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Genesys Interaction Recording Solution Guide

Deploying the Recording Plug-in for GAX

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Installing Recording Plug-in for GAX

Prerequisites

- For Recording Plug-in for GAX version 8.5.500.05 (or higher):
 - Required software: Genesys Administrator Extension 9.0.107.x or later.
 - Required software: **Interaction Recording Web Services** 8.5.205.69 (or higher) instance where the Recording Lifecycle Scheduler settings and Screen Recording Certificates are updated.
 - Required software: **Recording Crypto Server** 8.5.095.22 (or higher) instance to store the Recording Certificates.
- For Windows, keep the full path of your Recording Plug-in installation directory ready.
- For Linux, keep the full path of your Genesys Administrator Extension installation directory ready.
Keep the full path of your Recording Plug-in installation directory ready.

Important

The Recording Plug-in template XML file includes the role privilege data that must be imported into Genesys Administrator Extension.

The full path of the Recording Plug-in installation directory and the full path of the GAX installation directory should be different.

Installing the Plug-in

To install the Plug-in:

1. Install the Recording Plug-in IP.
 - For Windows, the file is located at <IP plugin directory>/setup.exe.
 - For Linux, the file is located at <IP plugin directory>/install.sh.
2. Perform one of the following as required:
 - For Recording Plug-in for GAX version 8.5.500.05 (or higher), copy the gax-rcs-8.5.5xx.xx.jar file from the installed Recording Plug-in folder to GAX_ROOT/webapp/WEB-INF/lib directory.
For example, copy gax-rcs-8.5.5xx.xx.jar from C:\Program Files\GCTI\RecPluginGAX64 to C:\Program Files\GCTI\Genesys Administrator Extension\webapp\WEB-INF\lib.
 - For Recording Plug-in for GAX version 8.5.097.61 (or lower), copy the gax-rcs-8.5.0xx.xx.jar file from the installed Recording Plug-in folder to GAX_ROOT/plugin-ns directory.
For example, copy gax-rcs-8.5.0xx.xx.jar from C:\Program Files\GCTI\RecPluginGAX64 to C:\Program Files\GCTI\Genesys Administrator Extension\plugin-ns.
3. Restart Genesys Administrator Extension.

4. Import the metadata to Genesys Administrator Extension:

- Log in to GAX.
- From the top menu, choose **Configuration > Application Templates**.
- Click **New**.
- Click **Import Metadata**.
- Click **Choose File** and choose the recording_plugin_855.xml file located in the **Templates** folder of Recording Plugin IP.
- Click **OK**.
- Provide a unique name for the template.
- Enter the Recording Plug-in version that is defined in recording_plugin_855.xml.
- Choose **Type** as **Genesys Administrator Server**.
- Click **Save**.

5. Upload and deploy the new SPD.

Installing the Plug-in via GAX Installation Package UI (Discontinued after GIR 8.5.224.00)

Important

The Recording Plug-in template XML file includes the role privilege data that must be imported into Genesys Administrator Extension. This data is imported when the IP and template files are imported into Genesys Administrator Extension.

Installing the Plug-in from within Genesys Administrator Extension

Prerequisites

- Be prepared to enter the directory path to an installation directory, or to a zipped file.
- Required software: Genesys Administrator Extension 8.1.4 or later.

To install the Plug-in:

1. Select **Installation Packages** from the **Administration** menu.
2. Click the "plus" icon (+) at the upper right of the **Installation Packages** window. The **Software Installation Wizard** dialog appears to the right of the current window, offering these **Import Type** Selection choices as radio buttons:
 - **Installation Package Upload (includes templates)**
 - **Installation Package Upload (template uploaded separately)**

