

Vertify Agent Setup Guide

This document outlines the required initial setup steps for using the Vertify Agent.

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PURPOSE OF DOCUMENT

The Vertify Agent is a Windows Service Application that allows Vertify to integrate with on-premise systems. It communicates with the Vertify Platform over a secure 128-bit SSL connection using the standard SSL port (443). It does not require any special configuration of your firewall. Once installed, the Agent automatically updates itself as new versions of Vertify are released, eliminating the need to manually update the Agent.

This document provides instructions on how to install/uninstall the Agent from Vertify, how to use the Agent, and other important information about the Agent.

Installing the Agent

Downloading the Agent

1. To install the Vertify Agent, log into Vertify with your credentials: https://{yourinstance}.{your region: us, eu, or au}.vertify.com



2. Go to the Configurations section.

VERTIFY	
Vertify ~ Environment	Overview
♠ Overview	Lead & Conta
Workspaces	
SETTINGS	
PeopleConfigurations	
	0

3. Click Agents to display the list of installed Agents.



4. Click the Download Agent button. This will download an MSI file (Windows Installation File) that will guide you through the installation process.¹

Configurations	
Environments Agents	Download Agent
Active Archived Deleted	🕰 Archive 🎁 Delete 🗌

Install

- 1. After the VertifyAgent.exe file is downloaded. Run the installer program by clicking the exe file.
 - a. NOTE: If a "Windows protected your PC" message pops up, choose the "Run anyway" option. Some versions of Microsoft do not recognize our Publisher, but newer versions do.

¹ By default, the Vertify Agent runs using the local system account. This grants the Vertify Agent full access to the computer it is installed on and its local resources. Most applications also grant this level of access to the local system account. This eliminates the need for any further configuration. If your security team requires that you run the service with a dedicated user account with minimum permissions see the <u>Optional User Account</u> Setup Section. Consult with your network security team to confirm this requirement. The Agent application is a client application (only outbound requests are made) and not a server application. Client applications are less likely to be vulnerable to network based attacks.

			×	
	Windows protec	cted your PC		
	Microsoft Defender SmartScre starting. Running this app mig	en prevented an unrecognized ap ht put your PC at risk.	p from	
_	App: VertifyAgent (6).exe			
Aş	Publisher: Vertify, Inc			mput
		Run anyway	Don't run	

2. Another box will appear asking if you want to allow app to make changes. Click "yes".



3. A default destination is then provided. Click "Install".

🐉 VertifyAgent Seti	p: Installation Folder	_		×
Setup will inst folder, click B installation.	all VertifyAgent in the following fo rowse and select another folder. C	lder. To ir Ilick Insta	nstall in a di Il to start th	feren Ie
Destination Folder	(x86)\VertifyAgent		Browse	
Space required: 7.1.1	4 5			
Space required: 7.1 h	18			
Space available: 12.1	GB			
Cancel	Vertify, Inc. 2021		Inst	all

4. The Vertify Agent Configuration should open automatically. Click "yes" when prompted to install the service.

Ľ	🐵 Vertify Agent Cor	nfigura	tion	-		\times
s	Configuration Friendly Agent Nar Vertify Username: Vertify Password: Vertify URL: Enable logging Connect	me:	EC2AMAZ-ISJNFRQ			
	Service Managemen	it ice Ins Vertify v?	all Agent service is not installed, would you like to Yes	o install it No	×	

- 5. Once the installation is complete the service will start. Add your Vertify login and URL in this step. You can name the Agent anything you like. Enable logging should be left unchecked; this will only be needed for debugging purposes. Once the login details are added, click "Connect".
 - a. NOTE: If the service doesn't start, please contact Customer Success or Support.

Vertify Agent Configur	ation –	-	×
Configuration			
Friendly Agent Name:	AgentDemo]	
Vertify Username:	integration		
Vertify Password:	************		
Vertify URL:	https://first-test-integrate.playground.vertify.com/Agent/Lis		
Enable logging			
Connect Re	egister		
Service Management			
Start Sh	00 Install Unisstall		
ordar 00	op misitali		
Install service is done, exit c Started service	ode 0		

- 6. Once you've clicked "Connect", the following success messages should display. Now click "Register".
 - a. NOTE: If there was a failure, please check URL credentials. If it continues to fail, contact Customer Success or Support.

