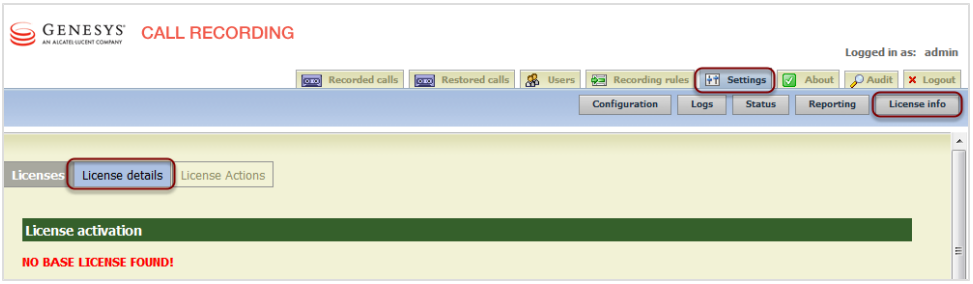


Figure 2: License Details

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

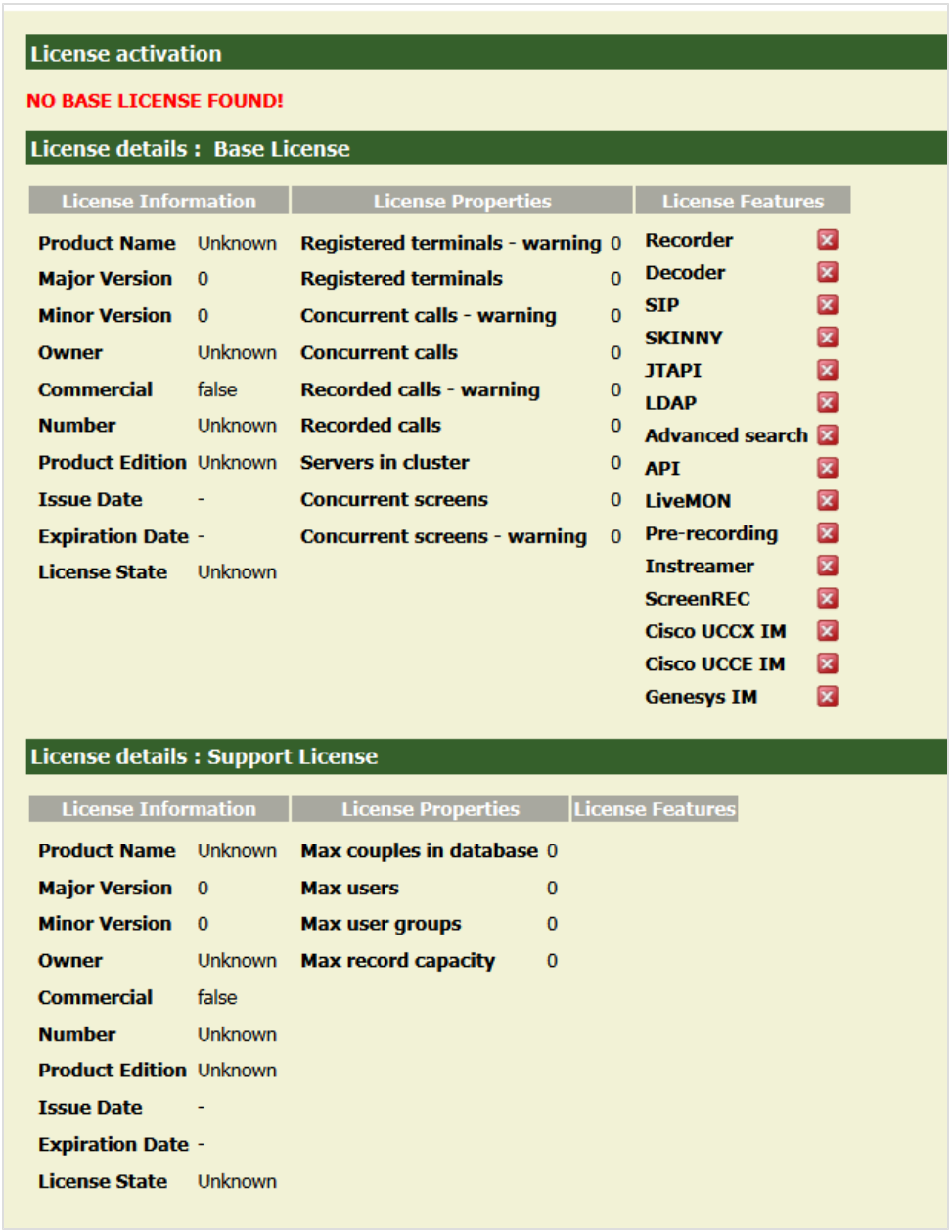


Figure 3: No Base License Found

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.