- UNC Path to Mounted CD or Directory
 - UNC Path to an Existing Administrator Repository
 - UNC Path to Zipped IPs from Support
3. Select the radio button that matches your installation source and click the Next button.
 4. The next dialog will request input according to your choice in the previous step:
 - Installation Package Upload (includes templates) requires you to choose a zipped IP file.
 - Installation Package Upload (template uploaded separately) requires you to select a zipped IP file, an XML template and an APD template (all three).
 - Each of the three choices that begin with UNC Path requires a directory path that you may type or paste into the entry field. You may see a request to correct an error; type or paste your correction. When GAX is ready to install, the Finish button will be enabled.
 5. Click the Finish button and wait for the upload to complete. When you see the message, Import has started. You may now close this wizard, close the Software Installation Wizard dialog by clicking the Close button at the bottom right or the X icon at the top right. The Plug-in is ready to install.
 6. Select the item that you imported from the Installation Packages window. A dialog with that title appears to the right.
 7. The Genesys Interaction Recording Plug-in for GAX dialog offers these actions:
 - Download—Downloads the installation package to your computer.
 - Delete—Erases the IP.
 - Copy to Tenants—Copies the IP to the tenant(s) that you specify. Select a tenant and click Finish.
 - Deploy Profile: install—Displays the IP Deployment Wizard start dialog. All following steps in this procedure are the result of this choice.
 8. Click Next to display a list of host computers for possible installation. Select one or more hosts for installation using the check box to the left of each host name, then click Next.
 9. At the Application Parameters dialog, complete these fields:
 - Application name for host
 - Tenant Name
 - App port
 - Primary Configuration Server
 - Backup Configuration Server
 - Skip IP Re-install
- Notes:**
- Click the Information (i) icon to the right of each field title, for tool tip help.
 - A red * indicates a mandatory entry.
 - Click Next when you have completed all mandatory fields.
10. Perform this step depending on the OS:
 - For Windows, at the Installation Parameters (silent.ini) dialog, complete the IPCommon:
-

InstallPath field. This is the path where the IP binaries will be extracted to, and the directory must exist on the machine. The default answer offered is C:\genesys\GCTI\.

- For Linux, at the Installation Parameters (silent.ini) dialog, complete the following steps:
 - a. The IPCommon: InstallPath field. This is the path where the IP binaries will be extracted to, and the directory must exist on the machine. The default answer offered is /home/genesys/GCTI.
 - b. The RecPluginGAX: GAX_Directory field, which corresponds to the installation root folder for the GAX installation. The Recording Plugin for GAX jar file should be placed in <GAX_ROOT>/webapp/WEB-INF/lib directory.
11. At the Deployment dialog, verify that the answers you gave are all correct. If they are correct, click Finish and wait for the installation to complete.
 12. Restart Genesys Administrator Extension.

Upgrading the Plug-in

Using GAX 8.1.4

If you are using Genesys Administrator Extension version 8.1.4, perform the following steps:

Prerequisites

- The previous version of the Plug-in must be uninstalled.
- Be prepared for these information requests and choices:
 - You will need the full path to your Genesys Administrator Extension installation.
 - You will either confirm the default installation directory, or enter a new one.
 - If the target installation directory is populated, you will choose an action:
 - Back up all files in the directory.
 - Overwrite only the files contained in this package.
 - Wipe the directory clean.
- Perform Step 4 of the **Installing the Plug-in** section. This is required to import the Plug-in metadata to Genesys Administrator Extension.

1. Stop Genesys Administrator Extension.

2. Run the installation executable:

- For Windows, this file is <IP plugin directory>/setup.exe.
- For Linux, this file is <IP plugin directory>/install.sh.
- Copy gax-rcs-8.5.xxx.xx.jar from the installed Recording Plug-in folder to GAX_ROOT/plugin-ins directory.
For example, copy gax-rcs-8.5.097.57.jar from C:\Program Files\GCTI\RecPluginGAX64 to C:\Program Files\GCTI\Genesys Administrator Extension\plug-ins.

- Start Genesys Administrator Extension.
- Upload and deploy the new **SPD** file.

Using GAX 9.0.107.x (or higher)

If you are using Genesys Administrator Extension version 9.0.107.x or later, perform the following steps:

Prerequisites

- The previous version of the Plug-in must be uninstalled:
 - For Windows, use the **Control Panel** to uninstall the Plug-in. You must manually remove the Plug-in `gax-rcs-8.5.5xx.xx.jar` file from the `GAX_ROOT\webapp\WEB-INF\lib` directory.
 - For Linux, manually remove the Plug-in `gax-rcs-8.5.5xx.xx.jar` file from the `GAX_ROOT/webapp/WEB-INF/lib/` directory.
- Be prepared for these information requests and choices:
 - You will need the full path to your Genesys Administrator Extension installation.
 - You will either confirm the default installation directory, or enter a new one.
 - If the target installation directory is populated, you will choose an action:
 - Back up all files in the directory.
 - Overwrite only the files contained in this package.
 - Wipe the directory clean.
- Perform Step 4 of the **Installing the Plug-in** section. This is required to import the Plug-in metadata to Genesys Administrator Extension.

