



CUSTOMEREXPERIENCEMANAGEMENT

SCREEN CAPTURE GUIDE

PURPOSE: This guide is intended to provide detailed instructions for installation and setup of CXM® Screen Capture.



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For more information about CXM®, see your CXM® representative or call 1-866-400-4296.

The purpose of this guide is to provide detailed instructions for the installation and setup of CXM® Screen Capture. This document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Co-nexus. Co-nexus assumes no responsibility or liability for any errors or inaccuracies that may appear in this book.

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CUSTOMEREXPERIENCEMANAGEMENT

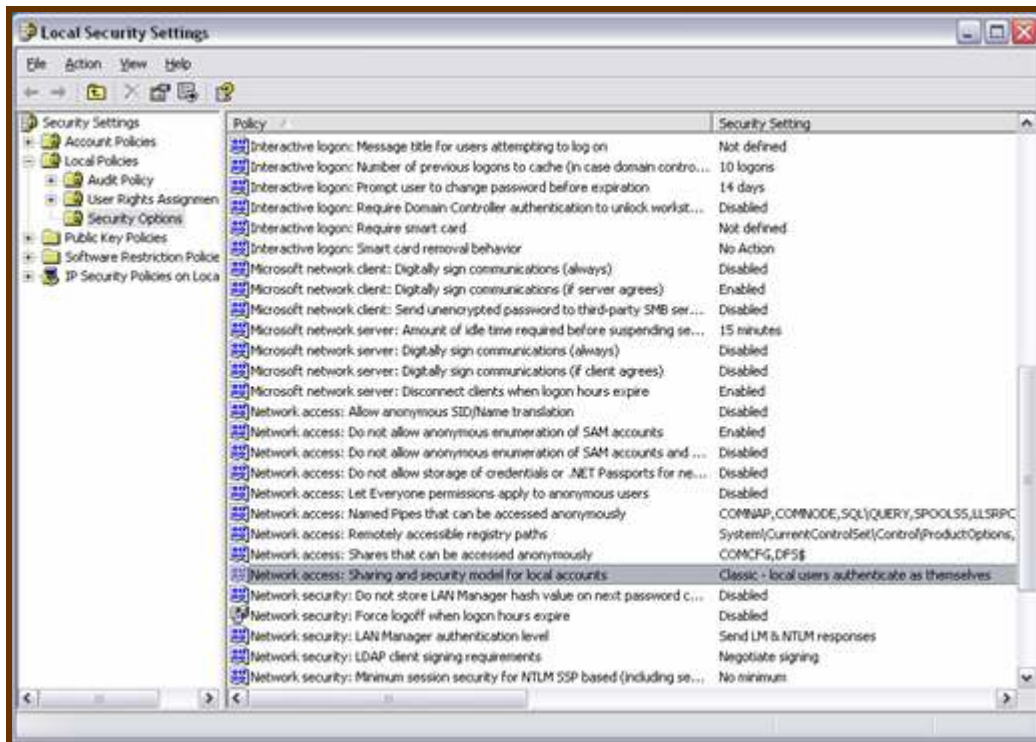
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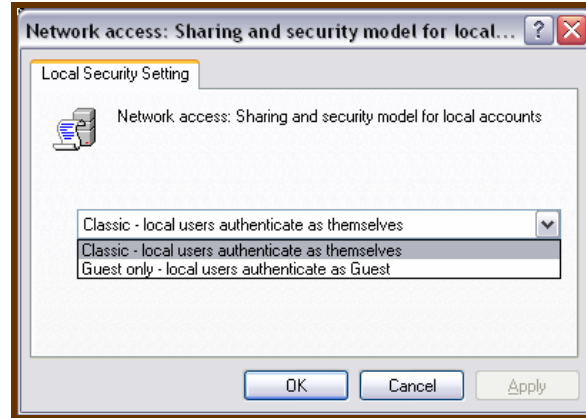
LOCAL SECURITY SETTINGS

On machines running Windows 2003 or Windows XP, there is a Local Security setting that needs to be changed. This must be done before any Proxy software is installed.

1. Go to Windows Control Panel → Administrative Tools → Local Security Settings.



2. Expand *Local Policies* and select *Security Options*.
3. On the right, locate and double-click on *Network Access: Sharing and Security Model*. A Local Security Setting window will appear.

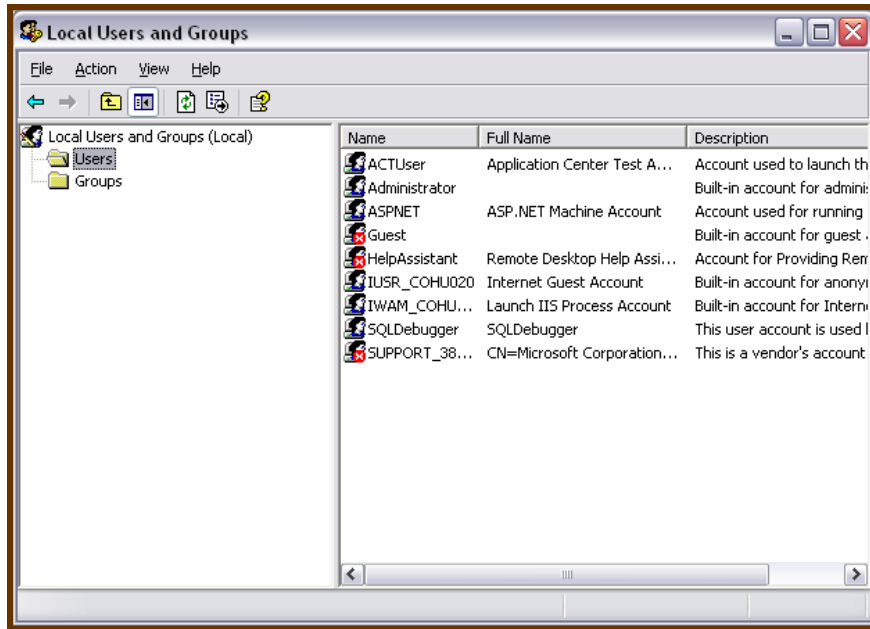


4. In the window that appears, select *Classic* from the drop-down box.
5. Click *OK*.

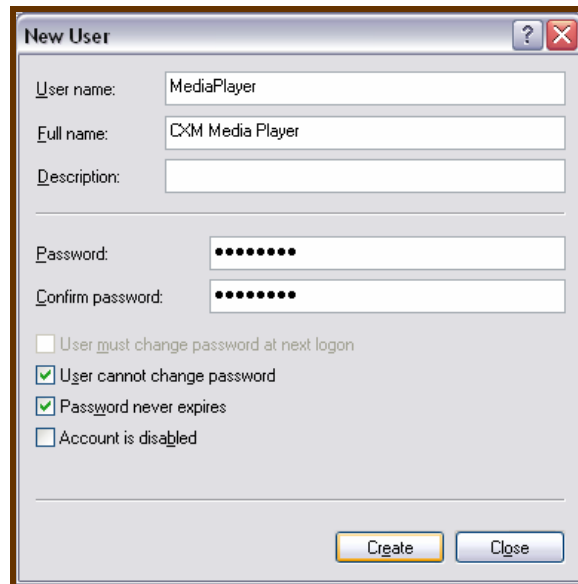
ADD CXM® MEDIA PLAYER USER

A local user will need to be added to the Screen Capture server for the CXM® Media Player.

1. Go to Windows Control Panel → Local Users and Groups.



2. Right-click on *Users* and select *Add User*. A *New User* box will appear.



3. Add the New User with the following information:
 - User Name: MediaPlayer
 - Full Name: CXM Media Player
 - Password: password
 - Uncheck *User must change password at next login*.
 - Select *User cannot change password*.
 - Select *Password never expires*.
4. Click the *Create* button to create the new user. The new user will appear in the list of local users.

