



## *cxVerify Installation Guide*

---

# Contents

- IBM Tealeaf cxVerify Installation Guide..... 1**
  - IBM Tealeaf cxVerify Installation Guide Overview.....1
    - IBM Tealeaf cxVerify product overview.....1
    - How IBM Tealeaf cxVerify works.....1
    - IBM Tealeaf documentation and help.....1
  - Installing IBM Tealeaf cxVerify .....3
    - Before installing IBM Tealeaf cxVerify .....3
    - Hardware requirements.....4
    - Software requirements.....4
    - IBM Tealeaf cxVerify installation checklist.....4
    - Installing the IBM Tealeaf cxVerify software.....4
    - Configuring permissions.....5
    - Installing IBM Tealeaf CX RealTea Viewer.....5
    - Restarting the IBM Tealeaf Management Server.....5
    - Creating the IBM Tealeaf cxVerify server.....5
    - Adding an IBM Tealeaf cxVerify server.....5
    - Running the test extract.....6
  - Upgrading IBM Tealeaf cxVerify .....6
    - Upgrading from release 6.x or earlier.....6
    - Upgrading from release 7.x or later.....7
- Index..... 8**

# IBM Tealeaf cxVerify Installation Guide

---

The IBM® Tealeaf® cxVerify Installation guide provides information on the initial installation, configuration, testing, and upgrading the software from a previously supported version.

## IBM Tealeaf cxVerify Installation Guide Overview

---

The IBM Tealeaf cxVerify Installation guide provides information on the initial installation or upgrade of the software from a previously supported version.

### IBM Tealeaf cxVerify product overview

IBM Tealeaf cxVerify is a Windows service that runs on the IBM Tealeaf CX server.

Typically, it runs on a separate server from the primary IBM Tealeaf CX server, but it can be installed on the primary server if needed. You can run only one IBM Tealeaf cxVerify server at any time.

IBM Tealeaf cxVerify consists of the following components:

- User interface
- Service that schedules and extracts selected customer session data
- Viewer that enables business users to replay and review customer sessions

The batch-load extraction service can run as a scheduled process or when needed.

cxVerify uses an Extraction API to extract the archived session data. In a single-machine environment, data is extracted from the Long-Term Canister.

### How IBM Tealeaf cxVerify works

IBM Tealeaf cxVerify system runs the following tasks.

#### Procedure

1. Queries the IBM Tealeaf CX Server to return a list of matching sessions.
2. Queries the IBM Tealeaf CX Server to return the XML session document for each matching session.
3. Parses the returned XML and extracts name-value data such as **URL** field name and **URL** field value.
4. Packages the customer session data into a replayable file format.
5. Wraps the replayable session file into a PDF file, with selected metadata.
6. Writes the PDF file with the embedded session to a pre-defined directory, where it can be archived or managed by your existing systems.

### IBM Tealeaf documentation and help

IBM Tealeaf provides documentation and help for users, developers, and administrators.

#### Viewing product documentation

All IBM Tealeaf product documentation is available at the following website:

[Tealeaf Customer Experience Support](#)

Use the information in the following table to view the product documentation for IBM Tealeaf:

<i>Table 1. Getting help</i>	
<b>To view...</b>	<b>Do this...</b>
Product documentation	On the IBM Tealeaf portal, go to ? > <b>Product Documentation</b> .
IBM Tealeaf Knowledge Center	On the IBM Tealeaf portal, go to ? > <b>Product Documentation</b> and select <i>IBM Tealeaf Customer Experience in the ExperienceOne Knowledge Center</i> .
Help for a page on the IBM Tealeaf Portal	On the IBM Tealeaf portal, go to ? > <b>Help for This Page</b> .
Help for IBM Tealeaf CX PCA	On the IBM Tealeaf CX PCA web interface, select <b>Guide</b> to access the <i>IBM Tealeaf CX PCA Manual</i> .

