Mida Deployment Guide

Mida Teams Compliance Recorder

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Email: info@midasolutions.com
www.midasolutions.com
linkedin.com/company/midasolutions

via San Crispino, 46
35129 - Padua
Italy

Document Information

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1.0	01/09/2021	Initial version		1.0
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1. Introduction

1.1 Legal Statements

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1.2 Preface

This document is part of the official documentation of Mida Solutions products and details functionalities, user interface, option and working modes in detail. The system allows the user to configure all system functions using a simple and intuitive WEB interface. Please refer to the reference table for a complete list of documents relevant for system configuration.

1.3 Audience

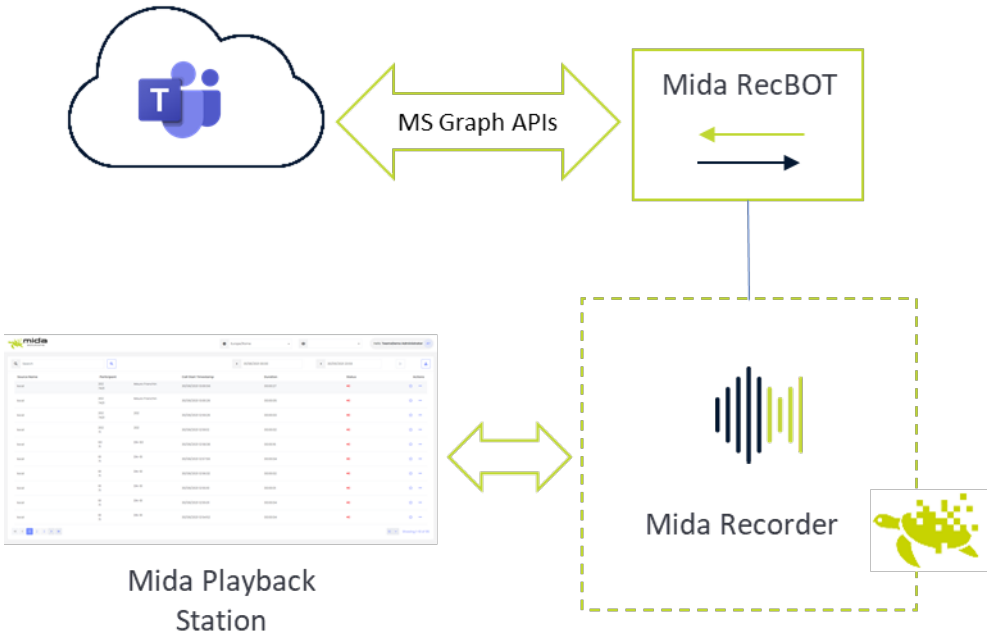
The present document addresses both end users and system administrators of the products.

1.4 Notations

This document highlights, where possible, the main parameters and operations through **bold** or *italics* text and all parts that might be critical during system configuration or use. Critical parts are also marked with Warning symbol reported here on the left.

BEFORE YOU START

Before starting with the configuration, we would like you to acknowledge how Mida Teams Compliance Recorder works. Basically, recordings are made by a bot (hereafter Mida RecBOT) and then call audio files and metadata are made available in Mida Playback station, from where you can search and listen to the recordings.



HOW DOES MIDA RECORDER FOR MS TEAM WORK?

Mida RecBOT uses the Microsoft Graph APIs to connect to MS Teams and receive full information about the calls that are made/received by MS Teams users (both Teams to Teams, Teams to PSTN, PSTN to Teams). In the configuration phase, you can set whether it records all users' calls or just some.

Recorded calls are sent to the server where you have installed an executable file (hereafter called MidaRec.exe).
Mida RecBOT must run as a service in a Windows Virtual Machine and acts as a Gateway in the general Mida Recorder architecture. Collected calls are temporarily kept in the RecBOT's storage until they are transferred to a Mida Recorder Archiver, where they will be managed and made available to the authorized users.

Following our instructions below, you must configure a collector within Mida Unified Portal (MUP), allowing the collector to access and copy all the recorded files from the MidaRec.exe folder.
You can set your preferred backup frequency.

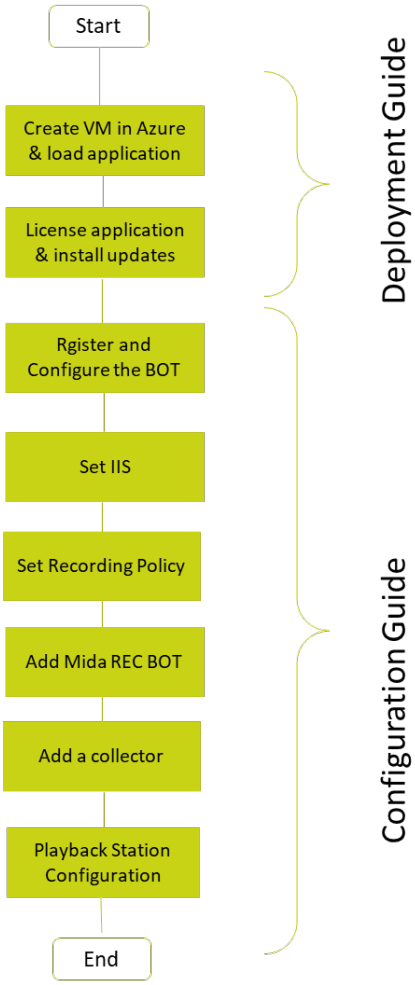
1.5 Operations Flow

The flow chart represented below gives a step-by-step view of the actions required in order to completely set up Mida Teams Compliance Recorder. This guide covers the initial part of the deployment, including the following logical steps:

- Creation of the VM in MS Azure
- Deployment of the Recorder image onto the VM
- Licensing of Recorder
- Installation of any required application update (may not be required)

The second part, that covers the full configuration of the application, is detailed in another manual (see Mida Teams Compliance Recorder – Configuration Guide - Azure).

This Guide is intended to help you deploy Mida Solutions' applications. Please be aware that in order to use Mida's products you should also complete the instructions included in the Configuration Guide of the product you purchased.



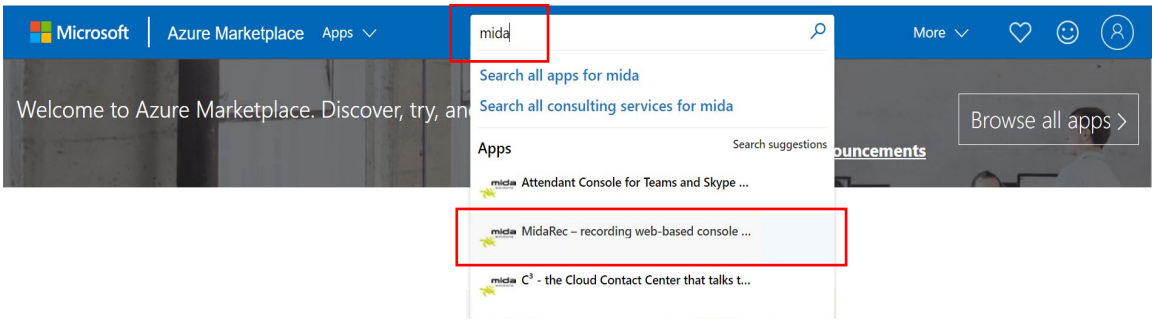
2. Deploying Mida Recorder via Azure Marketplace

Deploying Mida Recorder via Azure Marketplace is very simple as it comes almost entirely pre-configured.