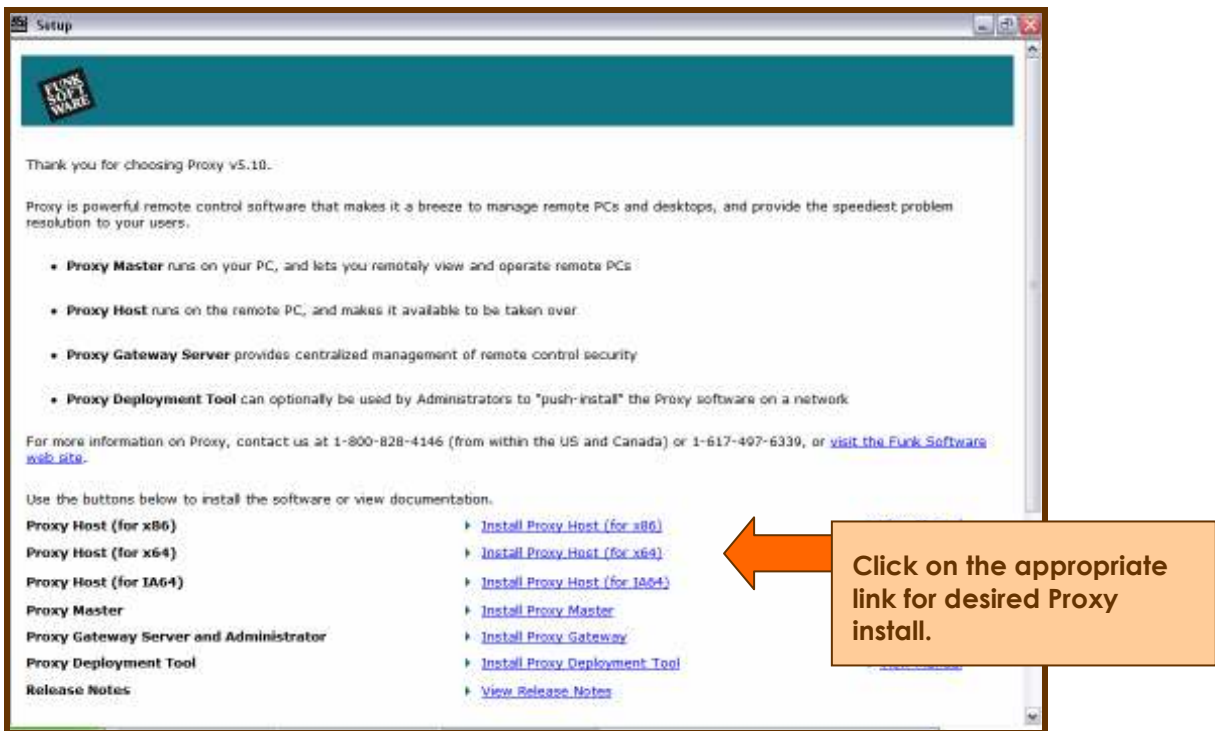
PROXY SETUP

The Proxy setups are located on the CXM® Screen Capture CD.

The Proxy software needed for CXM® Screen capture includes:

- **Proxy Gateway Server:** provides centralized management of remote control security. This should be installed on the CXM® Screen Capture Server.
- **Proxy Deployment Tool:** can optionally be used by Administrators to “push-install” the Proxy software on a network. This should be installed on the CXM® Screen Capture Server.
- **Proxy Host:** Client software used for screen recording. This should be installed on all machines that need to be screen recorded.

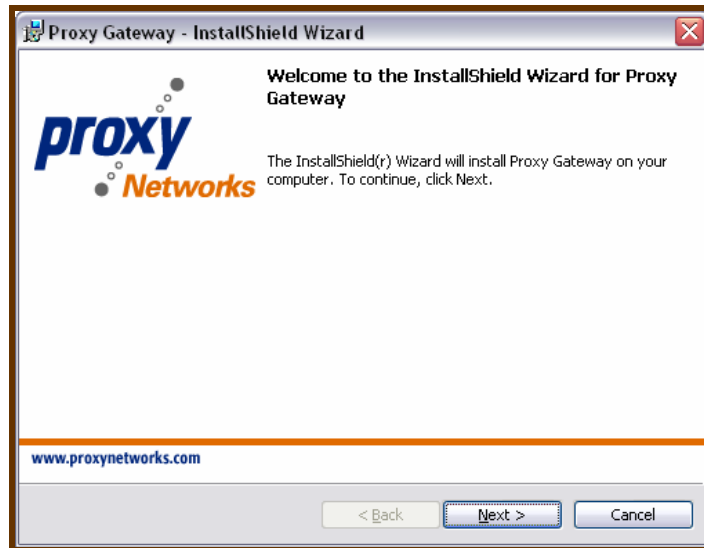
To access any of these setups, run the Setup.exe from the CXM® Screen Capture CD, then click on the appropriate link from the bottom section of the Setup screen.



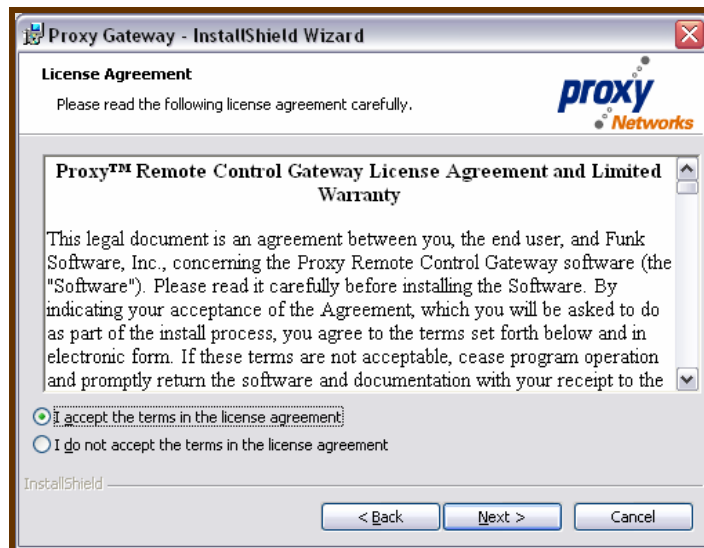
PROXY GATEWAY INSTALL

The Proxy Gateway should be installed on the CXM Screen Capture Server.

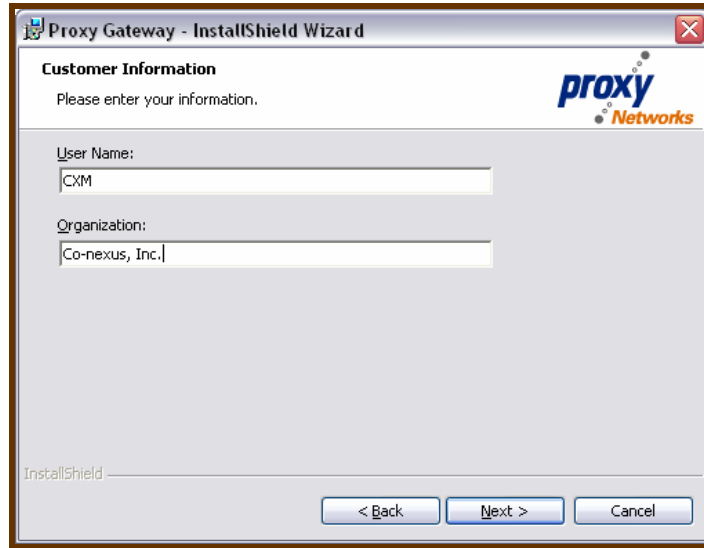
1. Run the Proxy Setup (see [Proxy Setup](#) section for further instructions).
2. Click on the *Install Proxy Gateway* link at the bottom of the Setup page. The following screen will appear:



3. Click the *Next* button. The License Agreement will appear:



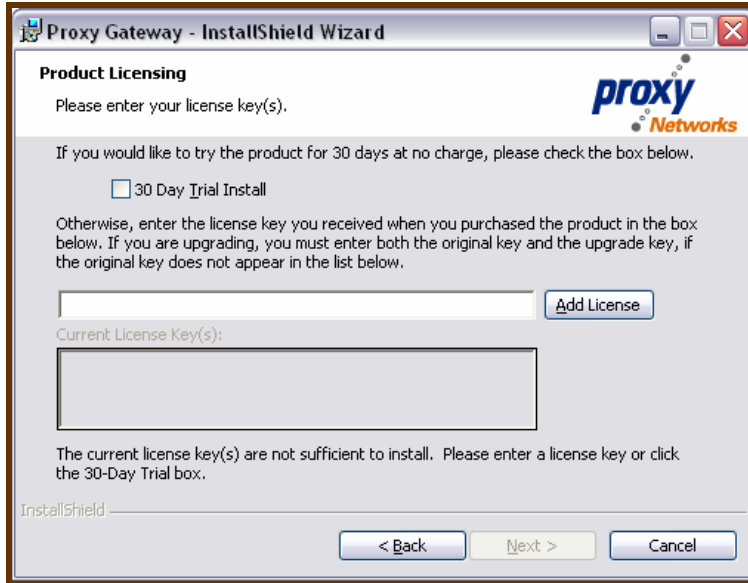
4. Select *I accept the terms in the license agreement* and click the *Next* button. The *Customer Information* screen will appear:



5. Enter "CXM" into the *User Name* field and "Co-nexus, Inc." into the *Organization* field.
6. Click *Next*. The *Custom Setup* screen will appear:



7. Click *Next*. The *Product Licensing* screen will appear:



8. Enter the appropriate License Key in the *Add License* field and click the *Add License* button. The License Key will appear in the *Current License Key* box. (Contact your CXM® sales representative for your License Key.) Record your license key here: _____
9. Click *Next*. The *Gateway Server Account* screen will appear:

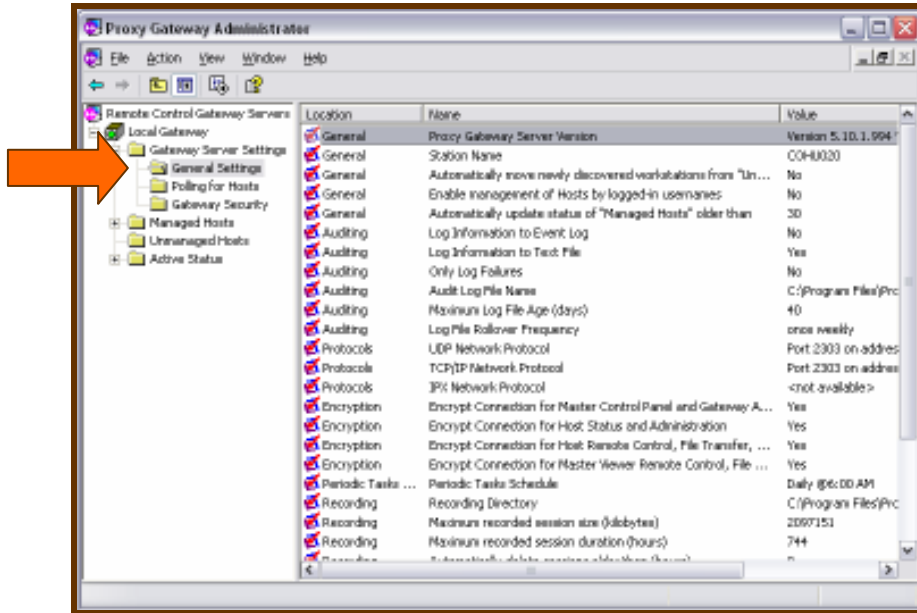


10. Enter the Gateway Server Account as the domain CXMServices Account.
11. Enter the password for the CXMServices account. Click *Next*. Proxy Gateway installation will be complete.

PROXY GATEWAY SETTINGS

After Proxy Gateway has been installed, some basic settings will need to be made.

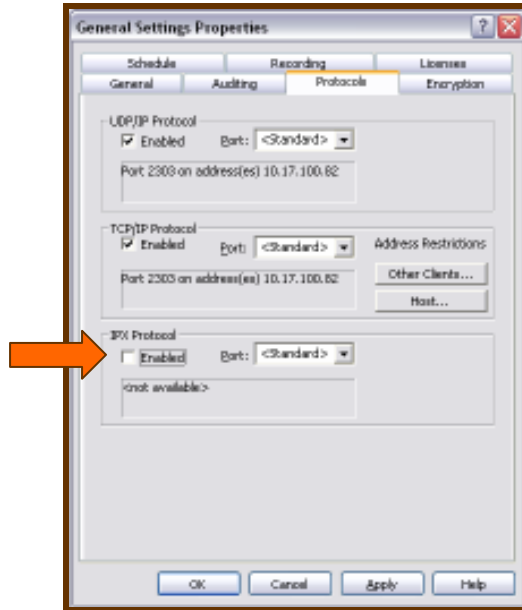
1. Go to Start → Programs → Funk Software → Proxy → Proxy Gateway Administrator.



2. Under *Gateway Server Settings*, right-click on *General Settings* and select *Properties* from the menu. The following window will appear:



3. Under the *General* tab, check “Automatically move newly discovered workstations...”
4. Select “Update Host status every...” and set it to 15 minutes.
5. Click *Apply*.
6. Select the *Protocols* tab.



7. Uncheck the IPX Protocol *Enabled* box.
8. Click *OK* to close this dialog box.
9. Under *Gateway Server Settings*, select *Gateway Security*.



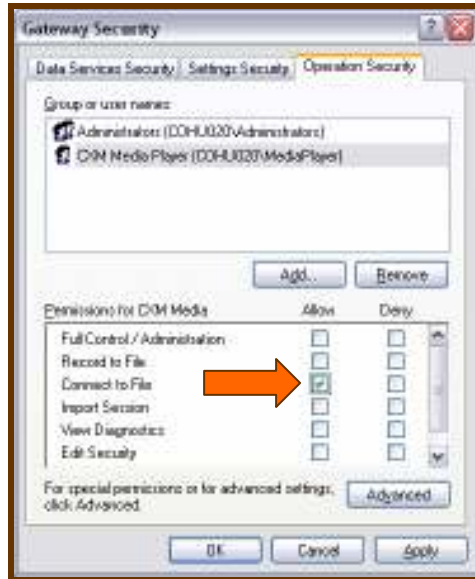
- In the right pane, click on the first option to change Data Services Security. The *Gateway Security* box will appear:



- Under the *Data Services Security* tab, add the local MediaPlayer account to the list of user names by clicking the *Add...* button. A dialog box will appear. Enter "MediaPlayer" into the field and click OK.
- The CXM Media Player account now appears in the *Group or user names* list. In the *Permissions for CXM Media* section, do not change the default settings. Click *Apply*.
- Select the *Settings Security* tab.



13. Under the *Security Settings* tab, add the local MediaPlayer account to the list of user names by clicking the *Add...* button. A dialog box will appear. Enter "MediaPlayer" into the field and click *OK*.
14. The CXM Media Player account now appears in the *Group or user names* list. In the *Permissions for CXM Media* section, do not change the default settings. Click *Apply*.
15. Select the *Operation Security* tab.



16. Under the *Operation Security* tab, add the local MediaPlayer account to the list of user names by clicking the *Add...* button. A dialog box will appear. Enter "MediaPlayer" into the field and click *OK*.
17. The CXM Media Player account now appears in the *Group or user names* list. In the *Permissions for CXM Media* section, uncheck the *Record to File* option and check the *Connect to File* option. Click *Apply*.
18. Select the *Data Services Security* tab.



19. Under the *Data Services Security* tab, add the local CXMServices account to the list of user names by clicking the *Add...* button. A dialog box will appear. Enter “cxmservices” into the field and click OK.
20. The CXMServices account now appears in the *Group or user names* list. In the *Permissions for ccm-services* section, select all of the *Allow* options. Click *Apply*.
21. Select the *Settings Security* tab.



22. Under the *Settings Security* tab, add the local CXMServices account to the list of user names by clicking the *Add...* button.

A dialog box will appear. Enter "cxmservices" into the field and click OK.

23. The CXMServices account now appears in the *Group or user names* list. In the *Permissions for cxmservices* section, select all of the *Allow* options. Click *Apply*.
24. Select the *Operation Security* tab.