### Available documents for IBM Tealeaf products

The following table is a list of available documents for all IBM Tealeaf products:

<i>Table 2. Available documentation for IBM Tealeaf products</i>	
<b>IBM Tealeaf products</b>	<b>Available documents</b>
IBM Tealeaf CX	<ul style="list-style-type: none"> <li>• <i>IBM Tealeaf Customer Experience Overview Guide</i></li> <li>• <i>IBM Tealeaf CX Client Framework Data Integration Guide</i></li> <li>• <i>IBM Tealeaf CX Configuration Manual</i></li> <li>• <i>IBM Tealeaf CX Cookie Injector Manual</i></li> <li>• <i>IBM Tealeaf CX Databases Guide</i></li> <li>• <i>IBM Tealeaf CX Event Manager Manual</i></li> <li>• <i>IBM Tealeaf CX Glossary</i></li> <li>• <i>IBM Tealeaf CX Installation Manual</i></li> <li>• <i>IBM Tealeaf CX PCA Manual</i></li> <li>• <i>IBM Tealeaf CX PCA Release Notes</i></li> </ul>
IBM Tealeaf CX	<ul style="list-style-type: none"> <li>• <i>IBM Tealeaf CX RealTime Viewer Client Side Capture Manual</i></li> <li>• <i>IBM Tealeaf CX RealTime Viewer User Manual</i></li> <li>• <i>IBM Tealeaf CX Release Notes</i></li> <li>• <i>IBM Tealeaf CX Release Upgrade Manual</i></li> <li>• <i>IBM Tealeaf CX Support Troubleshooting FAQ</i></li> <li>• <i>IBM Tealeaf CX Troubleshooting Guide</i></li> <li>• <i>IBM Tealeaf CX UI Capture j2 Guide</i></li> <li>• <i>IBM Tealeaf CX UI Capture j2 Release Notes</i></li> </ul>
IBM Tealeaf cxImpact	<ul style="list-style-type: none"> <li>• <i>IBM Tealeaf cxImpact Administration Manual</i></li> <li>• <i>IBM Tealeaf cxImpact User Manual</i></li> <li>• <i>IBM Tealeaf cxImpact Reporting Guide</i></li> </ul>

Table 2. Available documentation for IBM Tealeaf products (continued)

IBM Tealeaf products	Available documents
IBM Tealeaf cxConnect	<ul style="list-style-type: none"> <li>• <i>IBM Tealeaf cxConnect for Data Analysis Administration Manual</i></li> <li>• <i>IBM Tealeaf cxConnect for Voice of Customer Administration Manual</i></li> <li>• <i>IBM Tealeaf cxConnect for Web Analytics Administration Manual</i></li> </ul>
IBM Tealeaf cxOverstat	<i>IBM Tealeaf cxOverstat User Manual</i>
IBM Tealeaf cxReveal	<ul style="list-style-type: none"> <li>• <i>IBM Tealeaf cxReveal Administration Manual</i></li> <li>• <i>IBM Tealeaf cxReveal API Guide</i></li> <li>• <i>IBM Tealeaf cxReveal User Manual</i></li> </ul>
IBM Tealeaf cxVerify	<ul style="list-style-type: none"> <li>• <i>IBM Tealeaf cxVerify Installation Guide</i></li> <li>• <i>IBM Tealeaf cxVerify User's Guide</i></li> </ul>
IBM Tealeaf cxView	<i>IBM Tealeaf cxView User's Guide</i>
IBM Tealeaf CX Mobile	<ul style="list-style-type: none"> <li>• <i>IBM Tealeaf CX Mobile Android Logging Framework Guide</i></li> <li>• <i>IBM Tealeaf Android Logging Framework Release Notes</i></li> <li>• <i>IBM Tealeaf CX Mobile Administration Manual</i></li> <li>• <i>IBM Tealeaf CX Mobile User Manual</i></li> <li>• <i>IBM Tealeaf CX Mobile iOS Logging Framework Guide</i></li> <li>• <i>IBM Tealeaf iOS Logging Framework Release Notes</i></li> </ul>

## Installing IBM Tealeaf cxVerify

As you prepare for an installation, you need to gather some items, review hardware and software requirements, and then you can perform the installation. The installation checklist provides a high level view of the installation, detailed procedures are provided to support the installation checklist.

### Before installing IBM Tealeaf cxVerify

Before you install IBM Tealeaf cxVerify, you need to gather the software needed for the installation.

