Tokenizer Configurator

Printable Help

Version 2022 R1

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Abstract

This document is a printable version of Tokenizer Configurator help.

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Configuration Checklist

Complete the following steps in the order listed to configure the Tokenizer service.

1. Install Tokenizer Database Tables.
2. Start Tokenizer Configurator.
3. Create the Tokenizer Database.
4. Specify the Tokenizer Service Settings.
5. Specify the Database Encryption Key.
6. Create the Tokenizer Service.
7. Transfer the Master Database Key to the Service Account.
8. Test the Tokenizer Service.

Install Tokenizer Database Tables

The Tokenizer installation contains a SQL file that creates the required Microsoft SQL Server database tables.

> **Note:** Only use the SQLite File database when setting up a Tokenizer service for testing purposes.

To install Tokenizer database tables

1. Locate "DbMsSql_Tables.sql" in the "C:\Program Files(x86)\Interactive Intelligence\Interaction Collector\Tokenizer" directory.
2. Run the file as a script in SQL Server Management Studio on the Tokenizer database.
3. Continue to the next step in the checklist.

Start Tokenizer Configurator

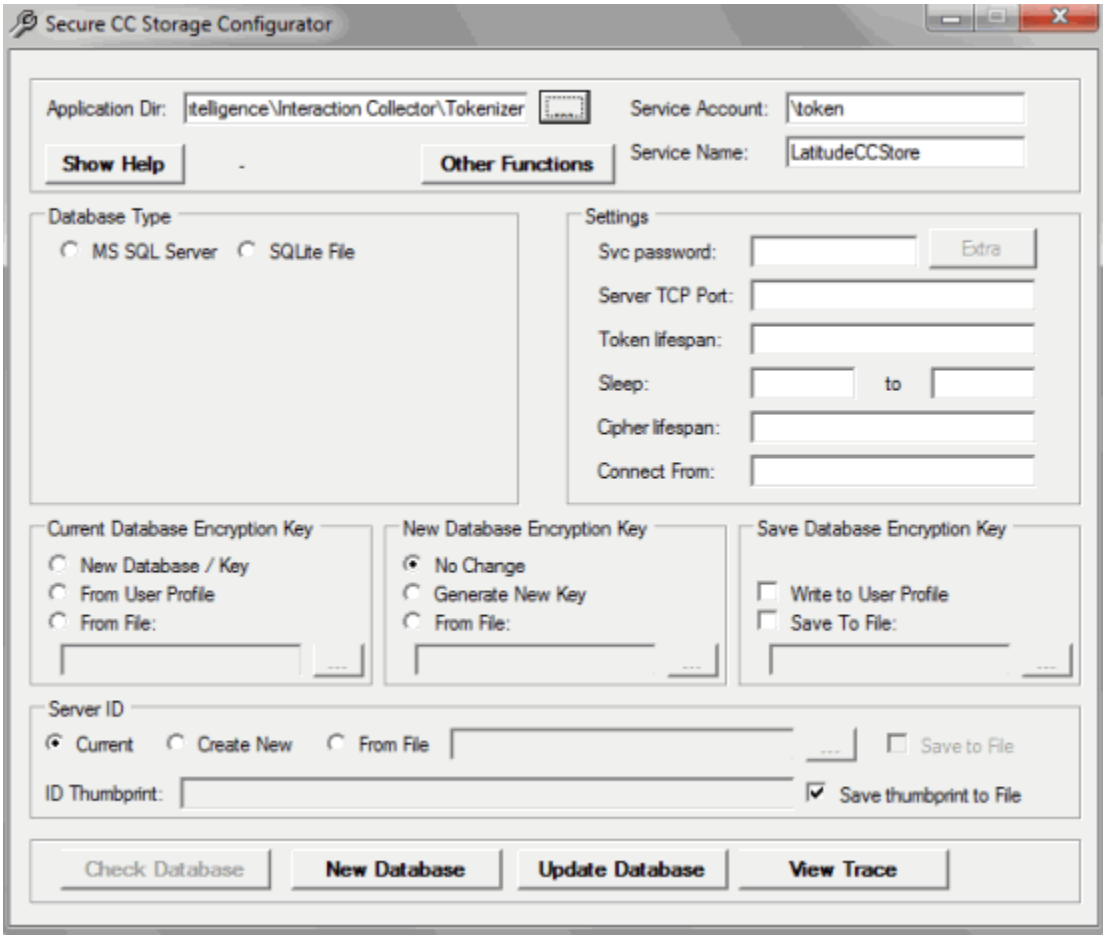
Use the **Secure CC Storage Configurator** window to set up required entities and establish relationships between Payment Vendor Gateway and the Tokenizer Database.

To start Tokenizer Configurator

1. Click **All Programs** > **Interactive Intelligence** > **Interaction Collector** > **Tokenizer Tools** > **Tokenizer Configurator**. The **Secure CC Storage Configurator** window appears.

Note: If you just ran the Tokenizer installer, the Tokenizer Configurator opens automatically.

2. Next to the **Application Dir** box, click the ellipsis (**...**).
3. Select the Tokenizer installation directory. The default location is "C:\Program Files(x86)\Interactive Intelligence\Interaction Collector\Tokenizer".



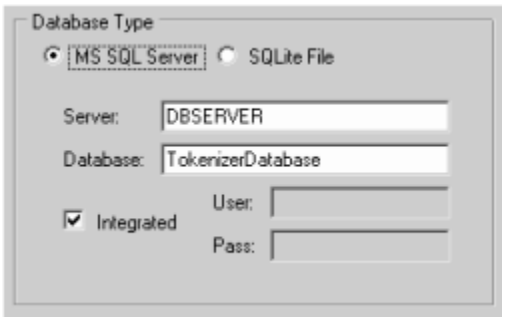
4. Continue to the next step in the checklist.

Create the Tokenizer Database

Use the **Database Type** section of the **Secure CC Storage Configurator** window to create the Tokenizer database.