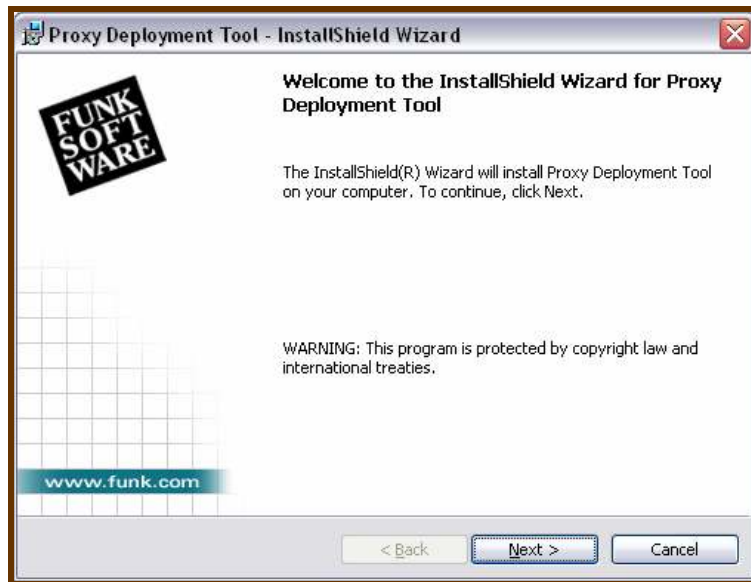


25. Under the *Operation Security* tab, add the local CXMServices account to the list of user names by clicking the *Add...* button. A dialog box will appear. Enter "cxmservices" into the field and click OK.
26. The CXMServices account now appears in the *Group or user names* list. In the *Permissions for cxmservices* section, select all of the *Allow* options. Click *Apply*.
27. Click *OK* to close this dialog box.

PROXY DEPLOYMENT TOOL INSTALL

The Proxy Deployment Tool should be installed on the CXM Screen Capture Server.

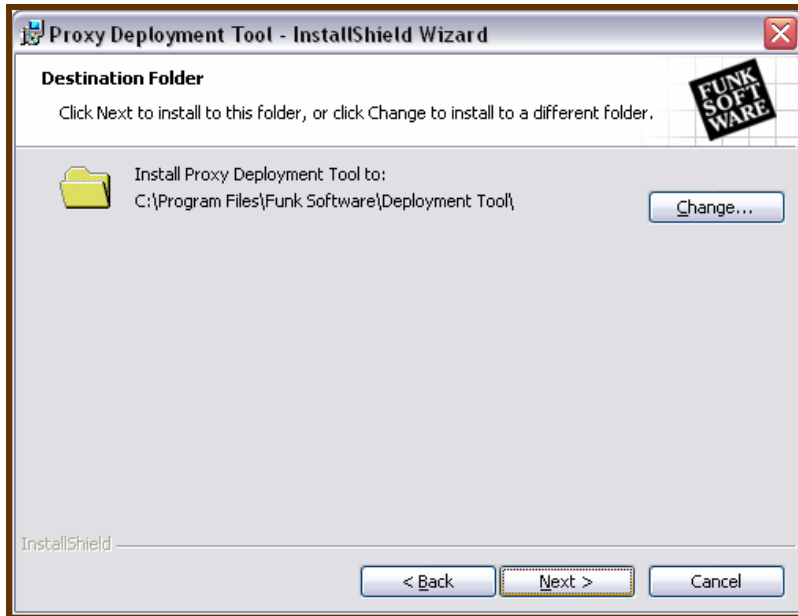
1. Run the Proxy Setup (see [Proxy Setup](#) section for further instructions).
2. Click on the *Install Proxy Deployment Tool* link at the bottom of the Setup page. The following screen will appear:



3. Click *Next*. The *License Agreement* screen will appear:



4. Select *I accept the terms in the license agreement*.
5. Click *Next*. The *Destination Folder* screen will appear:

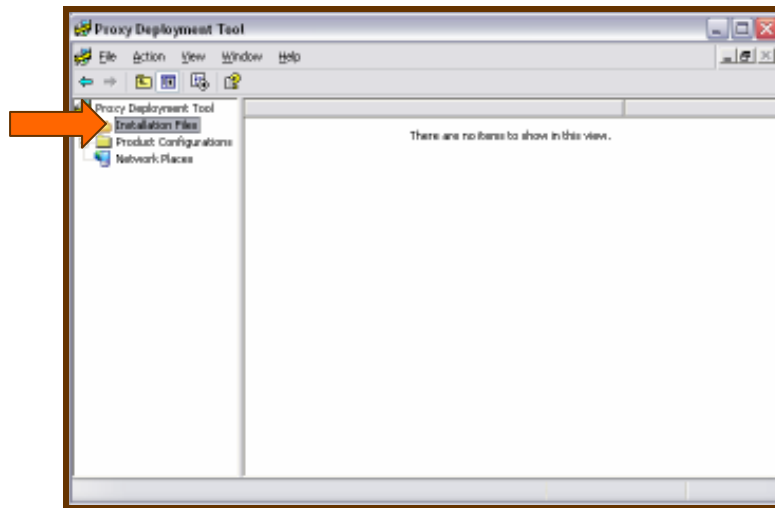


6. Click *Next*. Installation of the Proxy Deployment Tool will be completed.

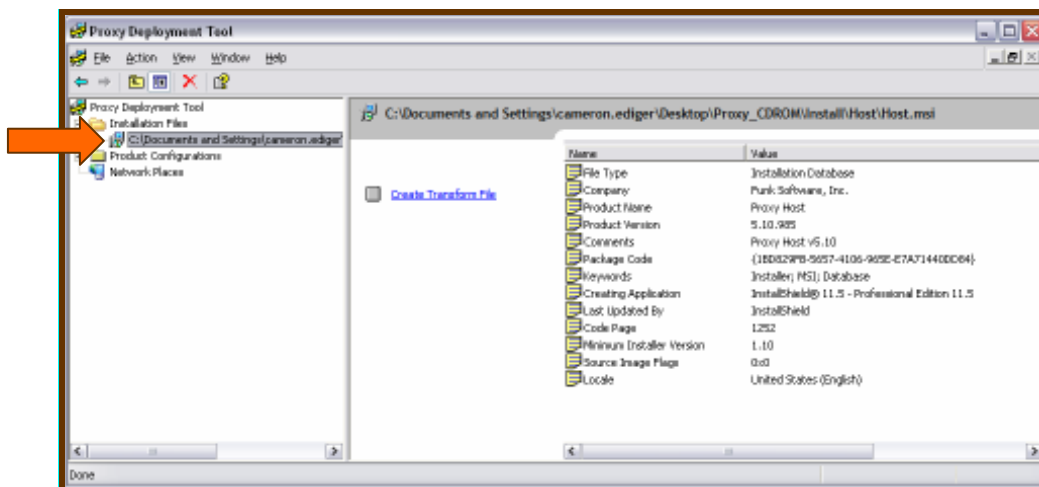
PROXY DEPLOYMENT TOOL SETTINGS

NOTE: The *host.msi* file may need to be copied from the CXM Screen Capture CD to the Screen Capture server before completing the following settings.

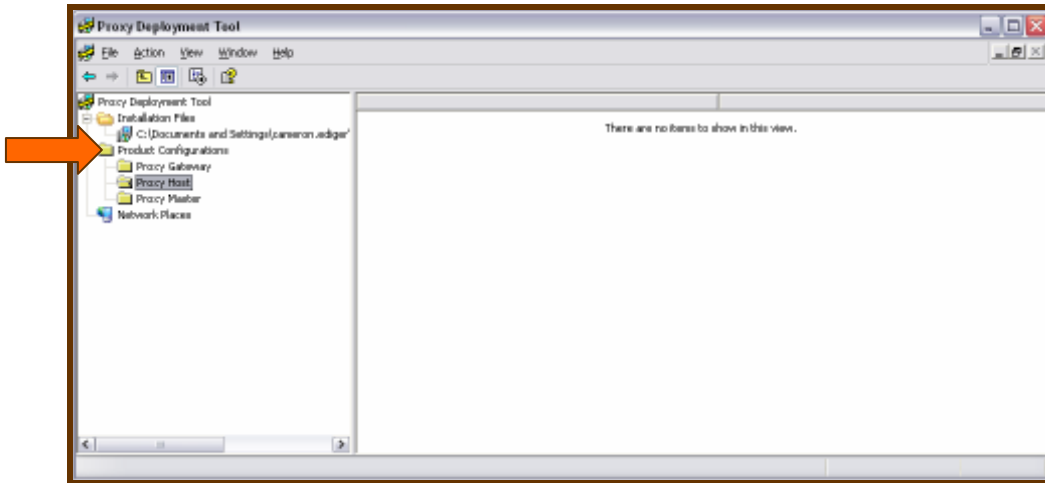
1. Go to Start → Programs → Funk Software → Proxy → Proxy Deployment Tool.