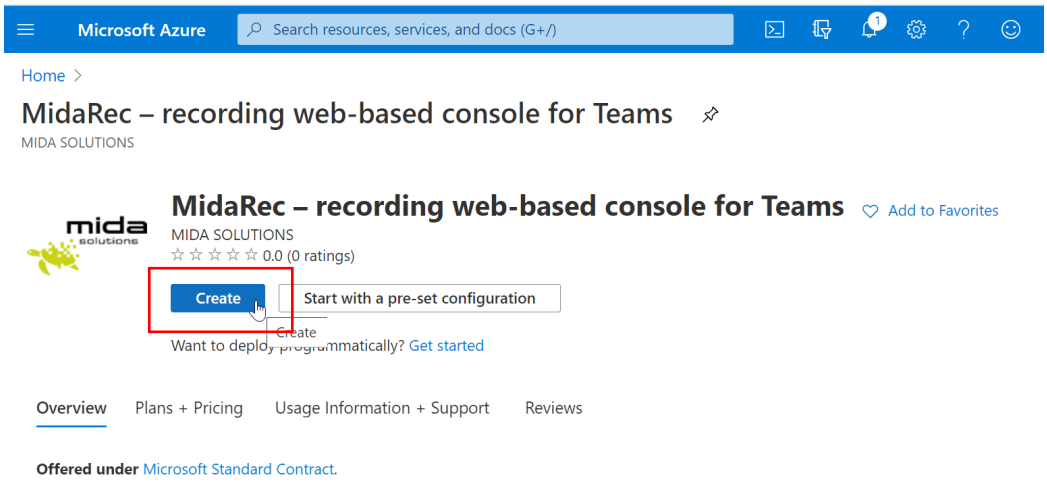
Follow the next steps to complete the deployment successfully.

2.1 Azure Marketplace

1. Access the Azure Marketplace;
2. In the menu on the top, search for ***Mida Recorder***



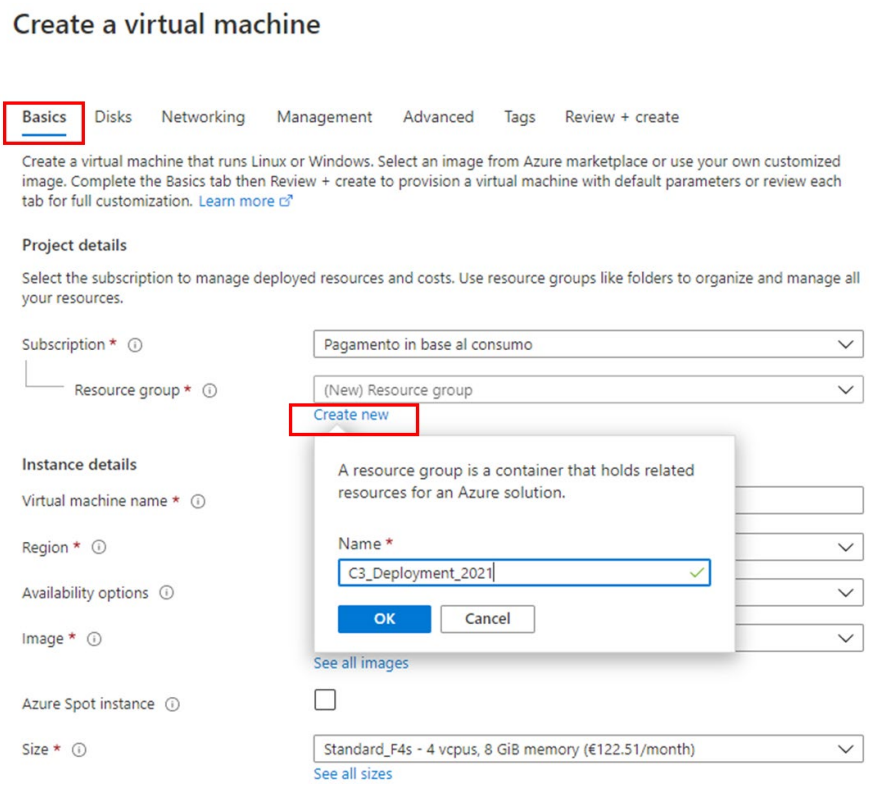
3. Click on ***MidaRec – recording web-based console for Teams,***
4. Click on **Get it now** and then on continue clicking on ***Create***.



The procedure will guide you through the steps required to create your virtual machine in Microsoft Azure and install Mida Recorder. The display will show a window with a number of tabs: each tab is a step forward in the deployment process, as detailed in the next Sections.

Note: the whole procedure assumes you have the possibility to create a Virtual Machine in Microsoft Azure: this usually requires some form of contract to be signed with Microsoft.

2.2 Basic



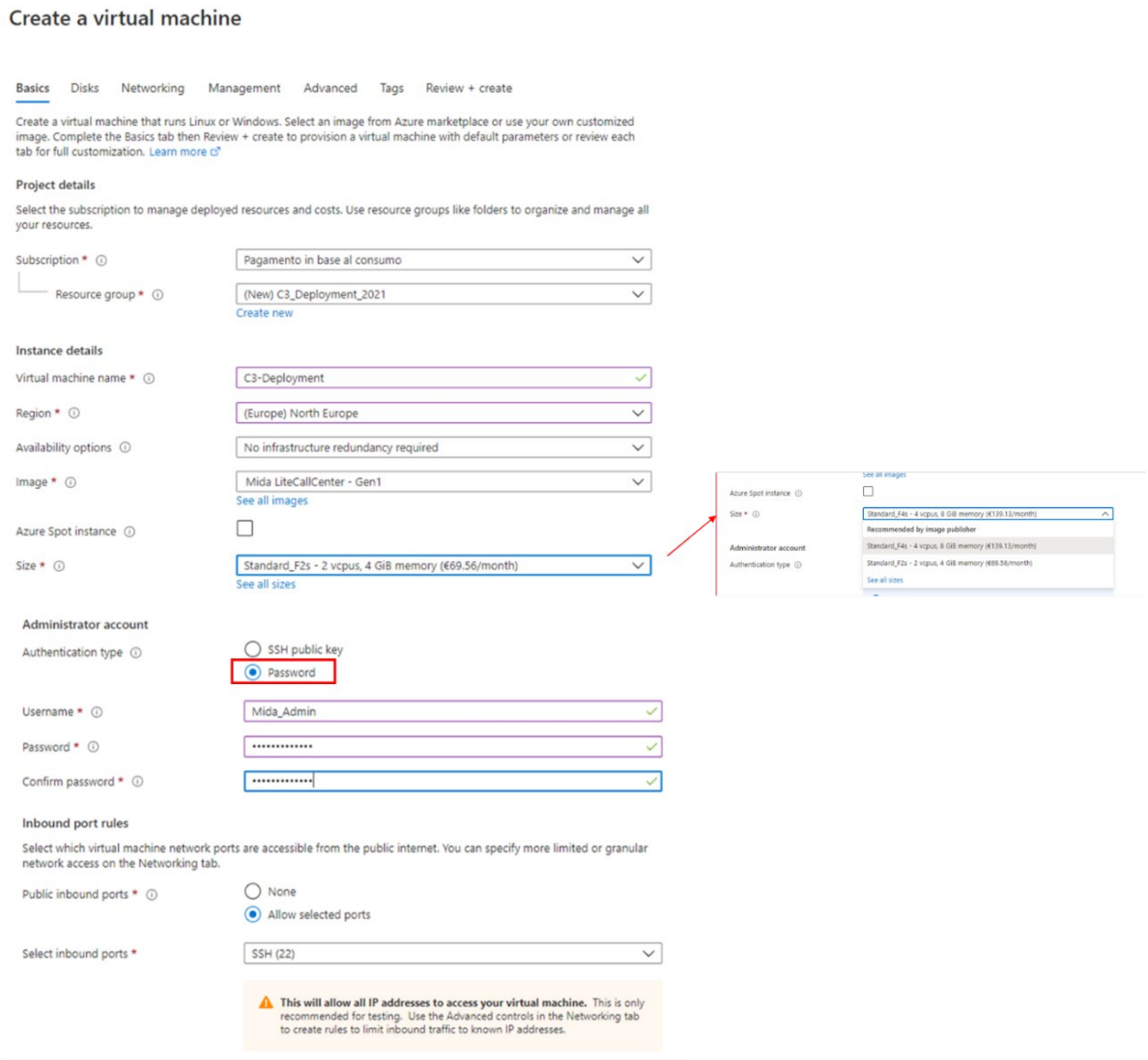
In the ***Basic*** tab, configure the fields as:

a. ***Resource group***: select the desired resource group or create a new group (as in the figure below);
b. ***Virtual machine name***: insert you preferred name (in the figure below "*C^3-Deployment")*;
c. ***Region***: select your Country area
d. ***Size***: this field should be automatically set to the minimum required size for the Mida Recorder to work. The table below gives further information about the VM specifications based on the requirements of the contact center in terms of agents and channels. In case of doubts, please contact support@midasolutions.com to verify the best size for your needs.

VM configuration	Max number of simultaneously logged agents + supervisors	Max number of channels
F2S (2vCPU, 4GB RAM, 160GB vHDD)	200	150
F4S (4vCPU, 8GB RAM, 320GB vHDD)	400	300
F8S (8vCPU, 16GB RAM, 640GB vHDD)	800	600

e. ***Authentication type***: select ***Password*** and insert the desired credentials.

Leave the other field as by default.



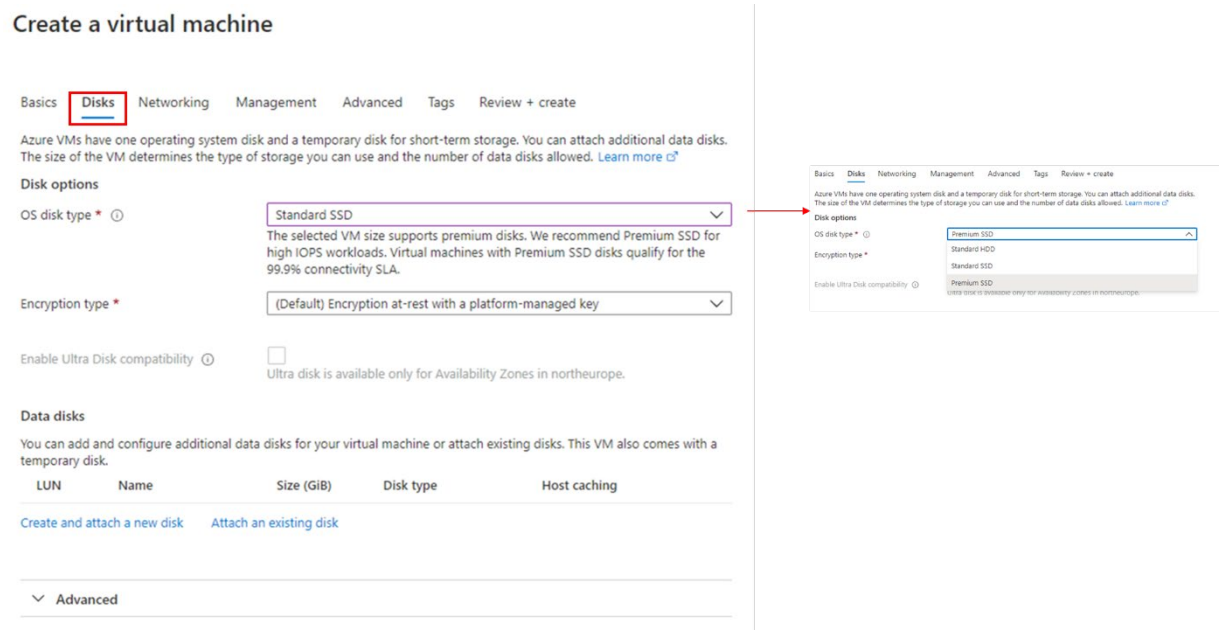
2.3 Disks

1. Proceed clicking on ***Next: Disks*** and select the desired ***OS disk type***. No other settings are required.

Note: this step creates a minimal disk that is good enough for PoC or trial purposes, but would not be sufficient for a fully operational system. The table below provides the guidelines for sizing the disk based on the number of channels and users. Please refer to your Mida Solutions reference person if you have any doubt in its interpretation or if your requirements are not included.

VM configuration	Max number of simultaneously logged agents + supervisors	Max number of channels
2vCPU, 4GB RAM, 160GB vHDD	200	150
4vCPU, 8GB RAM, 320GB vHDD	400	300
8vCPU, 16GB RAM, 640GB vHDD	800	600

For deploy Mida Recorder, the disk size should be selected based on the traffic volume and on retention period. As a rule of thumb, 1 Erlang of traffic under an average usage (8 busy hours/day) requires about 8 Gbyte of storage every month (30 days). You may try to use this rule in order to size the additional disk required by the recorder, but it's strongly suggested that you consult your Mida Solutions reference person to get advice.



In order to compute the required disk size, follow these steps:

- Determine the peak hour Erlang rate **E** of your network. This value is used to license the recorder, so it should be available from the license itself or by contacting your Mida Solutions representative
- Determine the number of busy hours per day **BH** for your network. This is the number of hours where you expect to have traffic to be recorded in a day
- Determine the retention period **RP**, in days, for the recorded calls, i.e. how long such calls must be kept in the Recorder's storage
- Compute the required storage (in GB) using the following formula:

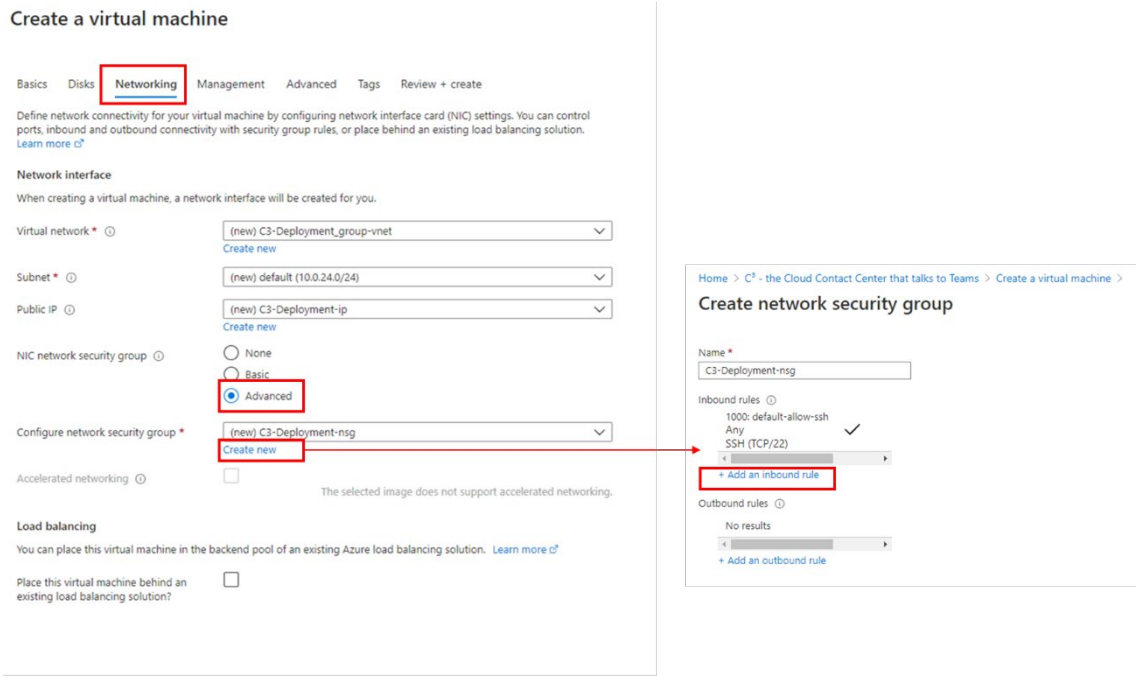
$$S = \frac{E \times BH \times RP \times 34560}{1024 \times 1024}$$

2. Proceed clicking on ***Next: Networking***;

2.4 Networking

In the ***Networking*** tab:

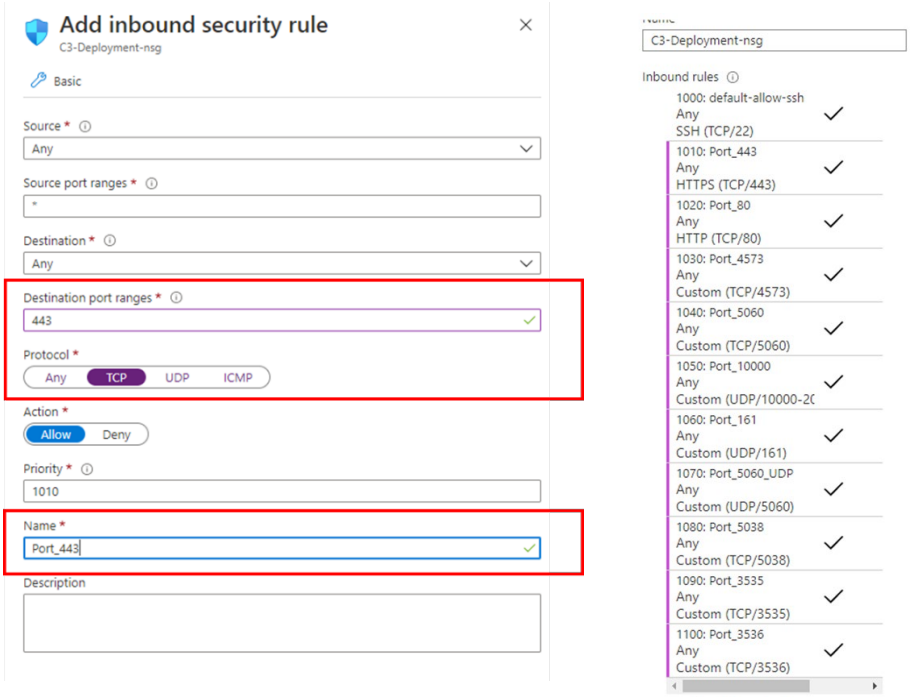
a. ***Virtual network***: select the desired virtual network from the dropdown menu;
b. ***NIC network security group***: select advanced and create a new security group.
The network security group allows to define which network ports should be opened. You will have to configure them as detailed below.
To start, click ***Create new*** in the ***Configure network security group*** option.



In order to add the inbound security rules, click on ***Add an inbound rule*** and, in the ***Add inbound security rule*** section insert the ***Destination port ranges***, select the ***Protocol*** and give the new port the desired ***Name***. Do this for all the ports listed in the table below.

Ports to be opened are:

- **443/tcp,**
- **80/tcp,**
- **4573/tcp,**
- **5060/tcp,**
- **10000-20000/udp,**
- **161/udp, 5060/udp,**
- **5038/tcp,**
- **3535/tcp,**
- **3536/tcp.**