Before you begin the installation, review this list of items:

- You need access to a server to do the software installation.
- You need to obtain the most recent copy of the cxVerify software.
- If you plan to export sessions with PDFs:
  - Check and see if the IBM Tealeaf has been installed. If not, you will need to obtain the IBM Tealeaf CX RealTime Viewer software required for an installation.
  - You will need to obtain and install a copy of Adobe Acrobat Reader. You can get a free copy of Adobe Acrobat Reader at [.](#)
- You need copies of the following documents:

- IBM Tealeaf RealiTea Viewer User Manual
- IBM Tealeaf cxImpact Administration Manual
- IBM Tealeaf cxImpact User Manual

## Hardware requirements

The IBM Tealeaf cxVerify server has some hardware requirements.

The cxVerifyserver must meet the following minimum requirements:

- Dual 1.8 GHz Pentium processors
- 2 GB RAM
- Disk space that is based on the amount of data being extracted
- Disk spaced that is based on your retention policy

## Software requirements

In general, do not install IBM Tealeaf cxVerify on a server where other resource- intensive applications are installed.

The cxVerify can be co-located on a server with IBM Tealeaf cxConnect for Data Analysis.

If you have to install cxVerify on the same server as Microsoft SQL, the solution to make this work is to raise the setting that controls the desktop heap for each desktop associated with an on-interactive window. For more information see <http://support.microsoft.com/kb/824422>.

## IBM Tealeaf cxVerify installation checklist

The cxVerify installation checklist provides a checklist to use during installation.

Use this checklist when installing cxVerify:

<i>Table 3. cxVerify Installation Checklist</i>	
<b>Step</b>	<b>Task Description</b>
1	Install IBM Tealeaf cxVerify.
2	Configure permissions.
3	Install CX RealiTea Viewer.
4	Restart the IBM Tealeaf Management Server.
5	Create the IBM Tealeaf cxVerify Server.
6	Adding an cxVerify IBM Tealeaf Server.
7	Run a test extract. This step is optional.

The installation is complete after completing all of the steps in this checklist. If the task requires more information, see the topic for more information.

## Installing the IBM Tealeaf cxVerify software

In this step, you install the cxVerify software.

Run the IBM Tealeaf cxVerify installer, `setup.exe`, on the target server.

During the installation, you select the IBM Tealeaf cxVerify components to add. The `cxVerify Service` extracts the session data from IBM Tealeaf Canister and exports the session data to a variable archive or PDF.

The installer:

- Adds the IBM Tealeaf cxVerify menu item to the IBM Tealeaf menu

- Adds the IBM Tealeaf Extractor Service to Windows services

## Configuring permissions

In this step, you configure the cxVerify permissions.

If you installed this product as part of a new installation of IBM Tealeaf, access to product features through the Portal are provided to the ADMIN group automatically.

Automatic access is also granted if you license this product for an existing IBM Tealeaf solution and do not modify your ADMIN group permissions.

- If you modify the ADMIN group and are deploying this product to an existing IBM Tealeaf solution, you must update menu permissions manually for that group.
- For all other users and groups, you must configure the appropriate permissions.
- See "CX User Administration" in the *IBM Tealeaf cxImpact Administration Manual*.

## Installing IBM Tealeaf CX RealTea Viewer

This installation step is only required if you use IBM Tealeaf cxVerify to export sessions as PDF files that include images.

Install IBM Tealeaf CX RealTea Viewer on the IBM Tealeaf cxVerify server.

For more information, see the *IBM Tealeaf RealTea Viewer User Manual*.

## Restarting the IBM Tealeaf Management Server

If you are installing IBM Tealeaf cxVerify on a pre-existing server, such as the IBM Tealeaf Portal Server, then you must restart the IBM Tealeaf Management Server.

For more information, see the *IBM Tealeaf cxImpact Administration Manual*.

## Creating the IBM Tealeaf cxVerify server

In this installation step, you enable communications between the IBM Tealeaf Portal and IBM Tealeaf cxVerify, and you create an instance of the IBM Tealeaf cxVerify Server in the **Portal Management** page.

For more information, see the *IBM Tealeaf cxImpact Administration Manual*.