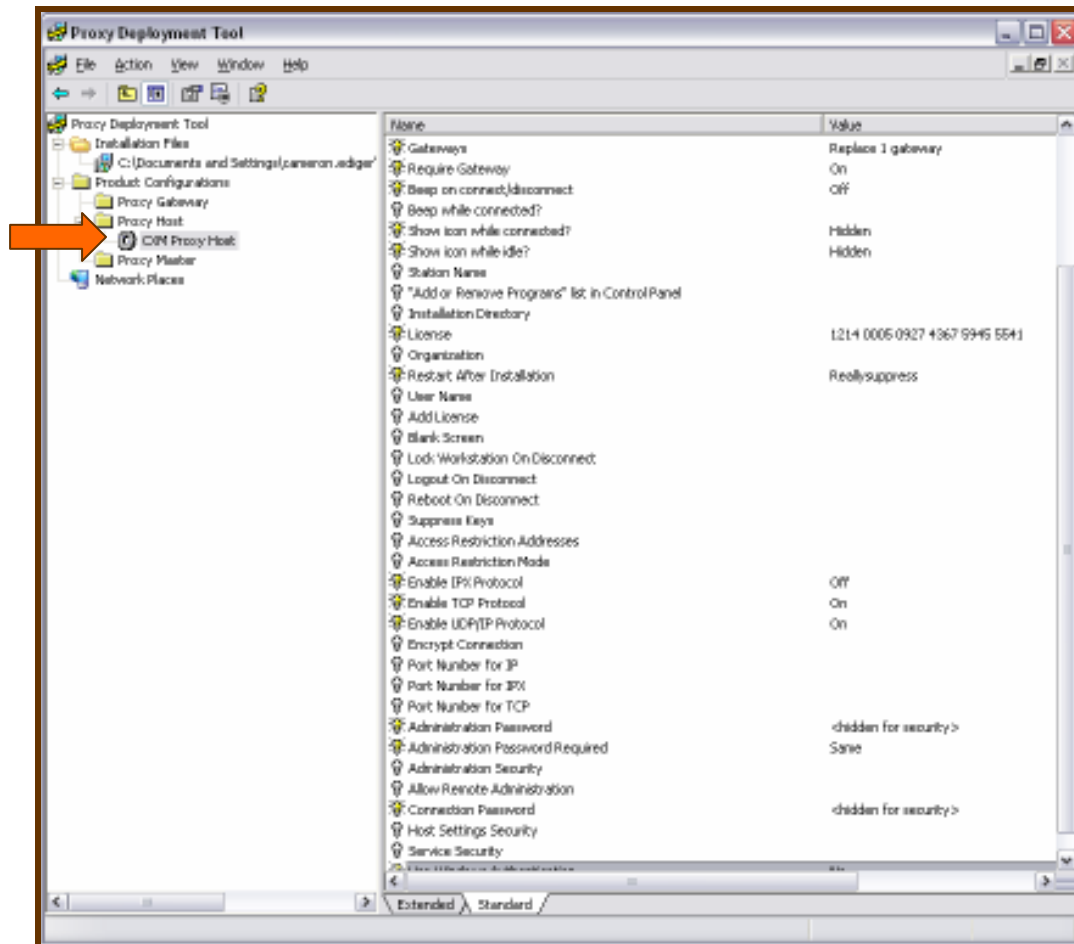
2. Right-click on *Installation Files* and select New → Installation File. A dialog box will appear.
3. Locate and select the *host.msi* file. Click OK. The *host.msi* file will appear under Installation Files (see below).



- Expand *Product Configurations* (see below).



- Right-click on *Proxy Host* and select *New* → *Configuration*. A dialog box will appear.
- Enter "CXM Proxy Host" as the Configuration Name. Click *OK*. The CXM Proxy Host will appear under Proxy Host.

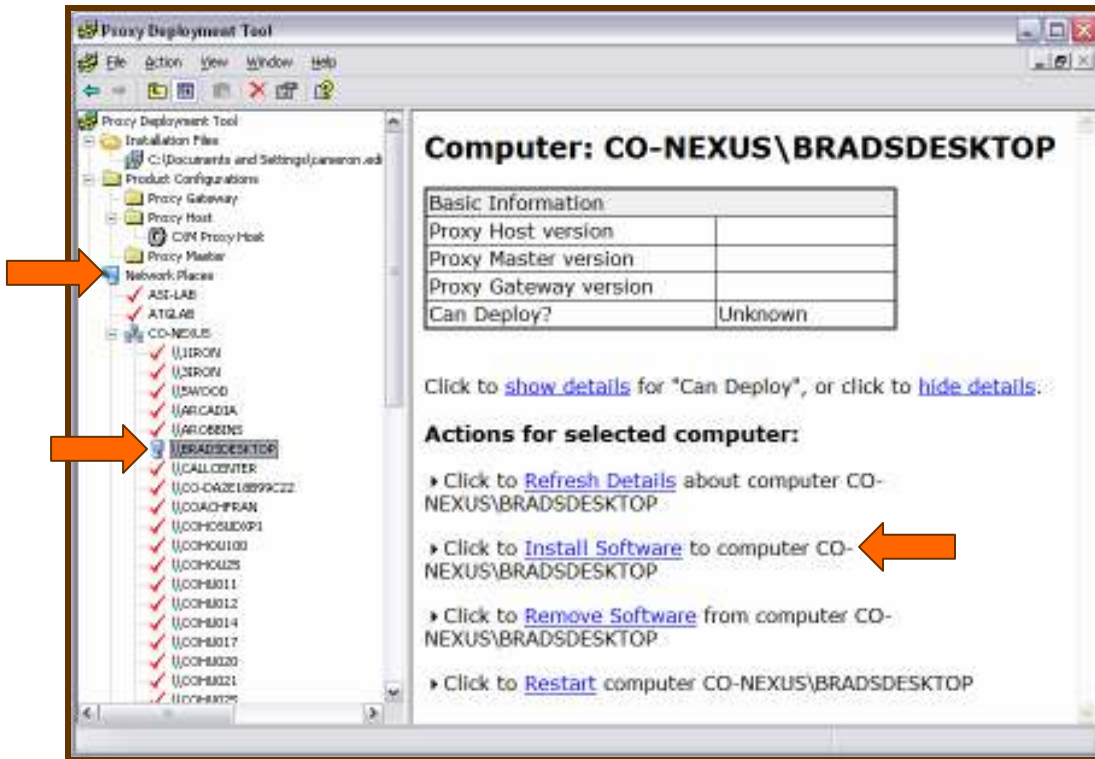


7. Select *CXM Proxy Host*. The configuration settings will appear in the right pane (see above).
8. Set the following values by double-clicking on the name and entering the value in the box that appears:
 - **Gateways** – Add, Protocol: UDP/IP, Address: of the Screen Capture server.
 - **Require Gateway** – On
 - **Beep on connect/disconnect** – Off
 - **Show icon while connected** – Hidden
 - **Show icon while idle** – Hidden
 - **License** – 1214 0005 0927 4367 5945 5541
 - **Restart after installation** – Really suppress
 - **Enable IPX Protocol** – Off
 - **Enable TCP Protocol** – On
 - **Enable UDP/IP Protocol** – On
 - **Administration Password** – Select “Use this value” but leave it blank.
 - **Administration Password Required** – Same
 - **Connection Password** – Select “Use this value” but leave it blank.
 - **Use Windows Authentication** – No