To create the Tokenizer database

1. Locate the **Database Type** section of the **Secure CC Storage Configurator** window.



Database Type: Click **MS SQL Server**. Only click **SQLite File** for a test database. For more information, see Create a SQLite Test Database.

Server: Name of the Tokenizer database server.

Database: Name of the Tokenizer database.

Integrated: If selected, the system uses SQL Server's integrated security to access the Tokenizer database. If cleared, the system uses the standard security credentials.

User: User ID for accessing the Tokenizer database. Provide this information if you cleared the **Integrated** check box.

Pass: Password for accessing the Tokenizer database. Provide this information if you cleared the **Integrated** check box.

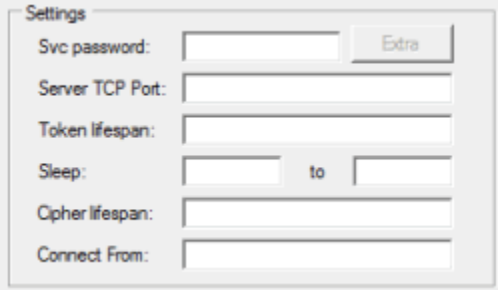
2. Complete the information and then continue to the next step in the checklist.

Specify the Tokenizer Service Settings

Use the **Settings** section of the **Secure CC Storage Configurator** window to specify the settings for the Tokenizer service. Tokenizer stores the Tokenizer service settings in an XML file instead of the database.

To specify the Tokenizer service settings

1. Locate the **Settings** section of the **Secure CC Storage Configurator** window.



   Srv password: Password that Tokenizer clients (like PVG) use to authenticate to the Tokenizer service.

   Server TCP Port: Network TCP port on which the Tokenizer service listens. The default port is 840.

   Token lifespan: Lifespan of a token, in days. The default is 100. If a Tokenizer client sets the lifespan (for example, in PVG's web.config file), the value in this box is ignored. Tokenizer deletes all tokens that aren't used within the specified lifespan.

   Sleep: Start and end time to place the computer running Tokenizer in sleep mode. During the sleep period, the system doesn't run automatic housekeeping tasks.

   Cipher lifespan: Number of days to use a cipher after it expires. The default is 7. Tokenizer re-encrypts tokens encrypted with an expired cipher.

   Connect From: List of IP addresses (separated by a space) from which Tokenizer allows connections. For example, for PVG, list the IP addresses of all your PVG servers.

2. Complete the information and then continue to the next step in the checklist.

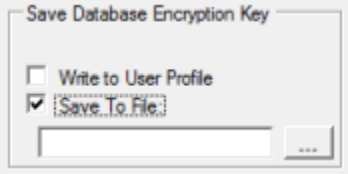
Specify the Database Encryption Key

Use the **Settings** section of the **Secure CC Storage Configurator** window to specify the database encryption key. Store the database master encryption key under the service account. Only remove or back up this file after completing the installation.