1. Stop Genesys Administrator Extension.
2. Delete the previous version of the plug-in .jar file (for example, `gax-rcs-8.5.5xx.xx.jar`) from the `GAX_ROOT/plugin/` directory.
3. Copy the `gax-rcs-8.5.5xx.xx.jar` file from the installed Recording Plug-in folder to `GAX_ROOT/webapp/WEB-INF/lib` directory.
For example, copy `gax-rcs-8.5.5xx.xx.jar` from `C:\Program Files\GCTI\RecPluginGAX64` to `C:\Program Files\GCTI\Genesys Administrator Extension\webapp\WEB-INF\lib`.
4. Start Genesys Administrator Extension.
5. Upload and deploy the new **SPD** file.

Configuring the Plug-in

For the Recording Plug-in connection to the Recording Crypto Server in the Genesys Administrator Extension application connections, add a connection to the Recording Crypto Server application. If

the Recording Crypto Server is setup in HA mode where there are multiple Recording Crypto Server instances behind a load balancer, set this connection to the [Recording Crypto Server cluster application](#).

Configure for Screen Recording

Single-Tenant Environment

1. Using Genesys Administrator Extension, navigate to **Configuration > Applications > <Genesys Administrator Extension Application Object> > Application Options**.
2. Under the **rcs** section, set the **htcc_base_url** parameter to the Interaction Recording Web Services server URL (or Web Services server URL if you're using version 8.5.210.02 or earlier); for example; `http://<Interaction Recording Web Services IP Address>:8081`

Multi-Tenant Environment

1. Using Genesys Administrator Extension, navigate to **Configuration > Tenant> <Tenant Object> > Options**.
2. Under the recording section, set the **htcc_base_url** parameter to the Tenant-specific Interaction Recording Web Services load balancer URL (or Web Services server URL if you're using version 8.5.210.02 or earlier); for example; `http://<Interaction Recording Web Services IP Address>:8081`

Important

If this parameter does not exist or has an empty value, the Recording Plug-in retrieves the Interaction Recording Web Services (Web Services) base URL from the **htcc** section of the configured Recording Crypto Server parameters.

Configuring Transport Layer Security

1. Review the documentation for TLS support for GAX at [Transport Layer Security \(TLS\)](#).
2. Configure TLS for Interaction Recording Web Services (see [Configuring TLS on the Server-Side for Interaction Recording Web Services](#)) and Recording Crypto Server (see [Configure HTTP](#)).
3. Add a CA certificate to the trust store by executing the following command line:

```
keytool -importcert -file <root_ca_certificate_of_rcs/rws> -keystore keystore
```
4. Configure the trust store location for GAX by updating the Java environment. For example, on Linux or Windows you can configure this by adding the following lines to the **setenv.sh** or **setenv.bat** script, respectively:

```
set JAVA_OPTS=%JAVA_OPTS% -Djavax.net.ssl.trustStore="<path to keystore file which is generated using above command>"
set JAVA_OPTS=%JAVA_OPTS% -Djavax.net.ssl.trustStorePassword="<password>"
```
5. Enable Transport Layer Security (TLS) certificate validation by using the following parameters:

- **trusted_ca_rcs** - Configures whether or not the certificate will be validated when making a secure outbound connection to Recording Crypto Server (RCS). This parameter can be configured in the **[rcs]** section of the GAX application object or in the **[recording]** section of a specific tenant object. If this parameter is configured in both sections, then the tenant level configuration takes higher priority than the application level. Valid values are `true` or `false`. This parameter is optional, and defaults to `true`.
- **trusted_ca_rws** - Configures whether or not the certificate will be validated when making a secure outbound connection to Interaction Recording Web Services (RWS). This parameter can be configured in the **[rcs]** section of the GAX application object or in the **[recording]** section of a specific tenant object. If this parameter is configured in both sections, then the tenant level configuration takes higher priority than the application level. Valid values are `true` or `false`. This parameter is optional, and defaults to `true`.

When validation is disabled, all the certificates are not validated, thereby ignoring the following:

- Expired certificates
- Certificates with missing chain
- No trusted CA installed in case of self signed certificate

Configure Roles and Privileges

To configure the roles and privileges required for Genesys Interaction Recording, see [Configuring Access Control for GIR Users](#).

For more information about the Plug-in options, see the [Genesys Interaction Recording Options Reference](#).