	onfiguration			
	Friendly Agent Name:	AgentDemo		
	Vertify Username:	integration		
	Vertify Password:	***************************************		
	Vertify URL:	https://first-test-integrate.playground.vertify.com/Agent/Lis		
	Enable logging			
	Connect R	egister		
-Se	ervice Management			
-Se	ervice Management Start St	top Install Uninstall		
Se	ervice Management	op Install Uninstall		
-Se	ervice Management	top Install Uninstall		
_Se	ervice Management	op Install Uninstall		
Ins	ervice Management Start St tall service is done, exit (arted service	code 0		
-Se Ins Sta Atto	arvice Management Start St tall service is done, exit of arted service empting to contact web	cop Install Uninstall		
Ins Sta Attu Ho SU	tall service is done, exit of atrase is first-test-integrate of the strate of the stra	top Install Uninstall code 0 services, please wait ate. playground. vertify. com / https://agentws-test-integrate. playground. vertify. com/AgentWe	*bService.as	mx
Ins Sta Atte SU SU	tall service is done, exit start St start St start service empting to contact web stname is first-test-integr CCESS got status OK fo CCESS got status OK fo	top Install Uninstall code 0 services, please wait ste.plaground.vertify.com thtps://aqentws-test-integrate.playground.vertify.com/AgentWe thtps://enginews-test-	ebService.as	mx

7. Once "Register" is clicked, you should see another success message. When you refresh the Agent screen within Vertify, you will now see the Agent listed with its status.

-0	Vertify Agent Configu	ration -	-		×
	Configuration Friendly Agent Name: Vertify Username:	AgentDemo			
	Vertify Password: Vertify URL:	**************************************	is		
	Connect	egister			
	Service Management				
	Start St	op Install Uninstall			
	nstall service is done, exit of Started service Attempting to contact web s Hostname is first-test-integra SUCCESS got status DK for SUCCESS got status DK for herarte.playround, vertiv SUCCESS got status DK for	code 0 services, please wait ate, playground. vertify.com r https://angentws-test-integrate, playground.vertify.com/Agen r https://enginews-test- com/EngineWebservice.asmy r https://ws-test-integrate, playground.vertify.com/WebService incom/EngineWebservice.asmy	ntWe	bService.a	asmx

8. When you refresh the Agent screen within Vertify, you will now see the Agent listed with its status.

Agent				Download	Agent
Active Archived Deleted				🕰 Archive 🏦 Del	ete
Local Agent Name		Agent Status	Last Poll	Installed on Computer	
AgentDemo	Edit	Started	6/11/2021 5:44 PM	EC2AMAZ-ISJNFRQ	
					(1) Total

Uninstall

If you need to install a new Agent or you will no longer need a previous installation, you may uninstall the Agent.

- First open the Vertify Agent Configuration. You can do so by going to "C:\Program Files (x86)\VertifyAgent" and clicking the VertifyAgentConfig.
- 2. Stop the Agent by clicking "Stop" in the Service management section.

	💿 Vertify Agent Configura	ition —	×
	Configuration		
-aLD	Friendly Agent Name:	AgentDemo	
	Vertify Username:	integration	
3100	Vertify Password:		
yAg	Vertify URL:	$\left[https://first-test-integrate.playground.vertify.com/Agent/Lis \right]$	
	🗹 Enable logging		
	Connect	gister	
	Service Management		
	Start Sto	P Install Uninstall	
	Service is running Stopped service		
	1		

Once Stopped, click "Uninstall". You should see a message that the uninstall was successful

 NOTE: If it isn't successful, contact Customer Success or Support.

Configuration		
Friendly Agent Name:	AgentDemo	
Vertify Username:	integration	
Vertify Password:		
Vertify URL:	https://first-test-integrate.playground.vertify.com/Agent/Lis	
🗹 Enable logging		
Connect	Register	
ervice Management —		
ervice Management	Stop Install Install	
Service Management	Stop Install Uninstall	
Service Management	Stop Install Uninstall	
Service Management	Stop Install Uninstall	
Service Management	Stop Install Uninstall	
Service Management	Stop Install Uninstall exit code 0	
Service Management	Stop Install Uninstall exit code 0	
Service Management	Stop Install Uninstall exit code 0	
Service Management	Stop Install Uninstall	
Service Management	Stop Install Uninstall exit code 0	
Service Management	Stop Install Uninstall exit code 0	

4. Then, navigate to the list of installed programs on your device.



5. Search for the Vertify Agent.

Apps & features

Manage optional features

Manage app execution aliases

Search, sort, and filter by drive. If you would like to uninstall or move an app, select it from the list.