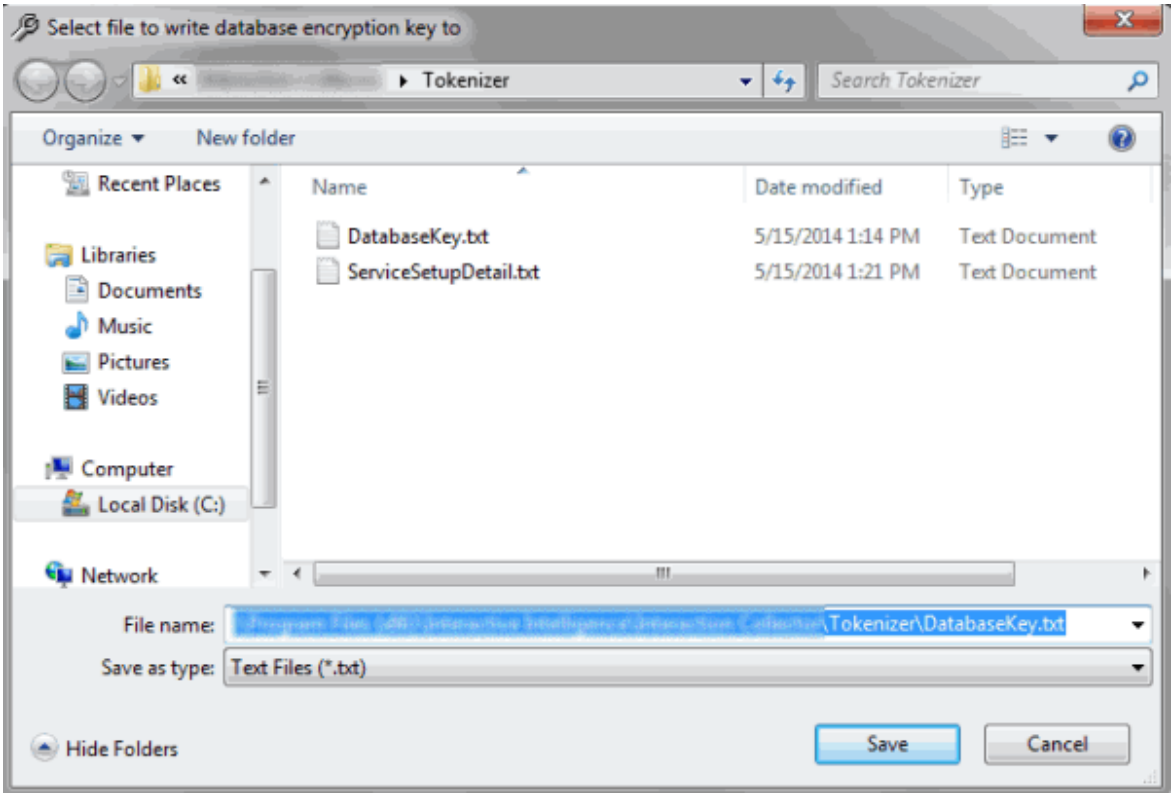
To specify the database encryption key

1. In the **Current Database Encryption Key** section, click **New Database/Key**.

2. In the **Save Database Encryption Key** section, select **Save to File**.

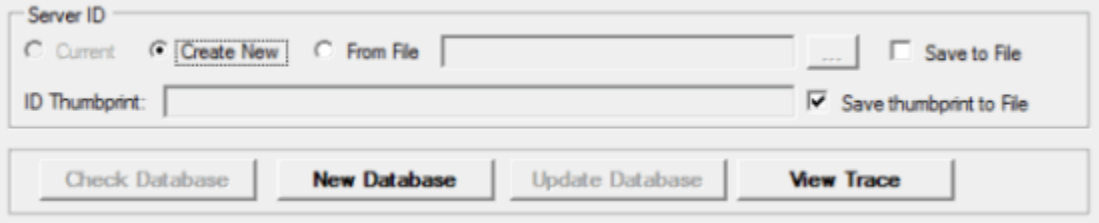


3. Click the ellipsis (**...**). The **Select file to write database encryption key to** dialog box appears.



4. Click **Save** to accept the default file name.

5. In the **Server ID** section, click **Create New** and then select **Save thumbprint to File**. The thumbprint value is not case-sensitive; it verifies the identity of the Tokenizer. Leave the file in place after creating the configuration.



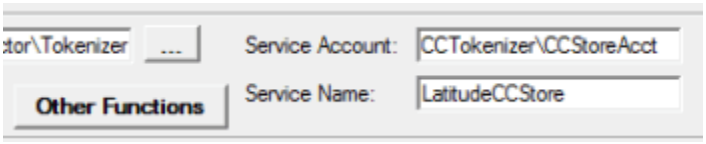
6. Click **New Database**. A notification dialog box appears.
7. Click **OK**. The system populates the **Current Database Encryption Key** section with the **Save to File** value and selects **Current** in the **Server ID** section.
8. Complete the information and then continue to the next step in the checklist.

Create the Tokenizer Service

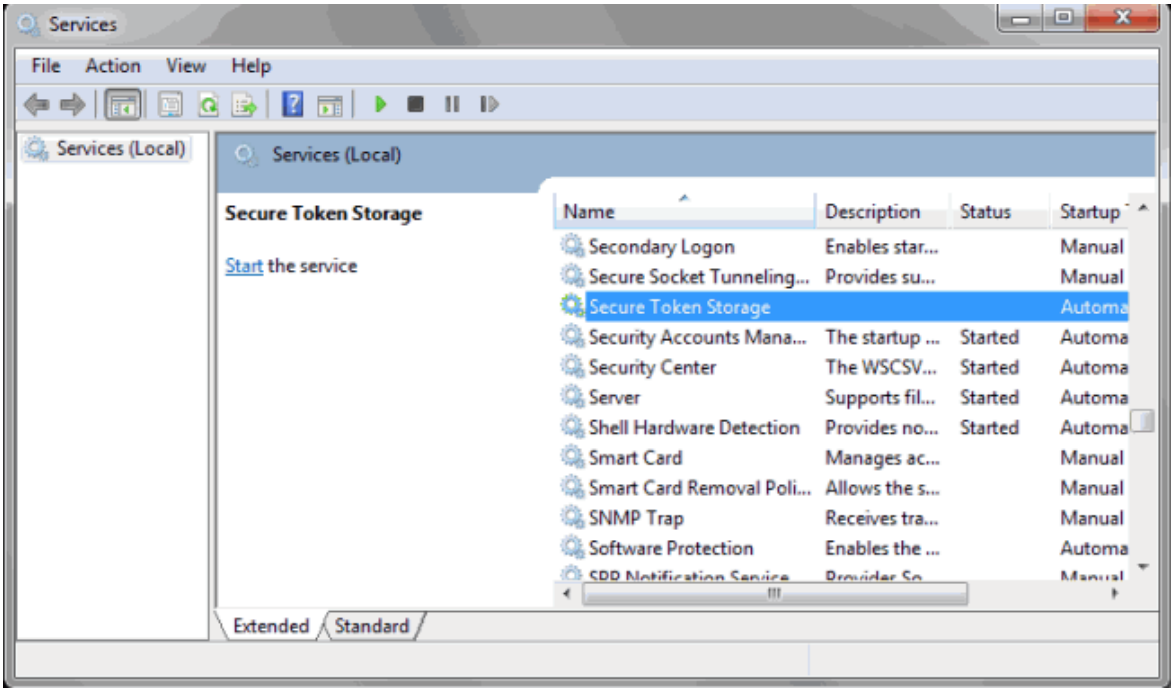
Use the **Settings** section of the **Secure CC Storage Configurator** window to create the Tokenizer service and start it. Create a service account as a local account (not a domain account) to run the Tokenizer service. If you require a domain account, consult with Latitude by Genesys Support. The service account does not require administrator group privilege. Log on to the service account at least once before proceeding with configuration.

To create the Tokenizer service

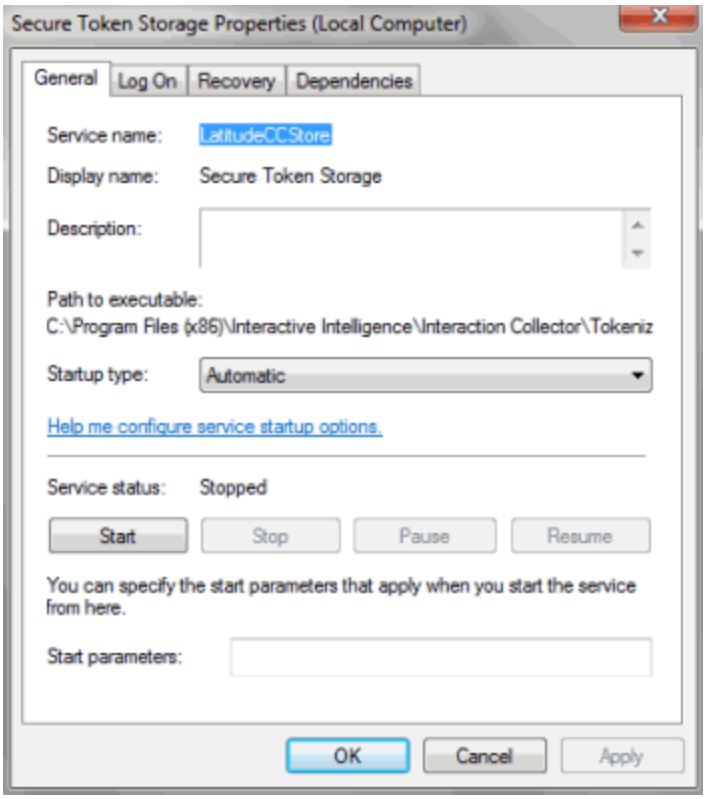
1. In the **Service Account** box, type the Tokenizer service account using the format "domain\username." The "domain" value is the computer name for local accounts. In the following example, the server name is "CCTokenizer" and the account is "CCStoreAcct".