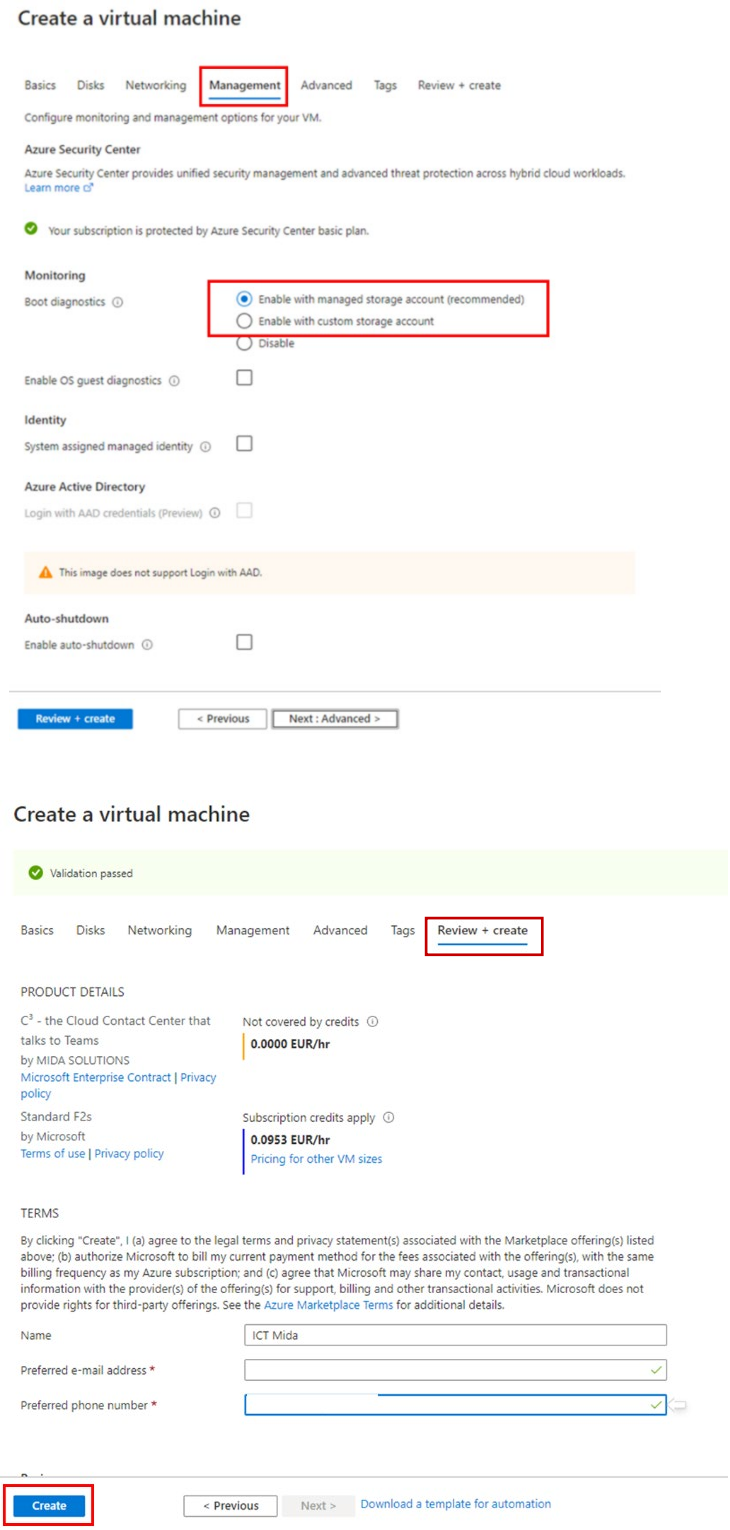


Once completed, the opened port list should look as shown in the picture on the right.

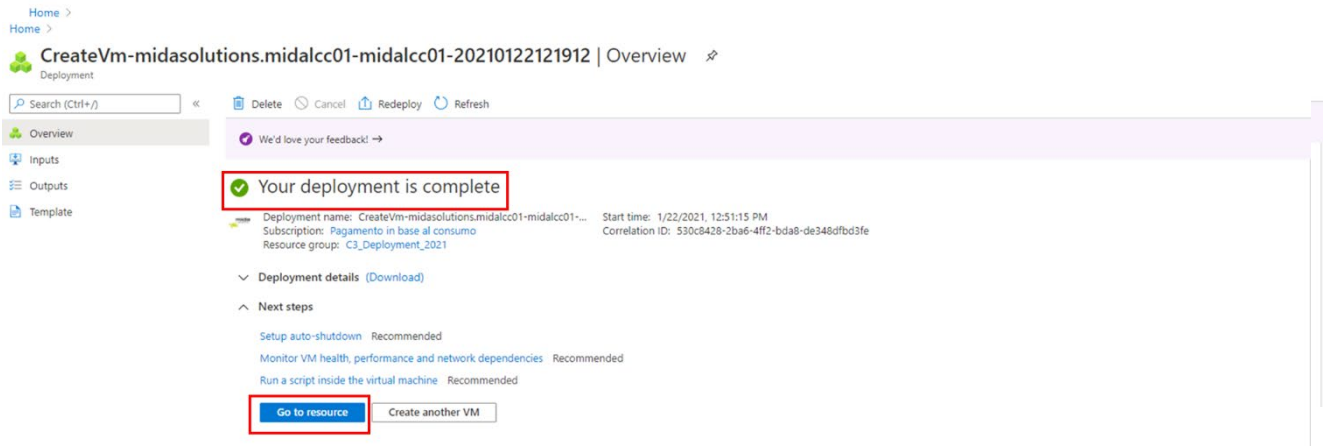
If the configuration is completed, click ***OK*** and then ***Next: Management***.

2.5 Management

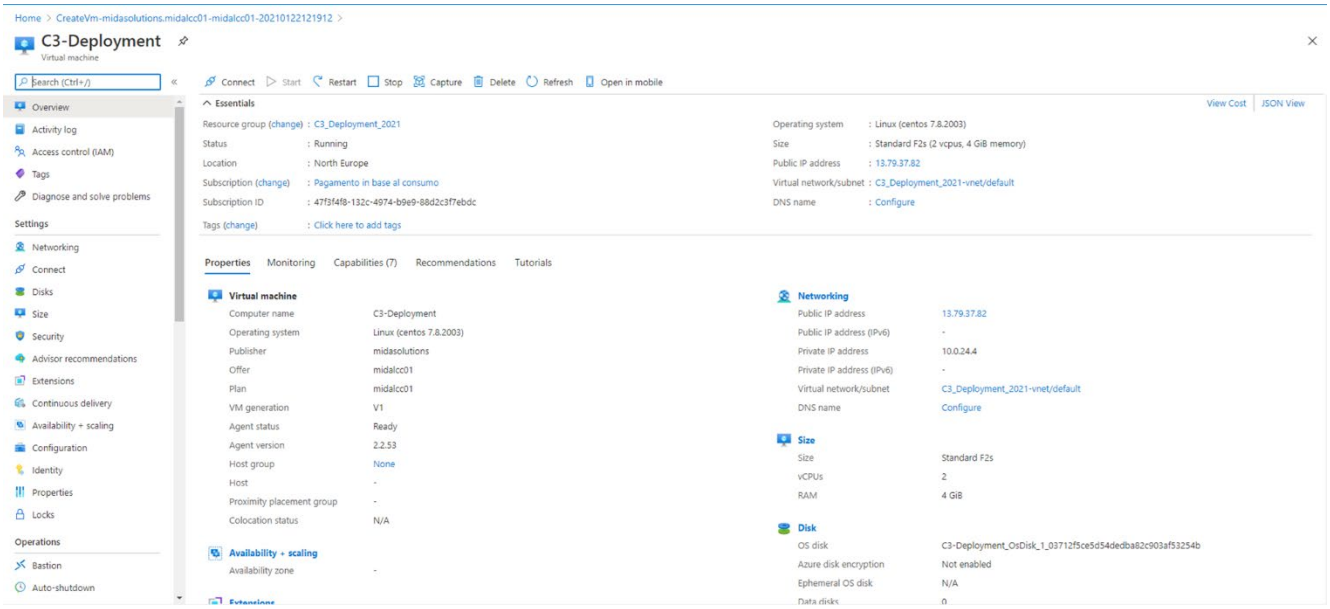
1. In the ***Management*** tab, just select the desired ***Boot diagnostic***
2. Click on ***Review + create*** once complete.
3. In the ***Review + create*** page, review all Virtual Machine details and click on ***Create*** to proceed with the Virtual Machine deployment.



This may take a while and the system will notify you once the procedure is complete.