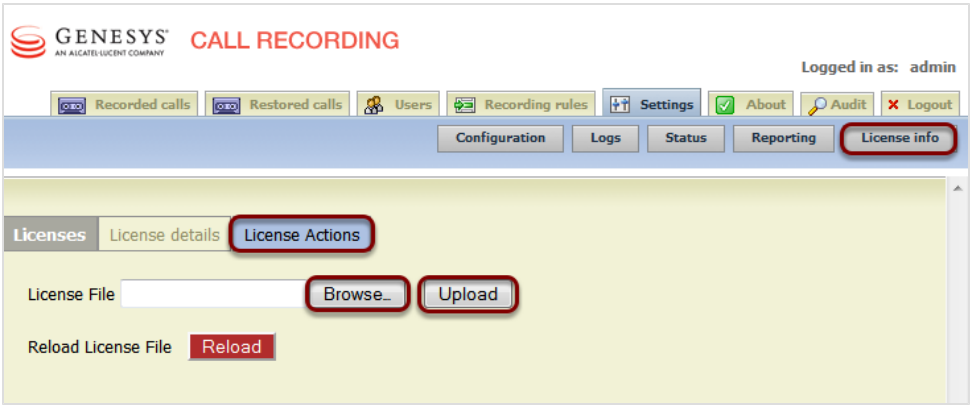


Figure 4: License actions dialog

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**.

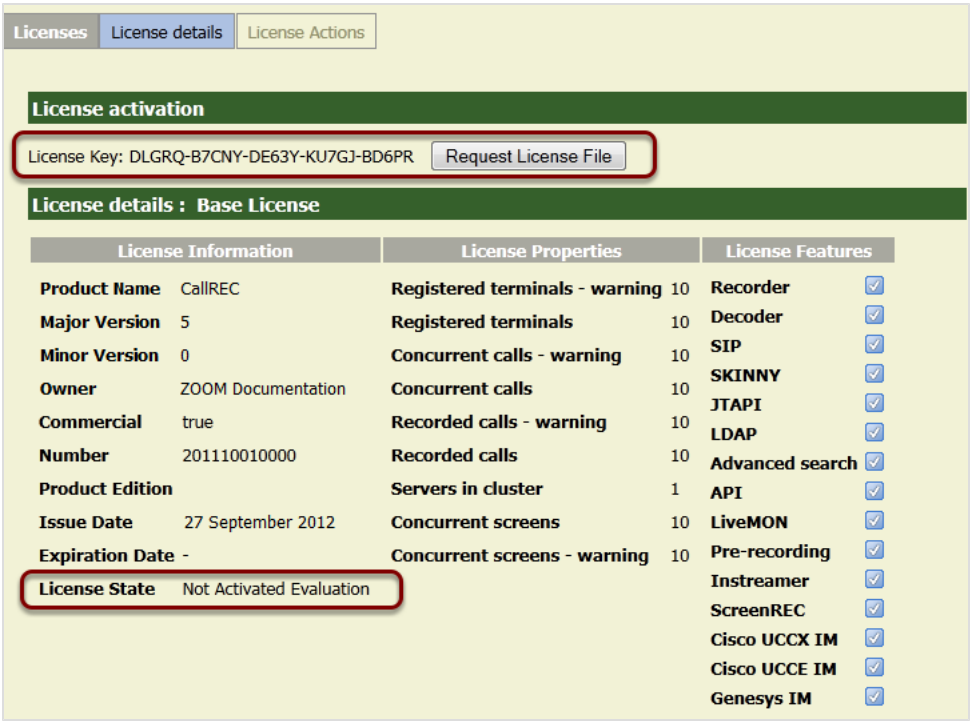


Figure 5: Un-Activated License

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 http://genesyslab.com/support/contact 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.