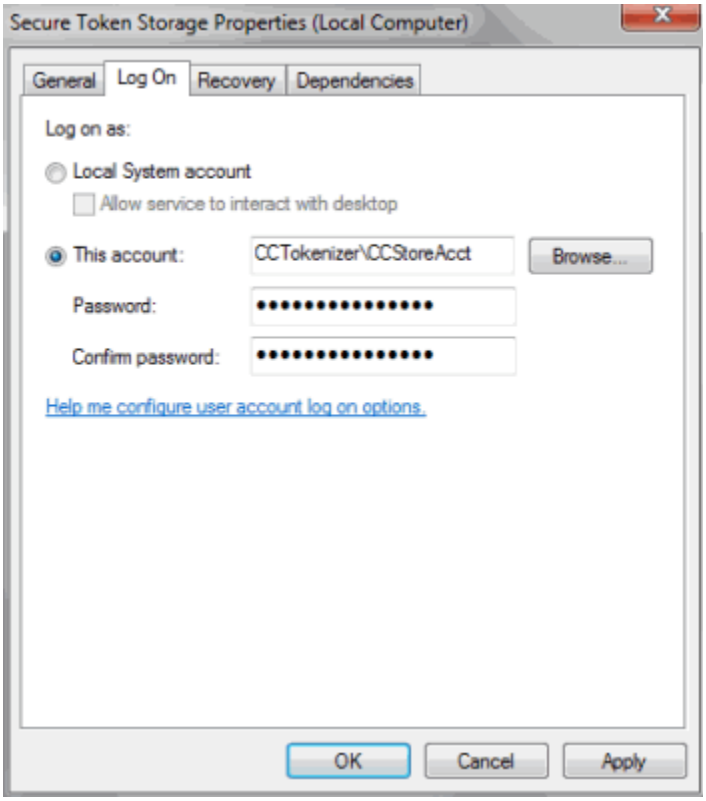
2. In the **Service Name** box, type the name of the Tokenizer service. The default value is "LatitudeCCStore." To use a different service name, contact Latitude by Genesys Support.
3. Click **Other Functions** and then click **Create Service**. A notification dialog box appears.
4. Click **OK**. The **Services** window appears.



5. Double-click **Secure Token Storage**. The **Secure Token Storage Properties** dialog box appears.



6. Click the **Logon** tab.



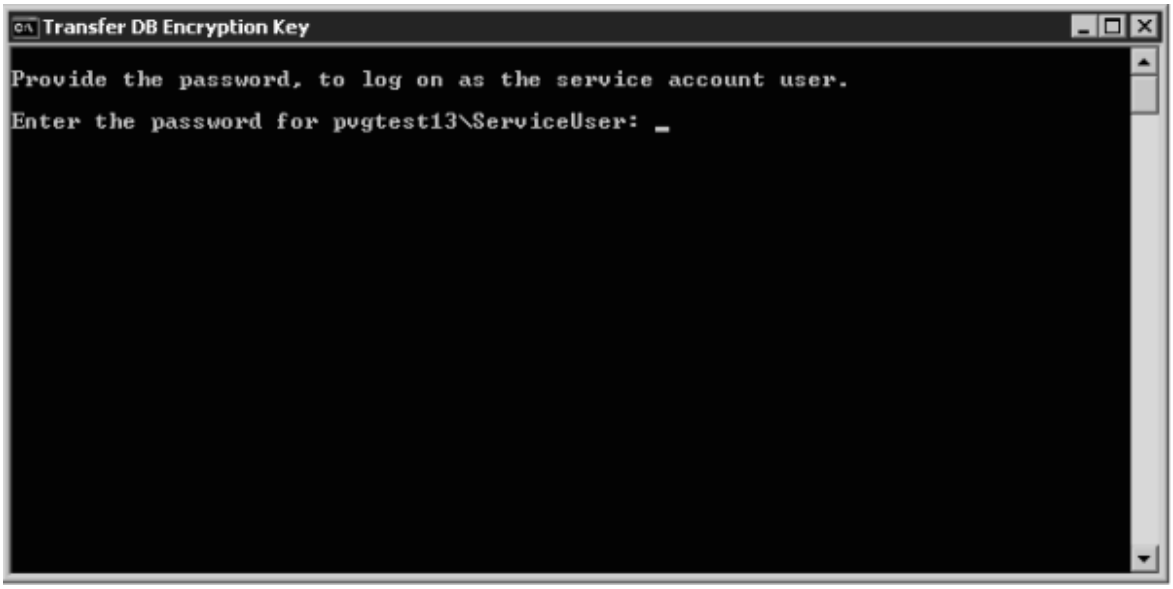
7. Click **This account** and, in the box, type the same value that you typed in the **Service Account** box in the **Secure CC Storage Configurator** window.
8. In the **Password** and **Confirm password** boxes, type the account password. A notification dialog box appears.
9. Click **OK** and then close the **Services** window.
10. Continue to the next step in the checklist.