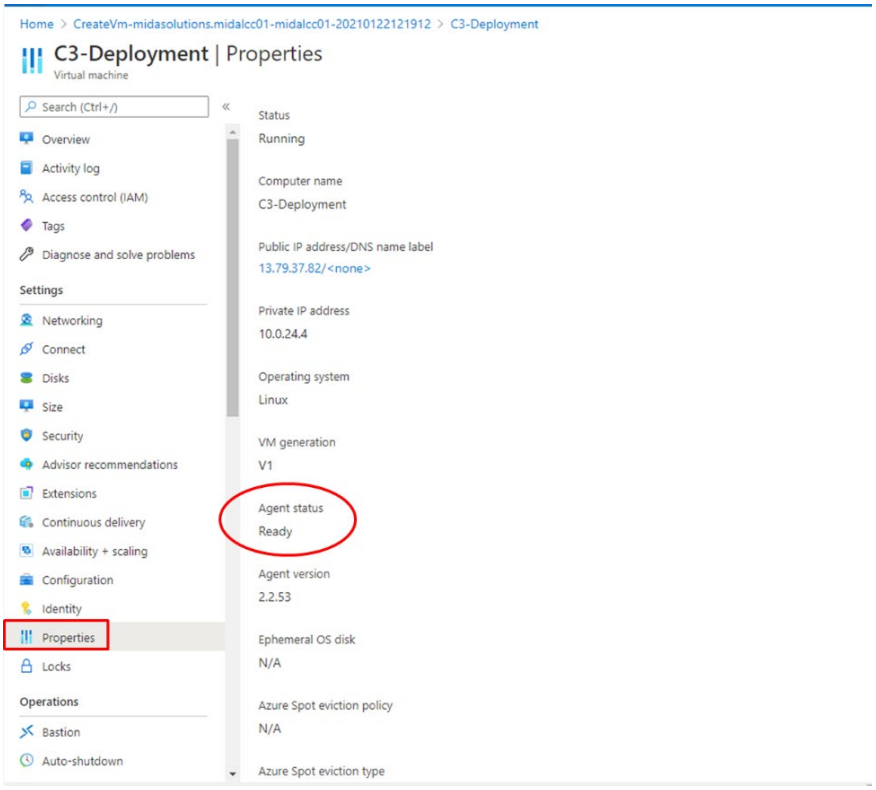


When the deployment is completed, click **Go to resource.**
The page below will appear.



Please note that, in order to use the VM, Microsoft Azure needs to activate an agent. If the agent activation is not automatically configured, open the created virtual machine from the virtual machine list, and go to ***Setting > Properties***.

In Properties you can see if the agent status is ready, as in the figure below. If not, you need to activate it.

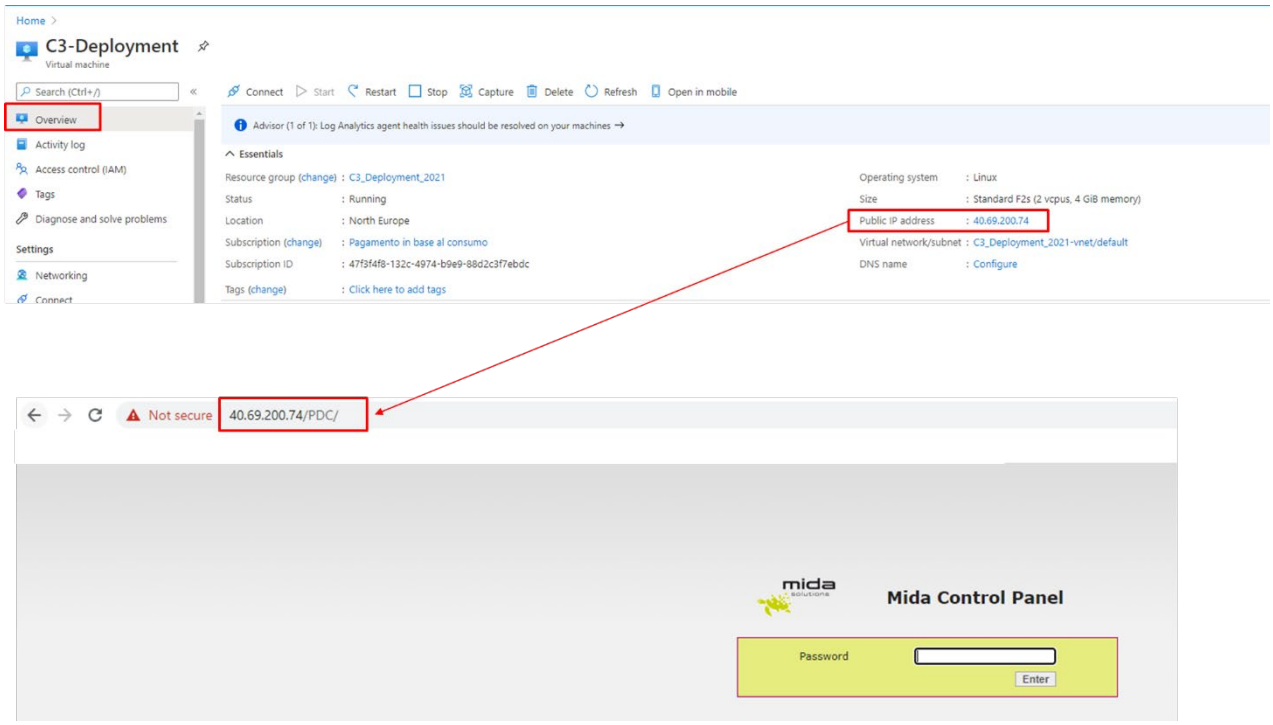


3. License application & install updates

3.1 License Request and Setup

In order to use the Mida products you have chosen. you need to install a valid system license.
Please note that the Virtual Machine you download from Azure Marketplace comes already with 30 days trial license with some limitations. It is for evaluation purposes only. If you plan to have a final deployment you should follow the procedures below to obtain a valid perpetual license.

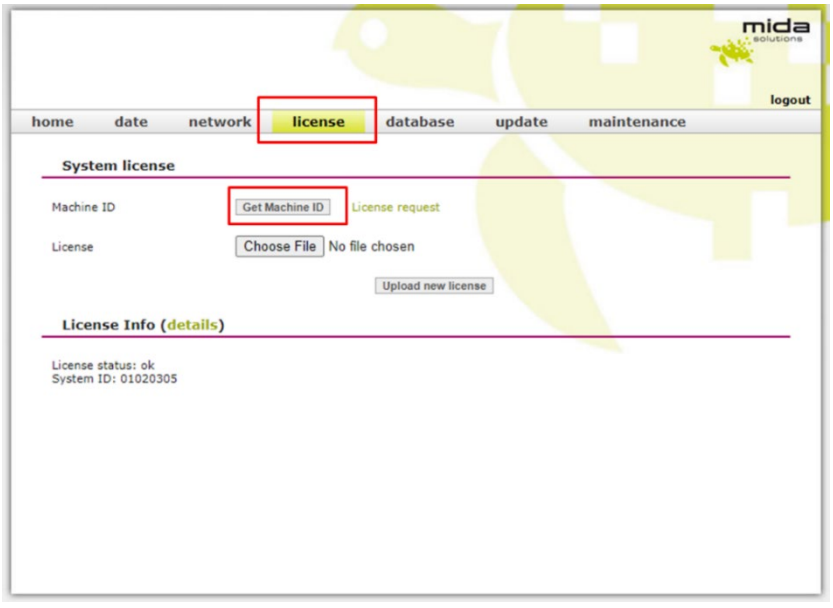
The Virtual Machine has a Public IP address. You can find it in the overview panel. Copy and paste it in a web browser, adding “/PDC/”, as in the figure below.