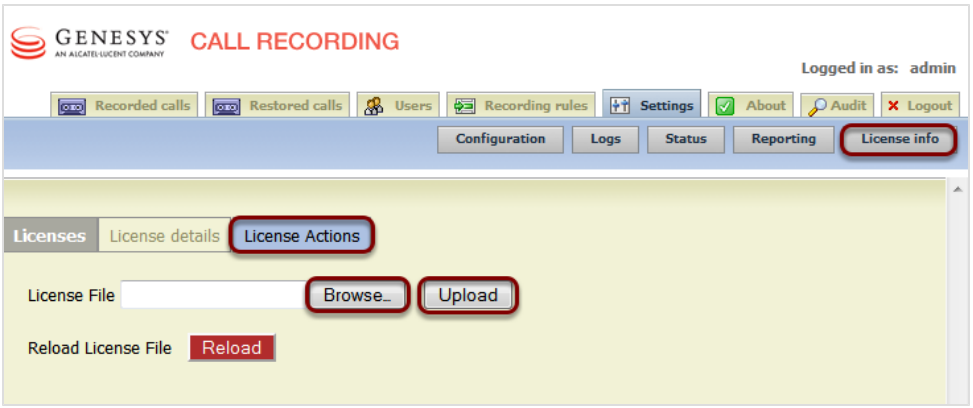


Figure 6: License Actions Dialog

The procedure for uploading the activated license is the same as for the un-activated 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`.