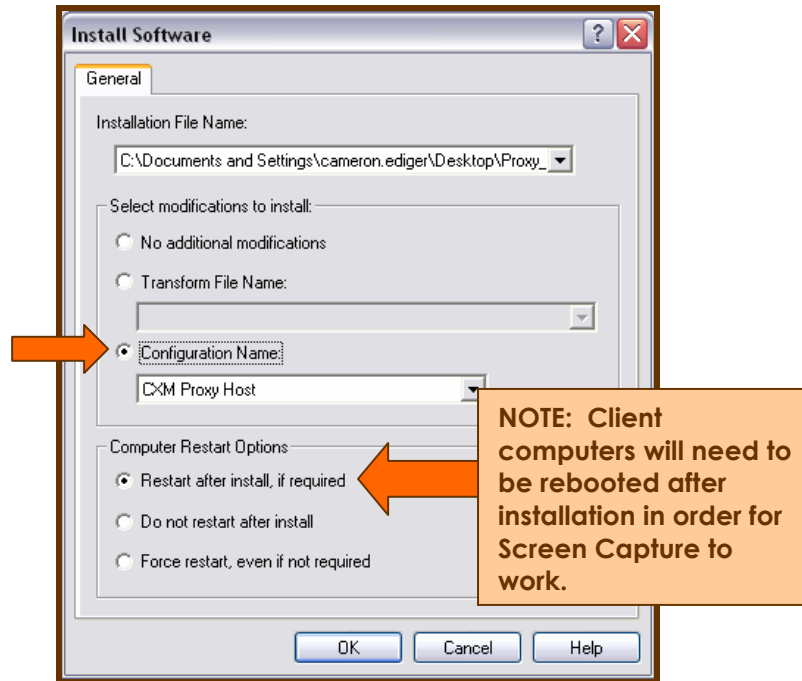
INSTALL PROXY HOST USING THE PROXY DEPLOYMENT TOOL

The Proxy Deployment Tool is used to install the Proxy Host software without visiting each desktop.

1. Go to the CXM® Screen Capture server.
2. Go to Start → Programs → Funk Software → Proxy → Proxy Deployment Tool.



3. Expand *Network Places*.
4. Locate and select the machine on which to install the Proxy Host software. *NOTE: You may need to right-click on the node and click Refresh List to update the list.*
5. On the right side of the window, click *Install Software* (or right-click on the machine name on the left and select *Install Software*). The *Install Software* box will appear:



6. In the *Install Software* box, the Installation file name should already be selected (in the drop-down box). Select *Configuration Name* and the appropriate Configuration file should already be selected (in the drop-down box).
7. Select the Restart option you wish to use. *NOTE: Client computers will need to be rebooted after installation in order for Screen Capture to work.*
8. Click *OK*.
9. A new dialog box will appear. Enter a user name and password that has administrator rights for the machine on which the software is being installed. The software will now be installed.
10. The client computer will need to be rebooted before CXM® Screen Capture will work.

PROXY HOST INSTALL

NOTE: For ghosting client machines, [click here](#) for further information.

The Proxy Host should be installed on all the machines that will be screen recorded using CXM® Screen Capture.

1. Run the Proxy Setup (see [Proxy Setup](#) section for further instructions).
2. Click on the *Install Proxy Host (for x86)* link at the bottom of the Setup page. The following screen will appear:



3. Click *Next*. The *Customer Information* screen will appear:



4. Enter "CXM" in the *User Name* field, and "Co-nexus, Inc." in the *Organization* field.

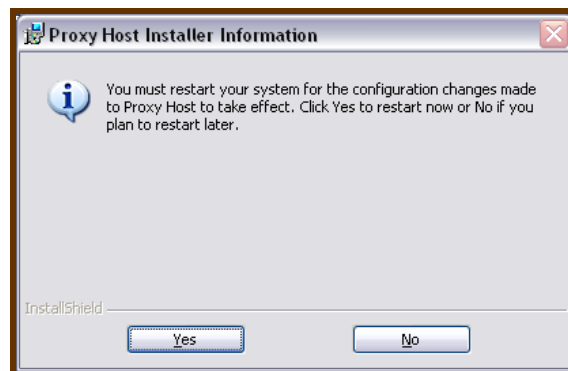
- Click *Next*. The *Custom Setup* screen will appear:



- Click *Next*. The *Product Licensing* screen will appear:



- Enter the following License Key (**1214 0005 0927 4367 5945 5541**) in the *Add License* field and click the *Add License* button. The License will appear in the *Current License Key* list.
- Click *Next*. The Proxy Host will be installed.



9. After the installation is complete, **reboot the machine.**

NOTE REGARDING GHOSTING CLIENT MACHINES...

Preparing the Host and Operating System for Imaging

Proxy Host includes a utility program named `hostprep.exe` to address issues with operating system imaging, the process by which an operating system is installed on one machine and then replicated to other machines. Typically, a third-party utility program, such as Symantec Norton Ghost™ or PowerQuest Drive Image, is used for operating system imaging.

Each Proxy Host installation is identified by a unique identifier. This identifier is used by the Gateway server to identify a Host, even as other information about the Host, such as the machine name, may change. This identifier contains no additional information and has no use other than to allow the Gateway server to identify individual Hosts on the network.

If Proxy Host is installed on an operating system that was imaged, all of the machines will have the same "unique" ID. This causes the Gateway Server to behave as though all machines are the same Host, which makes it impossible for the Gateway Server to effectively manage them. To avoid this problem, you must run the `hostprep` utility to delete the ID before the operating system image is captured.

NOTE: You must prepare the Host software for imaging just before you use the Microsoft-provided SysPrep utility to prepare the operating system.

After the machine is set up and all Host settings are configured, **and immediately before running the Microsoft-provided SysPrep utility**, run the `hostprep.exe` utility from a command prompt. The optional command line argument "-y" can be used to avoid a prompt continue. When HostPrep runs, it stops the Host service and prepares the Host for imaging. It is crucial that the Host service not restart before the operating system image is captured because when the Host starts, it undoes the actions completed by the HostPrep utility.

For more information about operating system imaging, please see:

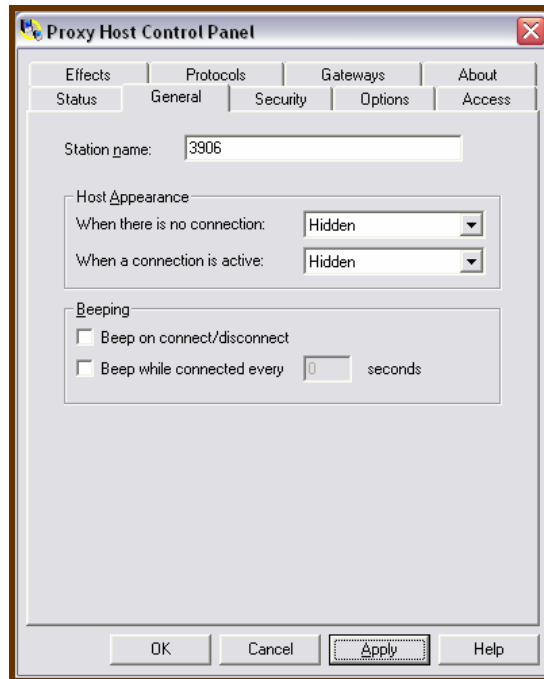
Microsoft TechNet Desktop Deployment Center at

<http://www.microsoft.com/technet/desktopdeployment/>

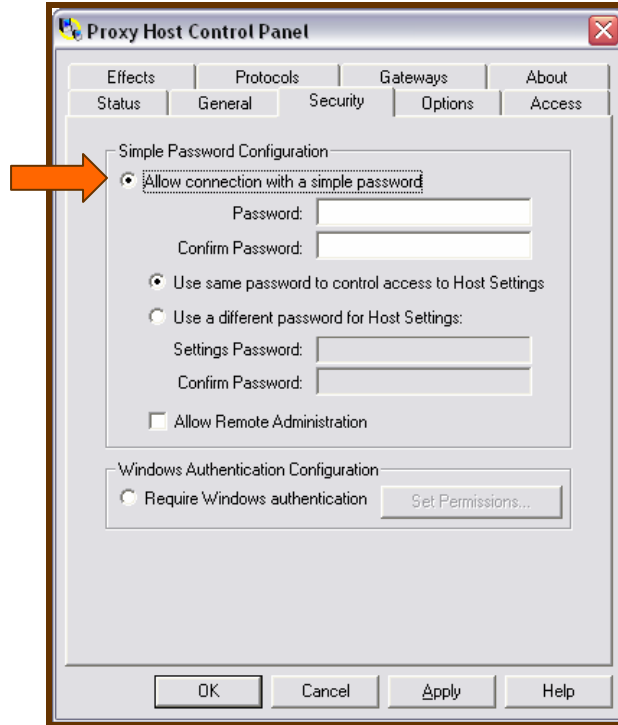
PROXY HOST SETTINGS

NOTE: These settings should only be set after the Host machine has been rebooted.