## Adding an IBM Tealeaf cxVerify server

In this installation step, you add the IBM Tealeaf cxVerify server.

### About this task

Session File Export requires a IBM Tealeaf cxVerify Server to manage extraction and data output.

### Procedure

1. Log in to the IBM Tealeaf Portal as an administrator.
2. From the **Portal** menu, select **Tealeaf > Portal Management**.

The **Portal Management** page opens.

3. In the left navigation pane, click **Tealeaf Servers**.
4. Click the **Manage Servers** link. The list of currently available servers is displayed.

The list of currently available servers is displayed.

5. If an IBM Tealeaf cxVerify server does not exist, click **New** and select **IBM Tealeaf cxVerify Server** from the menu.
  - If a IBM Tealeaf cxVerify server exists, select it and click **Edit**.
6. Edit the IBM Tealeaf cxVerify Server properties.
  - a) Click the **Active** check box.

b) Enter the **Display Name** for the server.

The default value is cxVerify Server.

c) From the list, select the server that is hosting the IBM Tealeaf cxVerify Server.

d) Enter the port number to use.

The default value is 19000.

e) Click **Save**.

## Results

The server is added to the list.

## Running the test extract

Before you configure large extract jobs that involve a high number of sessions, configure a test extract of no more than three sessions. This step is optional.

### Procedure

1. Configure a search that returns only three sessions. Copy the search string from the **Session List** page.  
For more information, see the *IBM Tealeaf cxImpact User Manual*.
2. Configure a IBM Tealeaf cxVerify task that uses this search string to retrieve the sessions. The search string can be pasted into the configuration.
3. Run the task and verify the results.

## Upgrading IBM Tealeaf cxVerify

---

If it is time to upgrade your IBM Tealeaf cxVerify installation to a new release, you will need to use the upgrade instructions.

### Upgrading from release 6.x or earlier

You are upgrading your IBM Tealeaf cxVerify installation from Release 6.x or earlier to this version.

#### About this task

If you are upgrading IBM Tealeaf cxVerify from Release 6.x or earlier, more steps are required.

#### Procedure

1. Before you upgrade, you must acquire your IBM Tealeaf cxVerify job definitions file from your current installation.

This file is in the following location:

```
<Tealeaf_install_directory>\DataExtractor\JobListCfg.xml
```

2. Save this file into a location outside of the IBM Tealeaf installation directory.
3. Uninstall all IBM Tealeaf cxVerify software.
  - a) Log in to the server where IBM Tealeaf cxVerify is installed.
  - b) From the Windows **Start** menu, open the Control Panel.
  - c) Select **Add/Remove Programs**.
  - d) Uninstall IBM Tealeaf cxVerify from the Add/Remove Programs control panel.
4. If you are upgrading IBM Tealeaf cxImpact at the same time, upgrade IBM Tealeaf cxImpact.



For more information, see the *IBM Tealeaf CX Upgrade Manual*.

5. Verify that IBM Tealeaf cxImpact is properly functioning.
6. Reinstall IBM Tealeaf cxVerify from the software distribution from which you upgraded IBM Tealeaf cxImpact.
7. Verify that IBM Tealeaf cxVerify is accessible from the IBM Tealeaf Portal.
8. Re-create your IBM Tealeaf cxVerify jobs.

Use the job specifications in `JobListCfg.xml` as your source content.

**Note:** Do not overwrite `JobsListCfg.xml` into the new installation. The format changed in this release, and the file does not work.

9. Verify that your IBM Tealeaf cxVerify jobs are working properly in the upgraded Portal.

## Upgrading from release 7.x or later

You are upgrading your IBM Tealeaf cxVerify installation from Release 7.x or later to this version.

If you are upgrading IBM Tealeaf cxVerify from Release 7.x or later, run the IBM Tealeaf CX Upgrader provided with the software installation on the server that hosts IBM Tealeaf cxVerify.

For more information, see the *IBM Tealeaf CX Upgrade Manual*.

---

# Index

## C

cxVerify [1](#), [3](#), [4](#)

## I

installation [1](#), [3](#), [4](#)

## O

overview [1](#)

## S

software requirements [4](#)

system requirements [4](#)