Transfer the Master Database Key to Service Account

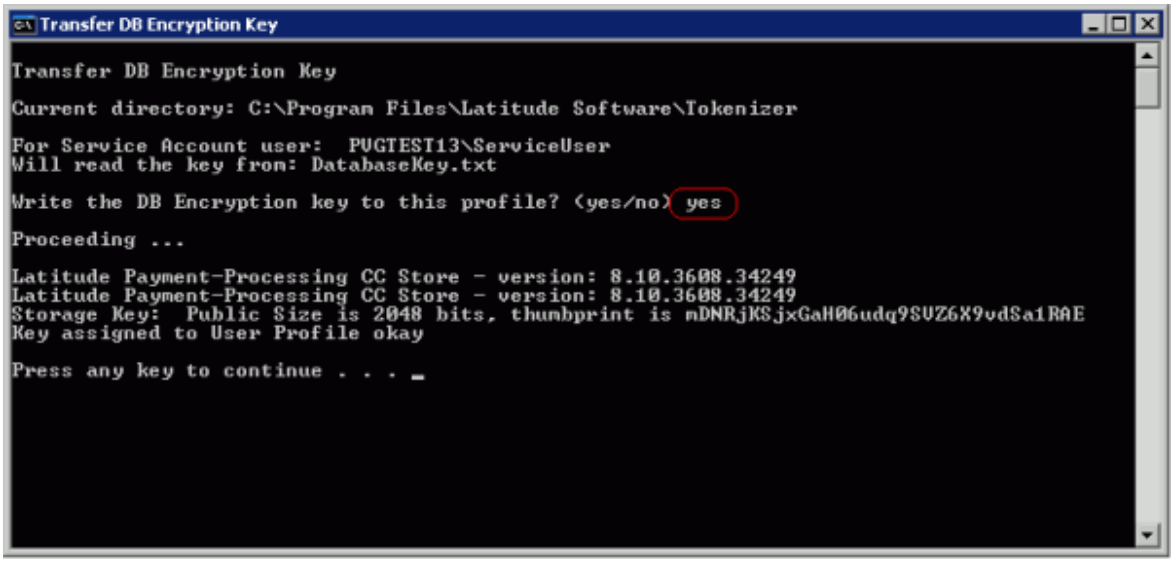
Use the **Transfer DB Encryption Key** window to transfer the master database key to the service account after creating the service.

To transfer the master database key to the service account

1. In the top section of the **Secure CC Storage Configurator** window, click **Other Functions** and then click **Transfer Key to Service Account**. The **Transfer DB Encryption Key** window appears and prompts you for the service account password.



2. Type the password for the service account and then press **Enter**. A second command window appears, requesting confirmation to store the key in the user profile.



3. Type **yes** and then press **Enter**.
4. Verify that the "**Key assigned to User Profile okay**" message appears. If this message does not appear, contact Latitude by Genesys Support.

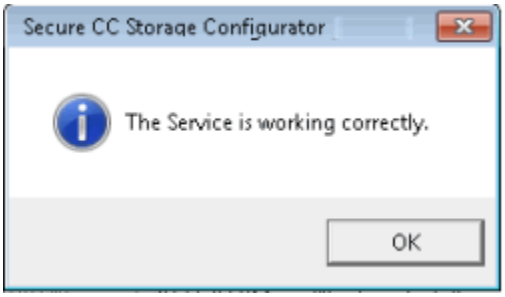
5. Press **Enter** twice. The **Transfer DB Encryption Key** window closes.
6. Continue to the next step in the checklist.

Test the Tokenizer Service

Test the Tokenizer service to verify that it is working properly.

To test the Tokenizer service

1. In the top section of the **Secure CC Storage Configurator** window, click **Other Functions** and then click **Test Service**. If the service isn't running, Tokenizer starts it. Tokenizer connects to the service and then verifies the database identity and functionality. A notification dialog box appears. If this window doesn't appear, contact Latitude by Genesys Support.



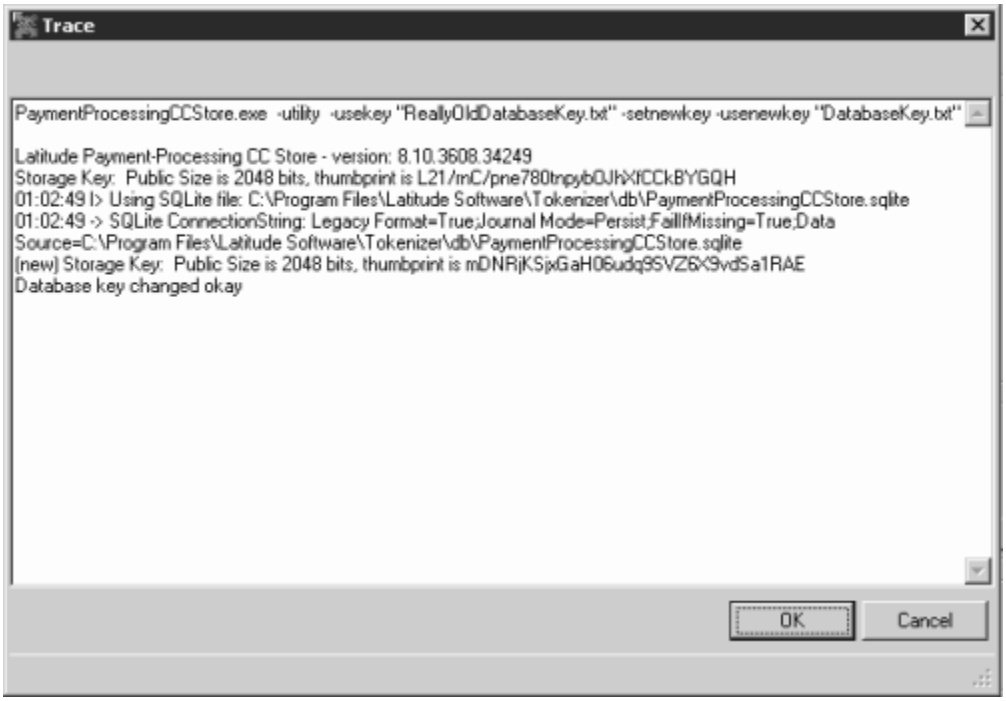
2. Click **OK**.