Ve	ertify	×	
Sor	t by: Name 🗸	Filter by: All drives \smallsetminus	
	Vertify Agent		5.47 MB 6/11/2021

6. Double Click the Vertify Agent and click "Uninstall".



7. Click "OK" when prompted to permanently remove the Vertify Agent.

	5.47 MB					
	VertifyAgent Uninstall					
	Permanantly remove Vertify Agent?					
No	OK Cancel					

8. Once Completed, click "Close". The program files will now no longer exist on the PC.

/e	🗃 VertifyAgent Uninstall: Completed	_		\times
_				
_	Show details			
۰b				
;	1			
้าล	Cancel Vertify, Inc. 2021	< Back	Clos	se

9. The Agent will remain in the list within Vertify, but it will show that it has stopped.

5			<i>,</i> ,		1.1	
🗮 Workspaces	Environments	🕰 Agents				
Agent					I	Download Agent
Active Archived	Deleted				-	Archive 🏦 Delete 🛛
Local Agent Nam	ie		Agent Status	Last Poll	Installed on Computer	
AgentDemo		Edit	Stopped	6/11/2021 5:55 PM	EC2AMAZ-ISJNFRQ	
						(1) Total

Logging

Logging can be enabled and disabled during troubleshooting. Support or Customer Success may request that you enable logging on your Agent.

1. You can do so by going to C:\Program Files (x86)\VertifyAgent and clicking the VertifyAgentConfig.

	📙 🛃 🔜 🛨	Manage	VertifyAgent					
	File Home Share View	Application Tools						
	← → 👻 🛧 📙 C:\Program Fil	es (x86)\VertifyAgent						
	Name		Date n	nodified	Type	^	Size	
	🖈 Quick access	inines	6/11/2	021 5-43 PM	File folde	5 F		
	🛄 Desktop 💉 🔂 Ve	rtifyLogs	6/11/2	021 5:48 PM	File folde	er		
	🟥 Documents 💉 🛶 🗛	gentService	6/11/2	021 2:49 PM	Applicat	ion		447 KB
	🕂 Downloads 💉 👔 ur	hinsts!!	6/11/2	021 5:37 PM	Applicat	ion		39 KB
	📰 Pictures 🕺 🗸 🌀 Ve	rtifyAgentConfig	6/11/2	021 2:49 PM	Applicat	ion		225 KB
	This PC	NISEDIA Come dill	0/11/2 179179	021 2:49 PIVI	Applicat	ion extens		
Then cli	ck "Enable Loggin	a"						
		9.				_		
	Vertify Agent Configurat	ion			_		×	
	Configuration							
	Friendly Agent Name:	AgentDemo						E.
	Vertifu Lleerneme:	integration						
	verally osemaine.	Integration						
	Vertify Password:							
	Vertify URL:	https://first-test-integr	ate.playground.vertif	y.com/Ageni	t/Lis			
	🗹 Enable logging							
	Connect Regi	ster						
	Service Management							
	Start Stop	Install	Uninstall					
	Service is running							
	Service is running							
	Service is running							
	Service is running							
	Service is running							
	Service is running							
	Service is running							
	Service is running							
	Service is running							
	Service is running							

3. Now you will see log files are being populated in the C:\Program Files (x86)\VertifyAgent\VertifyLogs. Support or Customer Success may ask for these files to be sent to us. Be sure to uncheck the box once

troubleshooting is complete; otherwise, these files will continue to be populated.



OPTIONAL USER ACCOUNT SETUP

- 1. Create a local Windows user account for the Vertify Agent.
 - i. NOTE: If the Agent needs access to a networked resource, it is recommended that you create a user on your domain instead of a local Windows user account contact your network administrator for assistance.
 - b. From the Start Menu, search Computer and choose "Computer Management". The Computer Management window will appear.

Computer Management Desktop app
Apps
Control Panel
Component Services
🐌 This PC
Settings

- c. Expand "Configuration" (or "System Tools"), then expand Local Users and Groups.
- d. Right-click the Users folder and choose "New User".



e. Enter a username and password. Uncheck the box "User must change password at next logon". It is recommended that you check the box "User cannot change password" and "Password never expires".

i. NOTE: If you allow the password to expire, your Agent may stop operating unless you change the password and reconfigure the Agent to use the new password.

🔚 Computer Management			
File Action View Help			
🗢 🏟 🙇 📊 🧟 🗟			
 Computer Management (Local System Tools Task Scheduler Event Viewer Shared Folders Local Users and Groups Operformance Device Manager Storage Windows Server Backup Disk Management Services and Applications 	Name New User User name: Full name: Description: Password: Confirm password User must ch User must ch User cannot Password ne Account is di	Full Name	Description ? X

- f. Click "Create" to create the new user and then click "Close" to close the dialog box.
- g. Close the "Computer Management" window.

- 2. Assign full permissions on the "C:\Program Files (x86)\VertifyAgent\Engines'' folder to the newly created user. This allows the Agent to automatically update itself when new versions are released.
 - a. From the Start Menu, choose "Computer". Navigate to the "C:\Program Files (x86)\VertifyAgent" folder. Right click the "Engines" folder and choose "Properties". A Properties dialog will appear.
 - i. NOTE: If this computer is a 32-bit machine, the Program Files folder will not have "(x86)" appended to it.



b. Click the Security tab, then click "Edit" to change permissions. A Permissions dialog will appear.