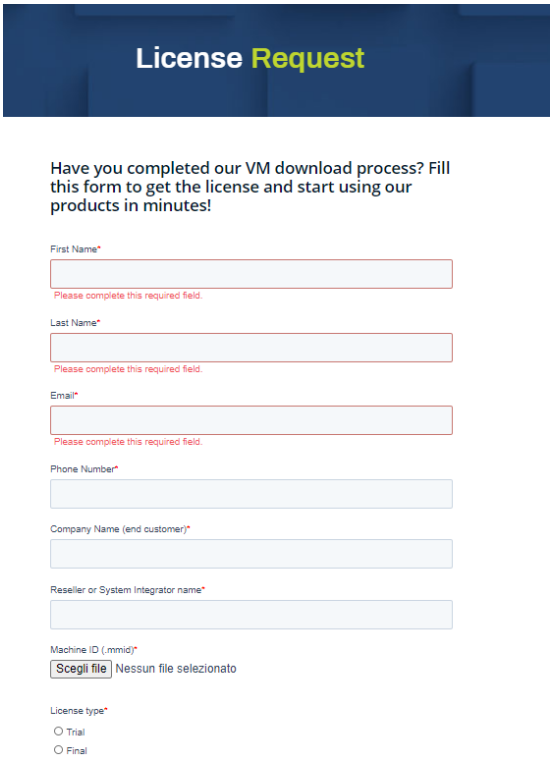
The first-access password is admin, do not forget to change it for future login.

Open the “license” tab (see picture below).

Press **Get Machine ID**.



Download the MidaGetLicense.mmid file from the system: this is required to submit a license request. Now you should get in contact with Mida Solutions to get your license. To do so, use the online **license request** form: http://www.midasolutions.com/support/license-request/



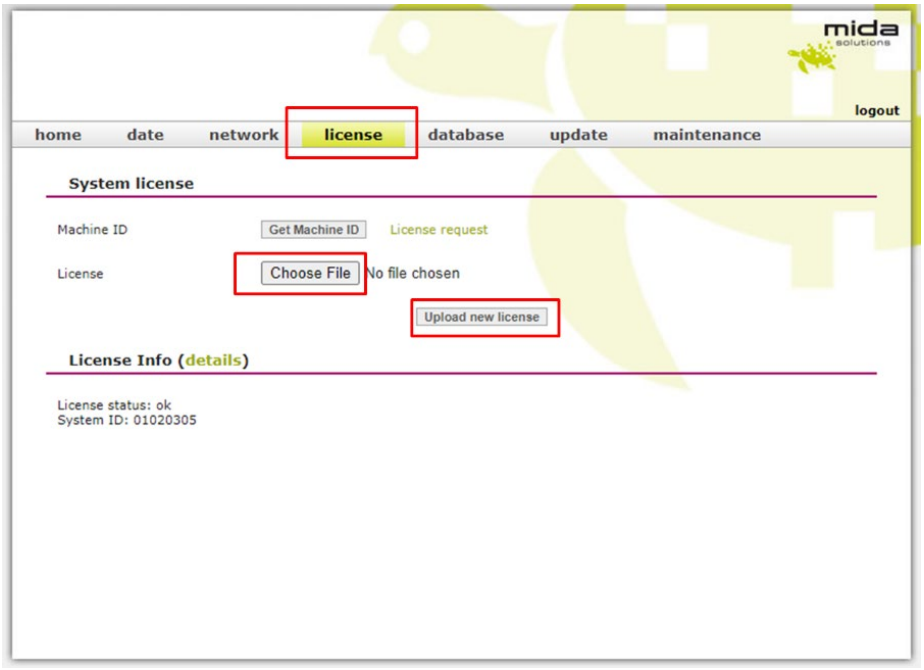
The form (see following picture) shall be filled reporting all relevant information such as your name and surname, email address, phone number, end customer company name, and reseller or System integrator you prefer to involve.

Upload the Machine ID file you just downloaded (.mmid) and specify the license type you are requesting for: trial or final license. Click on the authorization flag, insert optional notes and press submit.

You will receive immediately a confirmation email and Mida will process your request as soon as possible.

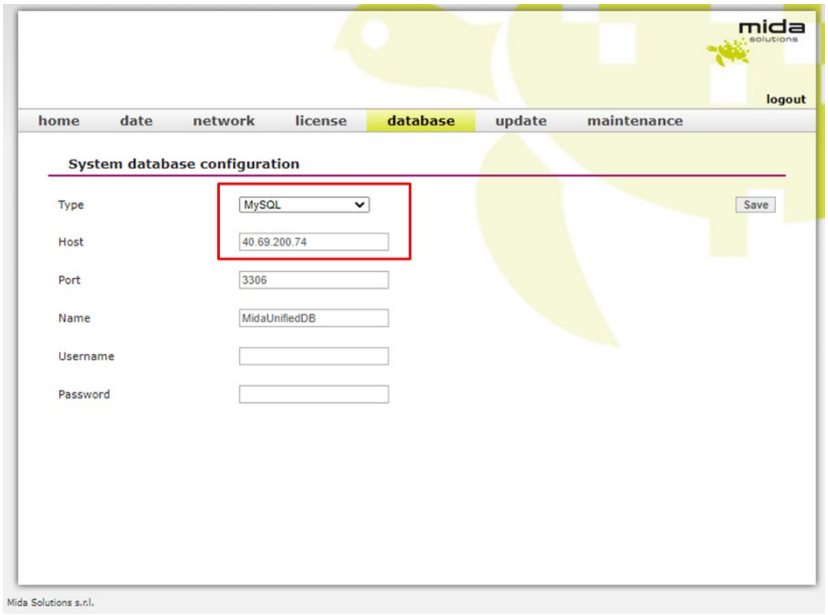
Once you have received the **license file** from Mida Solutions, go back to the "/PDC/" web page you used to generate the .mmid file and upload it.

To do so, press **Upload new license** (as in the picture below).



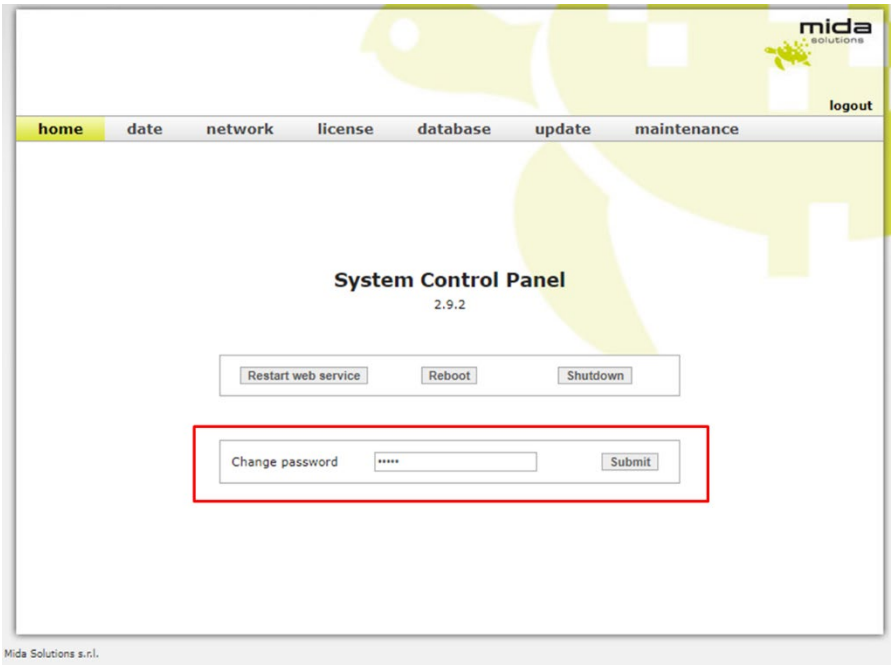
3.2 Preference settings

In the database area you can configure the application's database. **Mida products normally make use of an internal database** (as in the picture below), **but can also use an external one**.