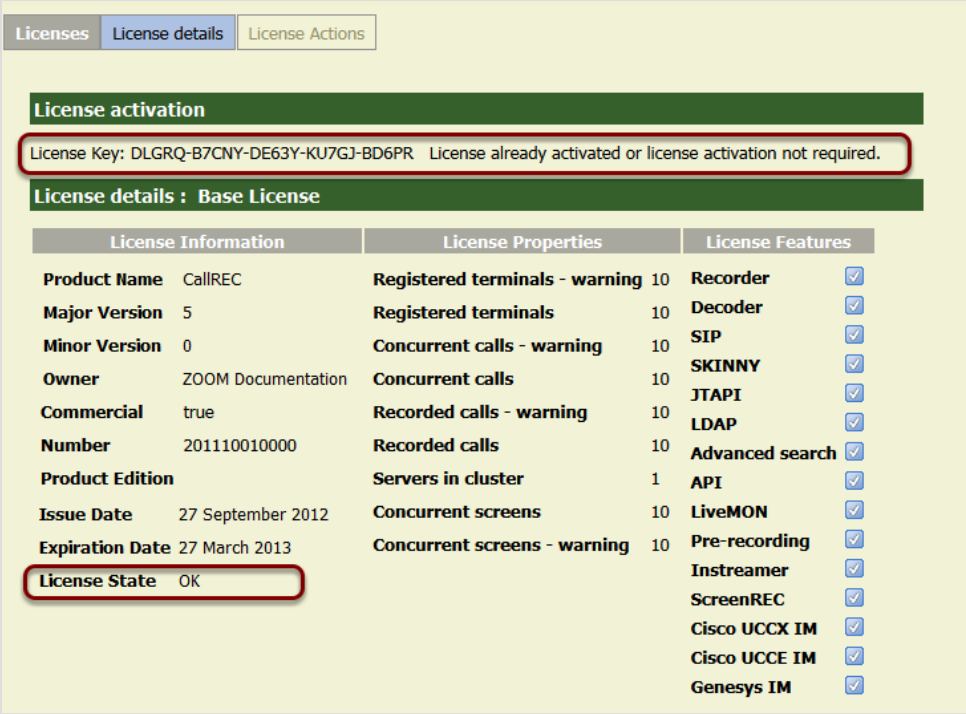


Figure 7: Activated Licence

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

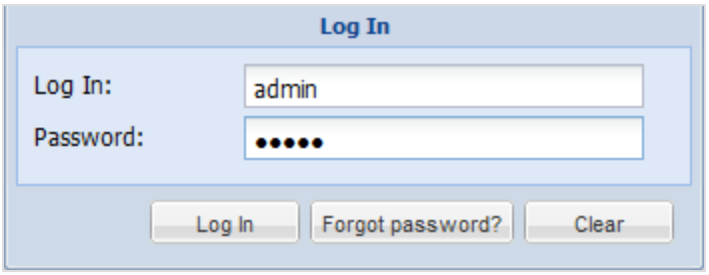


Figure 8: Log in as Administrator

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

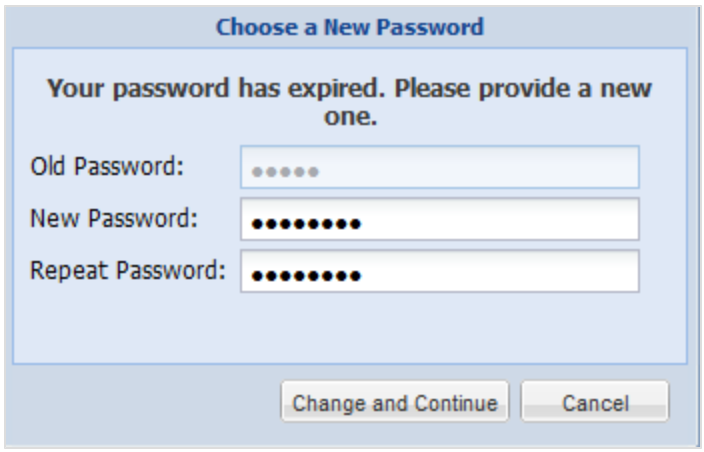


Figure 9: Choosing a New Password

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.

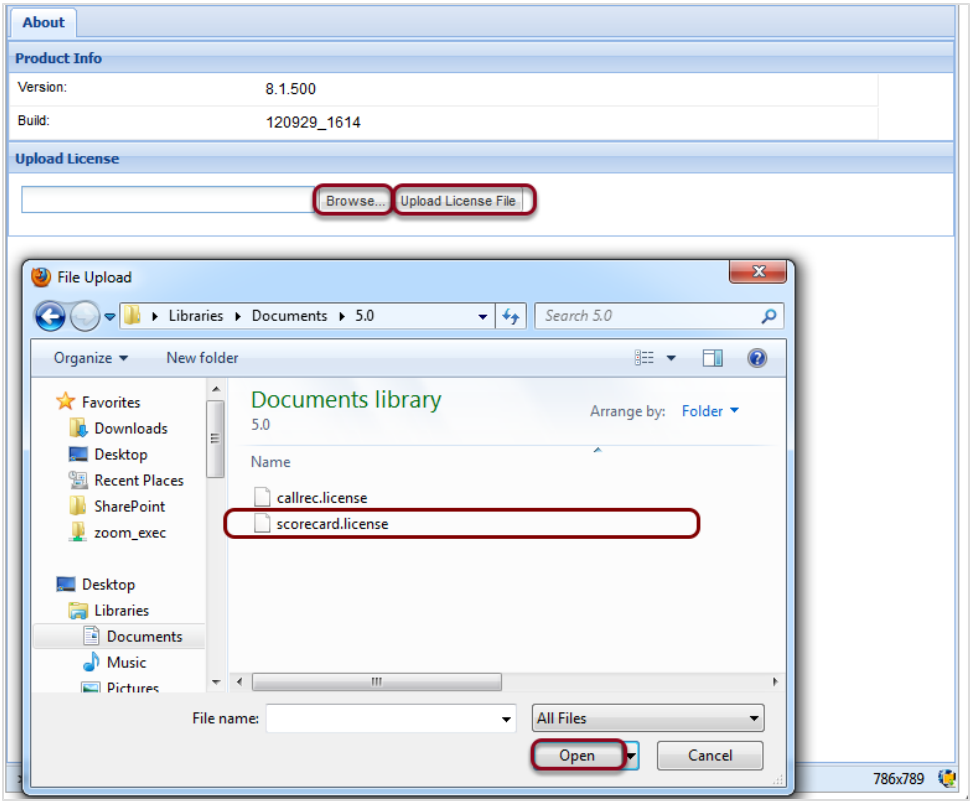


Figure 10: Browse to the License File and Click 'Upload License File'

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 http://genesyslab.com/support/contact 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