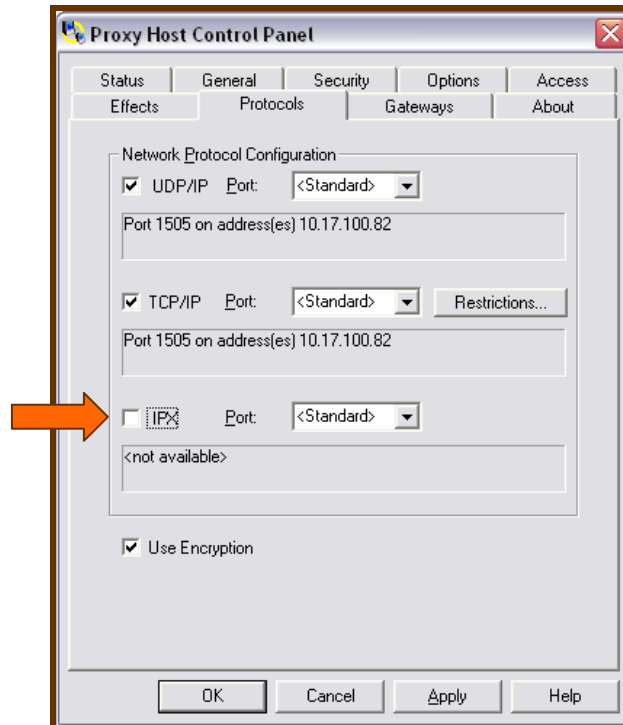
1. Go to Start → Programs → Funk Software → Proxy → Proxy Host Control Panel. The following screen will appear:



2. Under the *General* tab, set the Station Name (usually the Station number). This must match the screen integration under the station settings in the CXM® User Interface.
3. Use the drop-down boxes in the *Host Appearance* section to set both fields to "Hidden".
4. Select the *Security* tab.

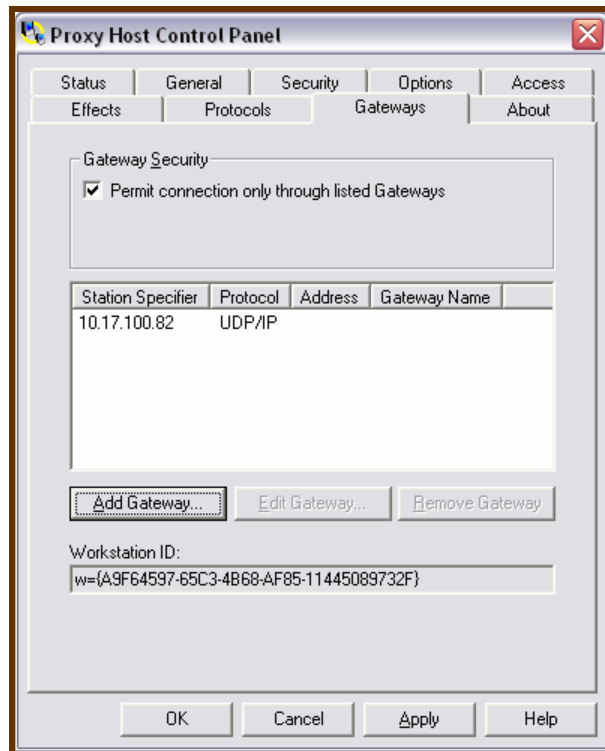


5. Select "Allow connection with a simple password" and leave the password blank.
6. Select the *Protocols* tab.



7. Uncheck the IPX option (see above).

8. Select the *Gateways* tab.



9. Select "Permit connection only through listed Gateways".
10. Click the *Add Gateway* button. A dialog box will appear.
11. Use the drop-down menu to change the protocol to "UDP/IP".
12. Enter the IP Address of the Gateway server (IP Address of the Screen Capture server) in the *Station Specifier* field.
13. Click OK. The server will now appear in the list of Gateways.
14. Click OK to apply the settings and close the Proxy Host Control Panel.

WINDOWS FIREWALL SETTINGS

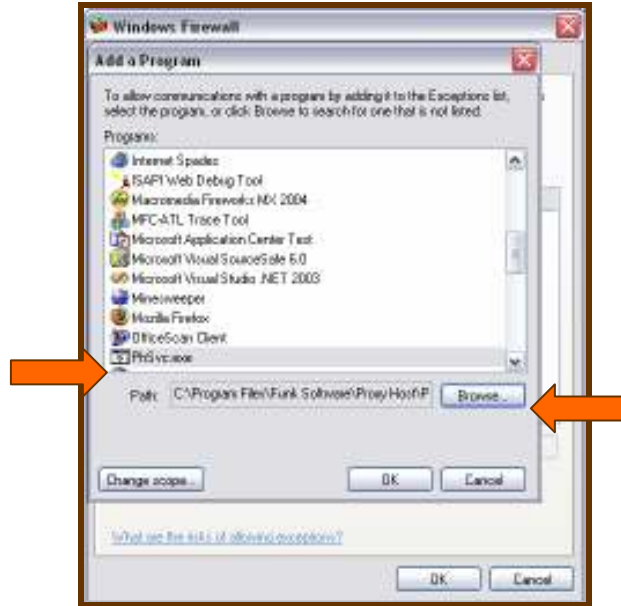
If the Windows Firewall is enabled on the CXM® Screen Capture Server or on the client Host machines, the following exceptions need to be created in the Windows Firewall:

Proxy Host:

1. On the client Host machine go to the Windows Control Panel → Windows Firewall.



2. Under the *Exceptions* tab, click the *Add Program* button. The *Add a Program* screen will appear:



3. Click the *Browse* button.
4. Locate and select the Proxy Host service (default: C:\Program Files\Funk Software\Proxy Host\PhSvc.exe).
5. Click *OK*. The Proxy Host service will appear in the *Programs and Services* list.

Proxy Gateway:

1. On the CXM® Screen Capture server go to the Windows Control Panel → Windows Firewall.
2. Under the *Exceptions* tab, click the *Add Program* button. The *Add a Program* screen will appear.
3. Click the *Browse* button.
4. Locate and select the Proxy Gateway service (default: C:\Program Files\Funk Software\Proxy Gateway\PgSvc.exe).
5. Click *OK*. The Proxy Gateway service will appear in the *Programs and Services* list.

PROXY SDK RUNTIME INSTALL

The Proxy SDK Runtime needs to be installed on the server where the CXM® voice recorder service is installed.

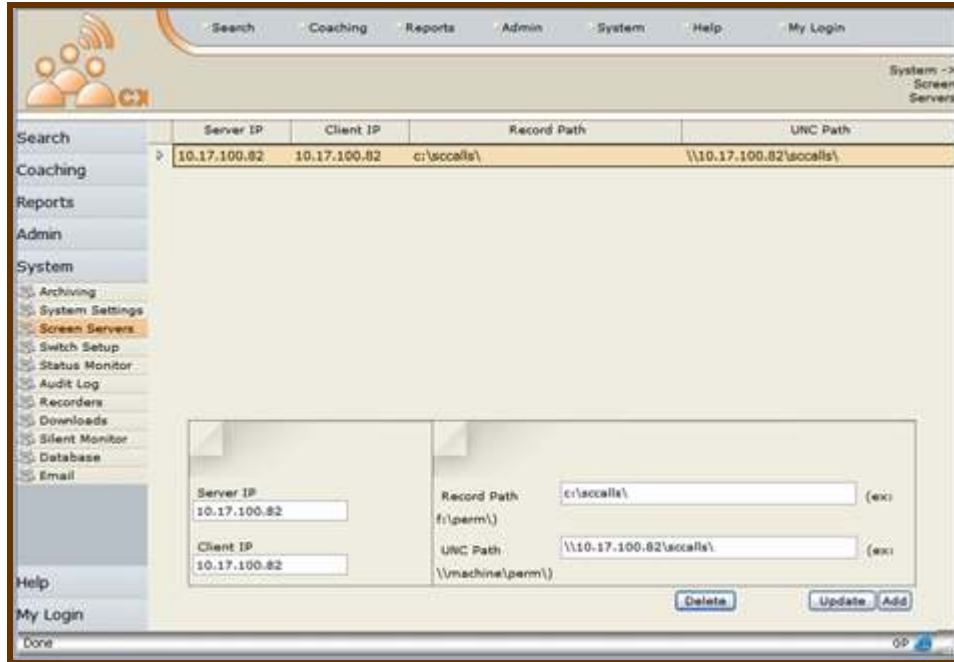
1. Run the ProxySDKRuntime.msi from the CXM Screen Capture CD. The following screen will appear:



2. Select "I accept the terms in the license agreement."
3. Click *Install*. The Proxy SDK Runtime will be installed.

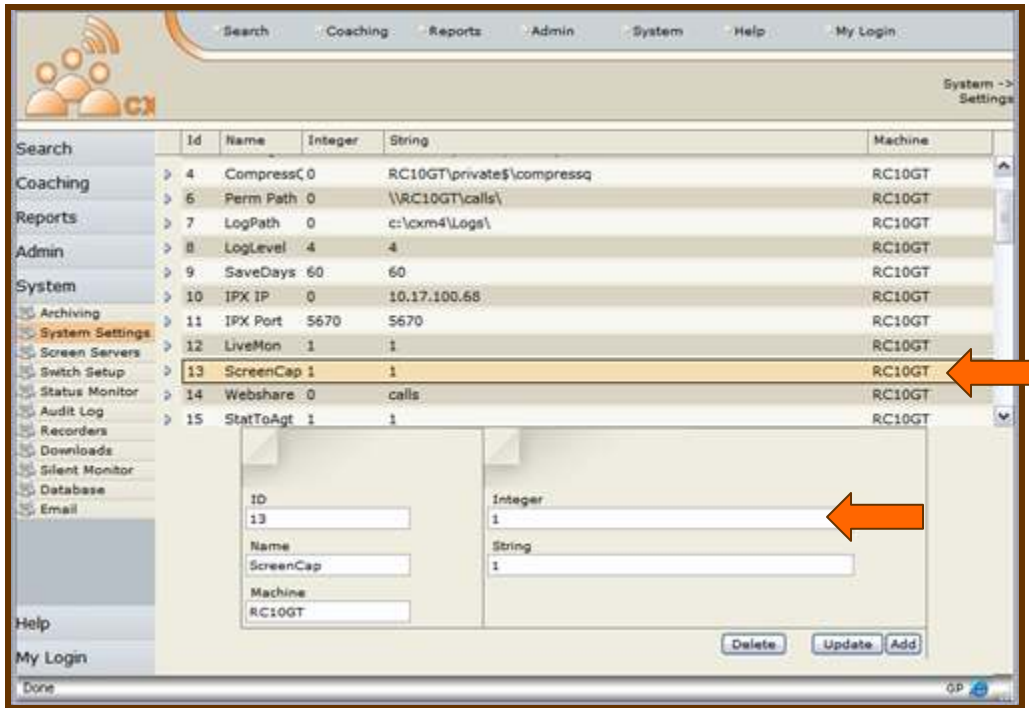
CXM® SETTINGS

1. In the CXM® User Interface, go to System → Screen Servers.

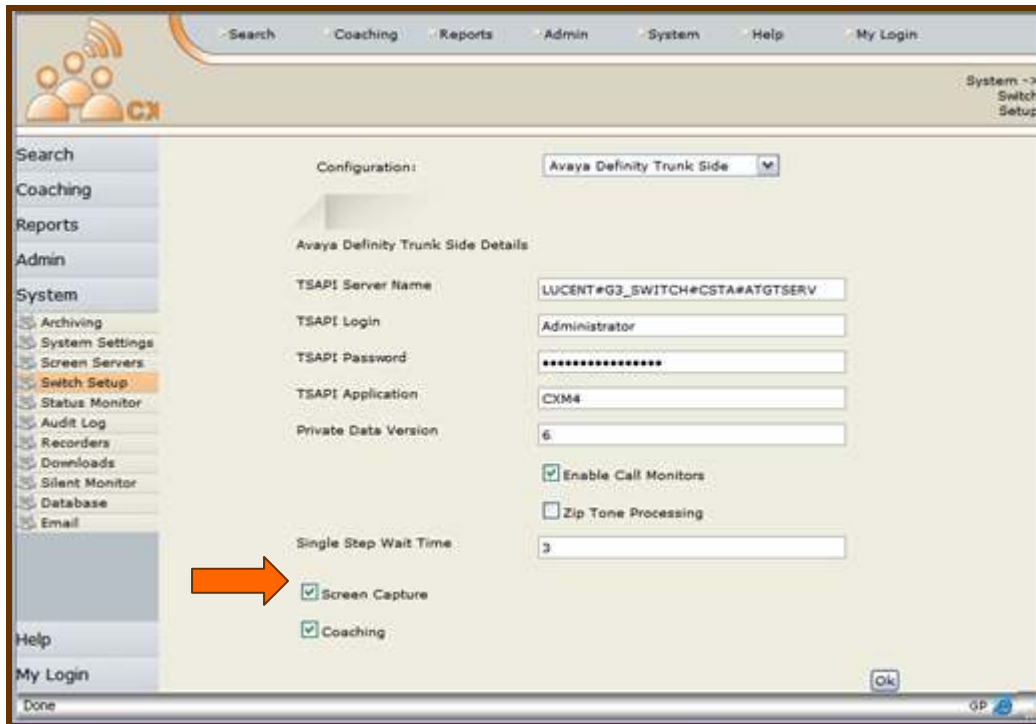


2. Add an entry for **each** CXM® Screen Capture server. At the bottom of the screen, enter the following information into the appropriate fields:
 - **Server IP:** the IP Address used by the recorder to access the CXM® Screen Capture server.
 - **Client IP:** the IP Address used by the Users of CXM® to play back Screen Capture recordings.
 - **Record Path:** the path on the Screen Capture server where the Screen Capture recordings are to be recorded and stored. This can be a UNC path, if needed.
 - **UNC Path:** the UNC on the Screen Capture server where the Screen Capture recordings are to be recorded and stored.
3. Click the *Add* button, located in the lower right corner to add the CXM® Screen Capture server. The server will appear in the list at the top of the screen.

4. Repeat steps 2-3 for **each** Screen Capture server.
5. Go to System → Settings.



6. Click to highlight the row in the list containing Option ID 13. The information about this setting will appear in the fields in the bottom of the screen.
7. In the *Integer* field, change the entry to "1".
8. Click the *Update* button to apply the new setting.
9. Go to System → Switch Setup.



10. Locate and select the Screen Capture option.
11. Click the OK button located in the bottom right corner to apply the new setting.

CXM® MEDIA PLAYER INSTALL

The CXM® Media Player is used to play back screen/voice recordings.

1. To access the CXM® Media Player, go to the CXM® User Interface and go to System → Downloads.
2. Click on the CXM Media Player and the Media Player setup will automatically install the CXM® Media Player.

TROUBLESHOOTING

Host does not show up in Gateway Administrator under Managed Hosts.

- Make sure the Gateway IP address is correct on the Proxy Host.
- In the Gateway Administrator, under General Settings, make sure the “Automatically move newly discovered workstations form Unmanaged Hosts to All Hosts group” is checked.
- Check the Windows Firewall settings.
- Restart the Proxy Host computer.

CXM® Media Player requires password to play Screen Capture files.

- Try to play just the audio file from the CXM® User Interface. If that requires a password also, IIS is not set up correctly. Refer to the CXM® Installation Guide to check IIS setup.
- Check the security settings in the Proxy Gateway Administrator. Verify that the Media Player user permissions are correct.

CXM® Media Player prompts for a valid license key.

- Uninstall CXM® Media Player and reinstall the new MediaPlayer. An old version of the Media Player may be installed. Be sure to get the latest version from CXM.

Recorder gives an error in the log file when trying to connect to a Screen Capture server.

- Verify that the Screen Capture settings are correct in the CXM® User Interface (System → Screen Servers).
- Reinstall the Proxy SDK Runtime.