View the Trace Logs

Use the **Trace** dialog box to view the raw output of the configuration utility and determine whether a database operation (new, update, or check) failed.

To view the trace logs

1. In the lower section of the **Secure CC Storage Configurator** window, click **View Trace**. The **Trace** dialog box appears.



2. Select all the text and then copy and paste it into a text editor, such as Notepad or Word.

> **Note**: Ensure that you copy the information before closing the dialog box because once you click **OK** to close the dialog box, the system clears the information.

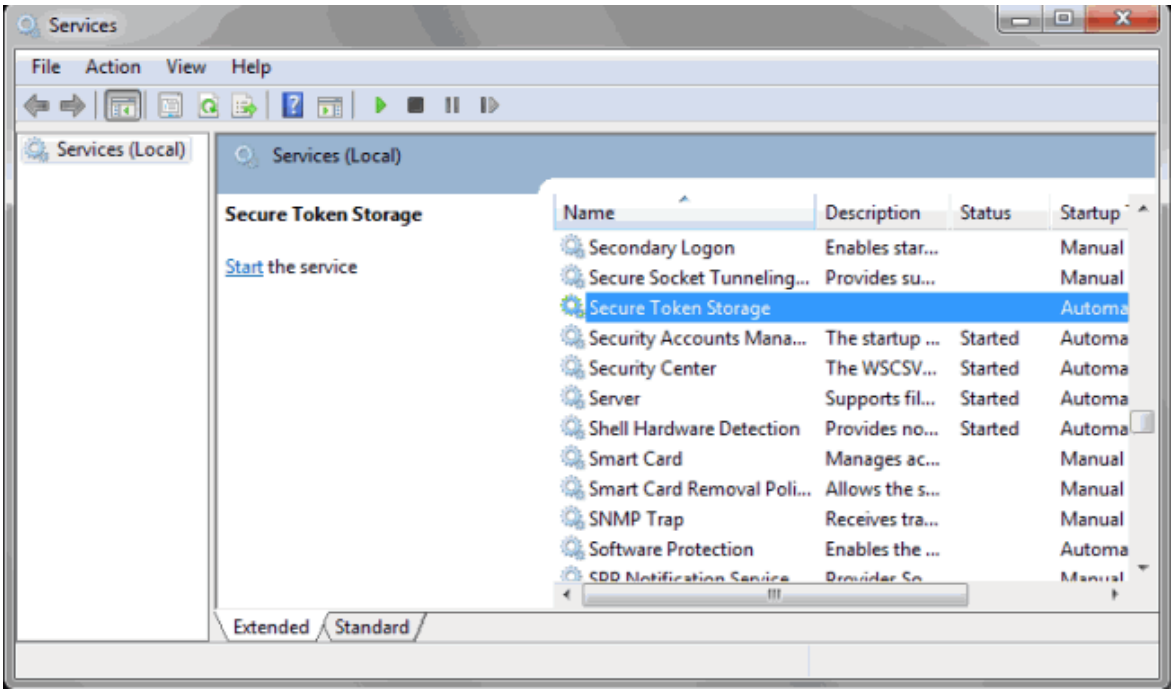
3. Click **OK**.

Change the Master Database Key

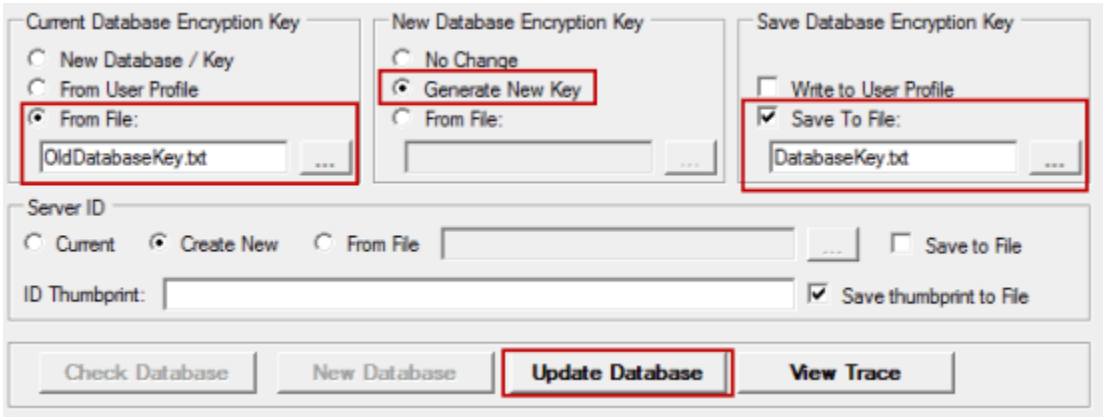
Use the **Settings** section of the **Secure CC Storage Configurator** window to change the master database key to support your company's security policies.