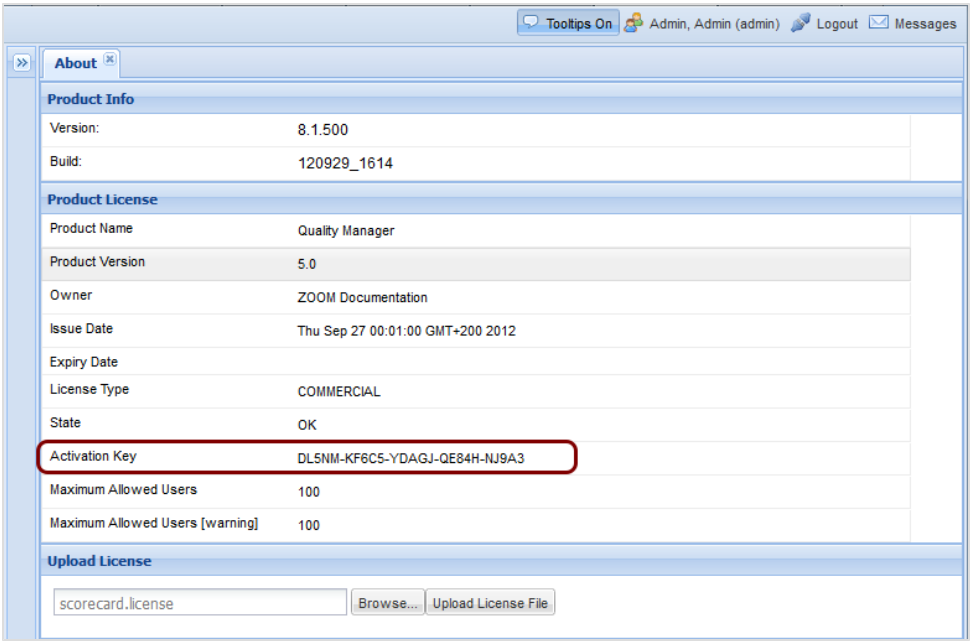


Figure 11: License is Now Uploaded

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 http://genesyslab.com/support/contact. 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 http://genesyslab.com/support/contact.

Uploading the Activated Quality Manager License File

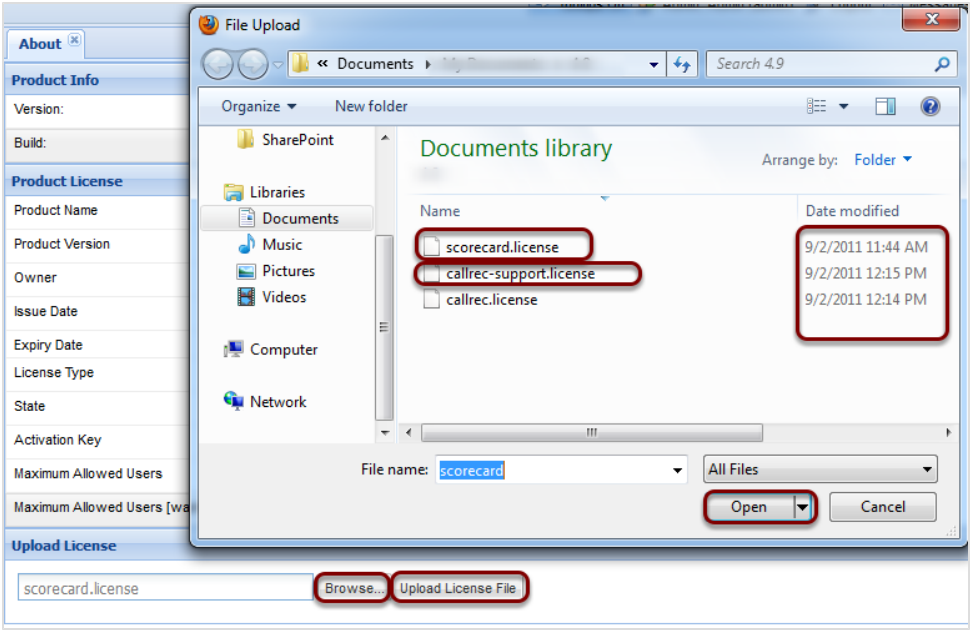


Figure 12: Browse to the License File

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

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.