If you decide to use the internal database, don't change the default settings that appear in the page. Otherwise, select the database type (it could be MySQL or MS SQLServer) and provide values for all the required parameters.

To change the default password for the /PDC/, you should now go to home section, and set the new one.



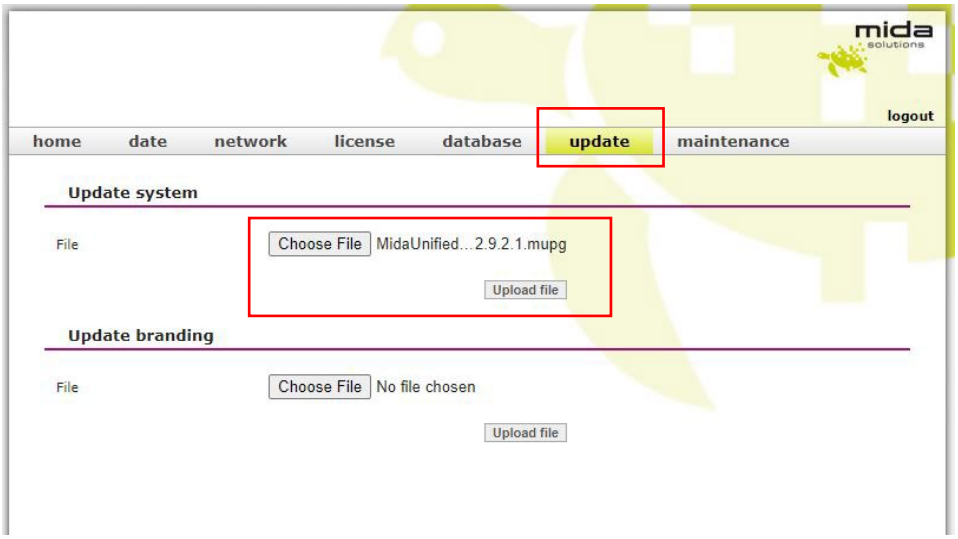
Now you have correctly set the license and you can start using Mida Solutions' products. If you like, you can customize other sections (like "date", "maintenance") or you can leave them by default.

For further details on the Control Panel please refer to "Mida Appliance-Administration Manual".
For further details on the main platform portal and administration options please refer to "Mida Unified Portal-Administration & User Manual".

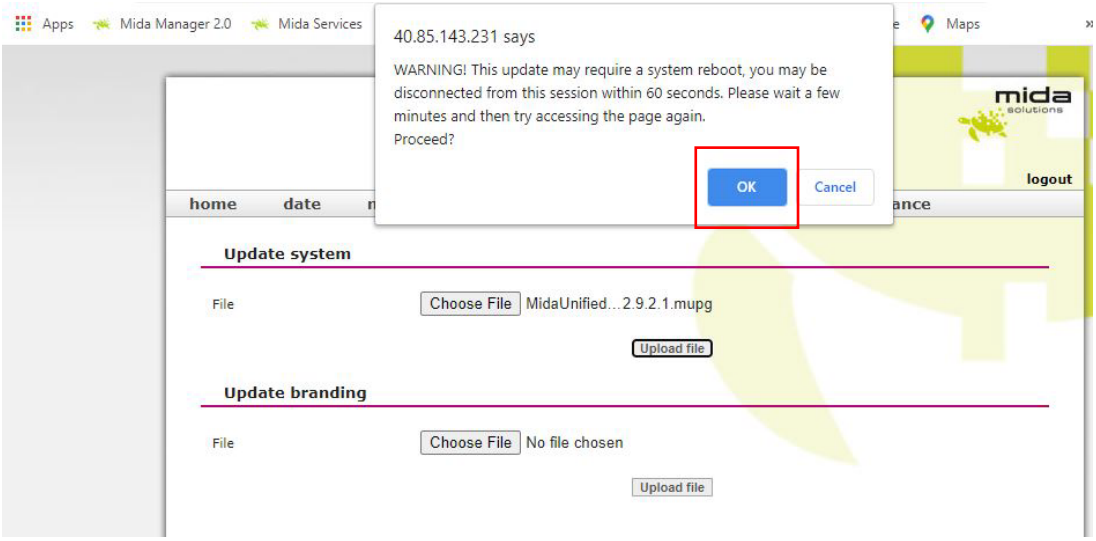
3.3 Update a new release

To make sure the installed version is the last one, **contact Mida Solutions at licensing@midasolutions.com**. In the event there is a more recent release available, we will send you a file (.mupg) to update it. You should then go to the "update" section of the PDC to upload and install it (as in the picture below).

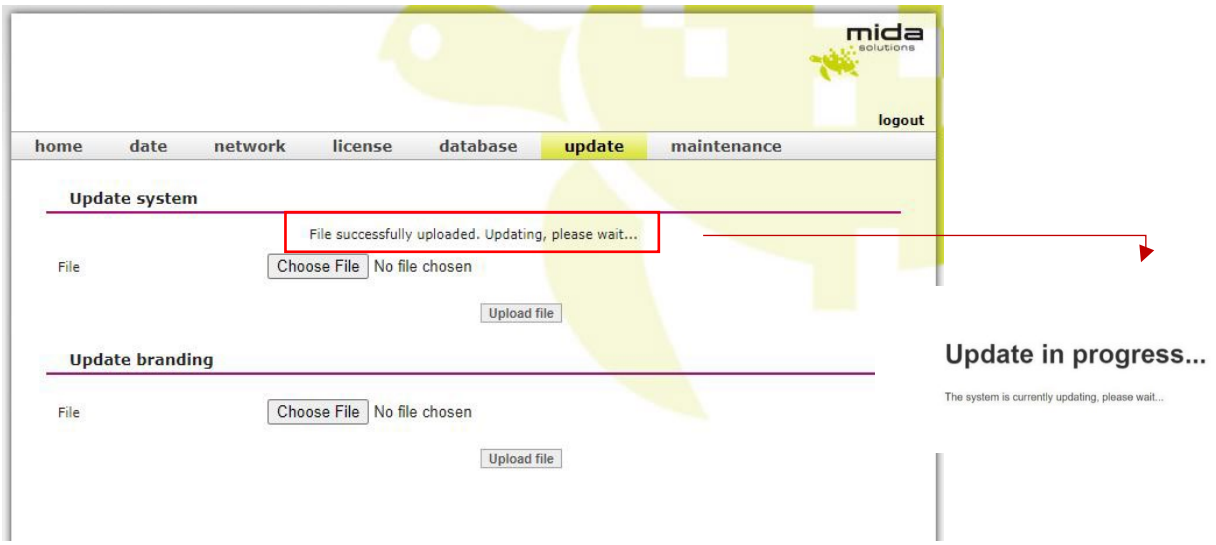
The update process normally requires some minutes, please wait and follow the instruction.



After clicking on “upload file” a pop up will appear to warn you the upload may require a system reboot to be completed. Click ok and then wait for the update to be completed, the process might take some minutes.



When the file is correctly uploaded, you will see a written notice. Now the update process will start.



Once the update has finished, in the “home” section you will see the new system release (as in the picture below). It is always a good practice to reboot the VM after updating it with a new release.

Save to confirm.