To change the master database key

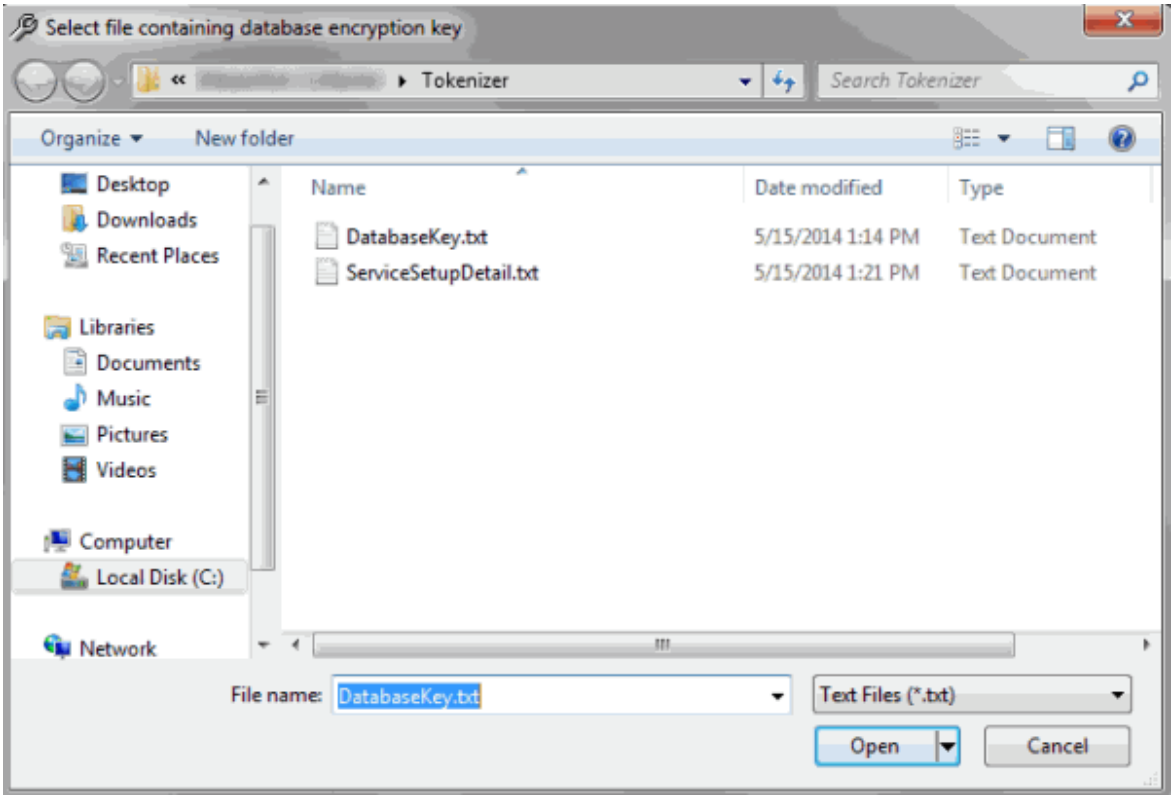
1. Perform a database backup using your company's backup procedure.
2. Click **All Programs** > **Administrative Tools** > **Services**. The **Services** window appears.



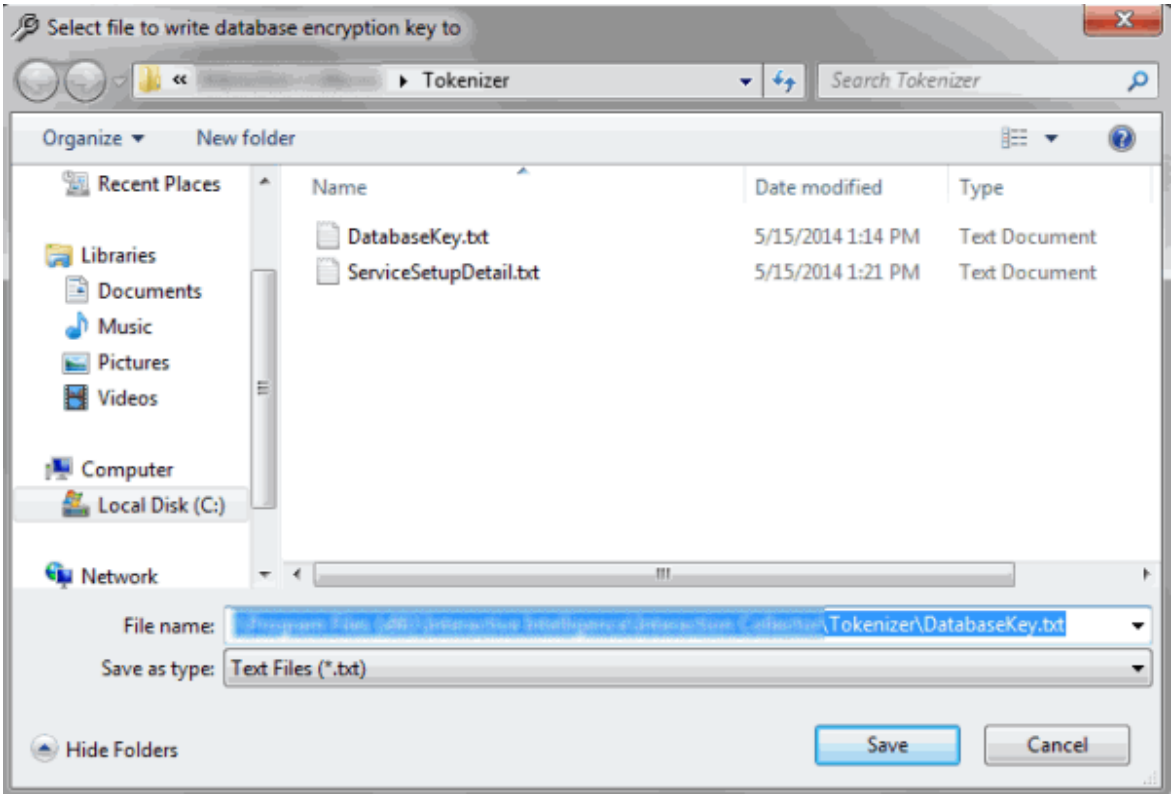
3. Right-click **Secure Token Storage** and then click **Stop**.
4. Close the **Services** window.
5. Copy the text file that contains the current (old) database key to the Tokenizer directory. The default location is "C:\Program Files(x86)\Interactive Intelligence\Interaction Collector\Tokenizer." Specify a name for the copied file, for example "OldDatabaseKey.txt."
6. Open the **Secure CC Storage Configurator** window.



7. In the **Current Database Encryption Key** section, click **From File** and then click the ellipsis (**...**). The **Select file containing database encryption key** dialog box appears.



8. Click the **DatabaseKey.txt** file (which contains the old key) and then click **Open**.
9. In the **New Database Encryption Key** section, click **Generate New Key**.
10. In the **Save Database Encryption Key** section, select **Save to File** and then click the ellipsis (**...**). The **Select file to write database encryption key to** dialog box appears.



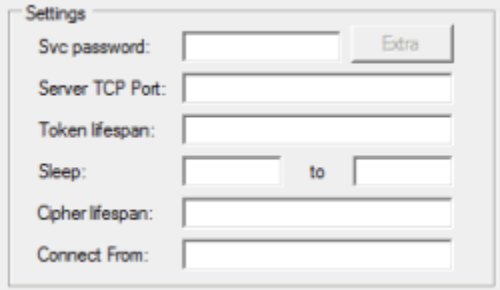
11. Click the **DatabaseKey.txt** file and then click **Save**.
12. In the lower section of the **Secure CC Storage Configurator** window, click **Update Database**. A notification dialog box appears.
13. Click **OK**.
14. Transfer the master key and then test the service.

Update the Tokenizer Service Settings

Use the **Settings** section of the **Secure CC Storage Configurator** window to update the settings for the Tokenizer service.

To update the Tokenizer service settings

1. Locate the Settings section of the Secure CC Storage Configurator window.



Srv password: Password that Tokenizer clients (like PVG) use to authenticate to the Tokenizer service.

Server TCP Port: Network TCP port on which the Tokenizer service listens. The default port is 840.

Token lifespan: Lifespan of a token, in days. The default is 100. If a Tokenizer client sets the lifespan (for example, in PVG's web.config file), the value in this box is ignored. Tokenizer deletes all tokens that aren't used within the specified lifespan.

Sleep: Start and end time to put the computer running Tokenizer in sleep mode. During the sleep period, the system doesn't run automatic housekeeping tasks.

Cipher lifespan: Number of days to use a cipher after it expires. The default is 7. Tokenizer re-encrypts tokens encrypted with an expired cipher.

Connect From: List of IP addresses (separated by a space) from which Tokenizer allows connections. For example, for PVG, list the IP addresses of all your PVG servers.

2. Modify the information as necessary and then, in the lower section of the window, click **Update Database**.

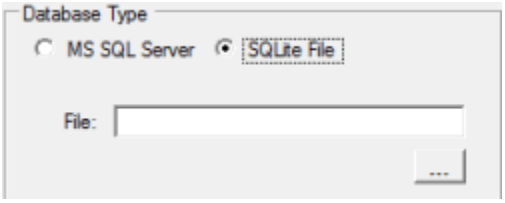
Create a SQLite Test Database

Use the **Settings** section of the **Secure CC Storage Configurator** window to set up a SQLite database for testing purposes. Ensure that the service account has "full control" permissions on the directory where you create the SQLite database.

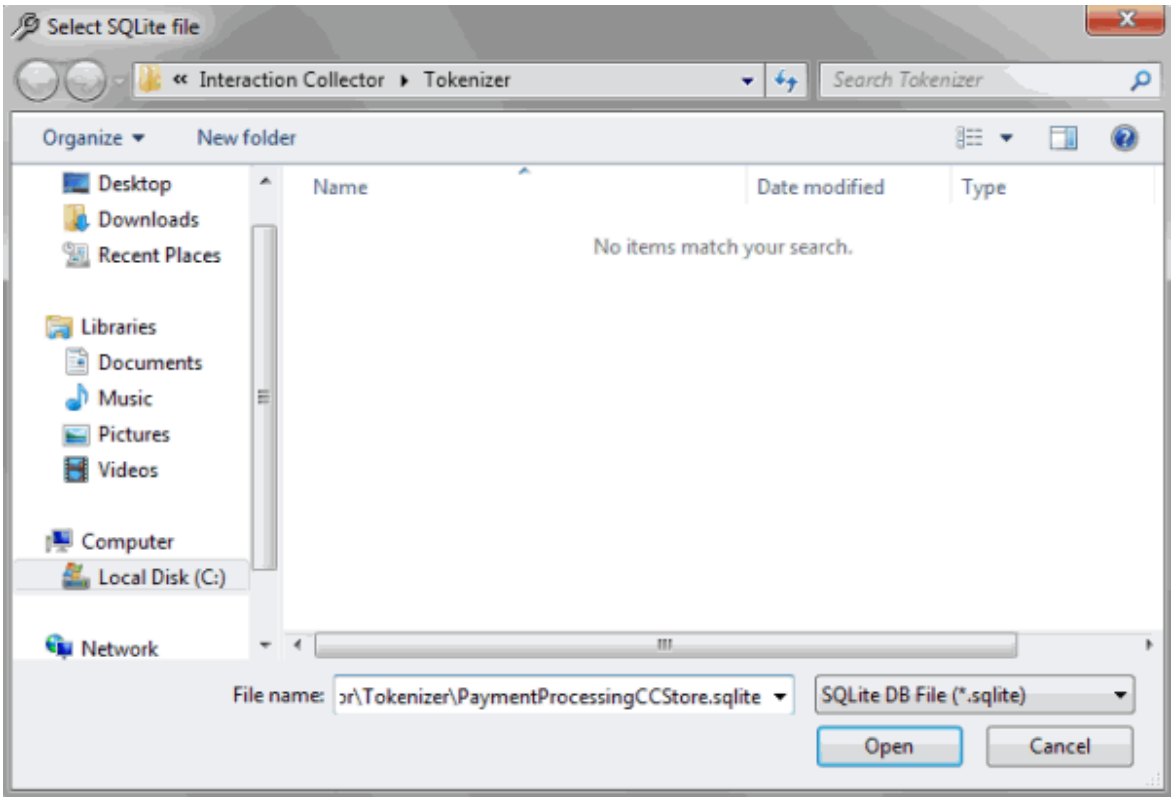
Note: Tokenizer supports the SQLite database in test mode only.

To create a SQLite test database

1. Log on to your network using a service account.
2. Open the **Secure CC Storage Configurator** window.
3. In the **Database Type** section, click **SQLite File**.



4. Click the ellipsis (**...**). The **Select SQLite file** dialog box appears.



5. Create or select a subdirectory in the Tokenizer installation directory. Contact Latitude by Genesys Support when placing the SQLite database in a directory that isn't within the Tokenizer directory.

6. In the **File name** box, type a name for the SQLite database file and then click **Open**. The file path and name appear in the **File** box in the **Secure CC Storage Configurator** window.