🚶 Engines Properties 📃
General Sharing Security Previous Versions Customize
Object name: C:\Program Files (x86)\The New Office\Muv Agent
Group or user names:
SICREATOR OWNER
SYSTEM
Muy Agent (VCL-Eagles\muvagent)
Administratore (VCL_Eagles) Administratore)
To change permissions, click Edit.
Permissions for CREATOR
OWNER Allow Deny
Full control
Modify
Read & execute
List folder contents
Read
Write
For special permissions or advanced settings, Advanced Advanced
Learn about access control and permissions
OK Cancel Apply

c. Click "Add" to add a new user.

🗼 Permissions for Engines		×
Security		
Object name: C:\Program Files (x)	86)\The New Offi	ice∖Muv Agent
Group or user names:		
Secretarian Contraction Contraction		
& SYSTEM		
& Administrators (VCL-Eagles \Adr	ministrators)	
& Users (VCL-Eagles\Users)		
StrustedInstaller		
Permissions for CREATO	A <u>d</u> d	Remove
OWNER	Allow	Deny
Full control		A 1
Modify		
Read & execute		
List folder contents		
Read		
Learn about access control and per	missions	
ОК	Cancel	Apply

- d. Enter the username of the newly created user and click "OK".
 - i. NOTE: You may have to change your location to find the user click the "Locations" button to do so.

Select Users or Groups		×
Select this object type:		
Users, Groups, or Built-in security principals		Object Types
From this location:		\frown
ODBC-AGENT-SHR2		Locations
Enter the object names to select (<u>examples</u>):		
VertifyAgent		Check Names
Advanced	ОК	Cancel

e. The new user will appear in the list on the Permissions dialog. Highlight the user and then check the "Allow" box for "Full control". This will automatically check all Permissions under the "Allow" column. Click "OK" to save your changes and close the Permissions dialog box.

Permissions for Engines		×
Security		
Object name: C:\Program Files	(x86)\VertifyAgen	it\Engines
Group or user names:		
SYSTEM		^
Administrators (ODBC-AGEN	T-SHR2\Administ	rators)
Users (UDBI: Alie NT, SHB2	AU Isers	
VertifyAgent (ODBC-AGENT-	-SHR2\VertifyAge	ent)
	, , ,	
	Add	Perroue
	A00	heiliove
Permissions for VertifyAgent	Allow	Deny
Full control		
Modify		
Read & execute		
List folder contents		
Read		
L		

- f. Click "OK" to close the Properties dialog box.
- 3. Change the Vertify Agent Windows service to run using the newly created user.
 - a. From the Start Menu, search Computer and choose "Computer Management". The Computer Management window will appear.



b. Expand "Configuration" (or "Services and Applications"), then click "Services". A list of services will appear to the right.

Services					
Vertify Agent	Name	Description	Status	Startup Type	Log
Chan the service	🎑 Telephony	Provides Tel		Manual	Net
Stop the service	🎑 Themes	Provides us	Running	Automatic	Loc
inestant the service	🎑 Time Broker	Coordinates	Running	Manual (Trig	Loc
	🎑 Touch Keyboard and Hand	Enables Tou	Running	Manual (Trig	Loc
	🌼 Update Orchestrator Service	Manages W	Running	Automatic (D	Loc
	🎑 UPnP Device Host	Allows UPn		Disabled	Loc
	🎑 User Access Logging Service	This service	Running	Automatic (D	Loc
	🎑 User Data Access_29522	Provides ap		Manual	Loc
	🎑 User Data Storage_29522	Handles sto		Manual	Loc
	🤹 User Experience Virtualizatio	Provides su		Disabled	Loc
	🎑 User Manager	User Manag	Running	Automatic (T	Loc
	Oser Profile Service	This service	Running	Automatic	Loc
	🔍 Vertify Agent		Running	Automatic	Loc
	Signature Disk	Provides m		Manual	Loc
	🖾 Volume Shadow Conv	Manages an		Manual	Loc

c. Locate the "Vertify Agent" service and double-click. The Properties dialog will appear. Click the "Stop" button to stop the Agent.

Vertify Agent Prop	erties (Local Computer)	×
General Log On	Recovery Dependencies	
Service name:	VertifyAgent	
Display name:	Vertify Agent	
Description:	\$\$	
Path to executabl C:\Program Files (le: (x86)\VertifyAgent\AgentService.exe	
Startup type:	Automatic ~	
Service status: Start	Running Stop Pause Resume	
from here.	ne start parameters that apply when you start the service	
Start parameters:]
	OK Cancel Apply	

d. Click the "Logon" tab. Select the option "This account" and then click the "Browse" button.

Vertify Agent Properties (Local Computer)	×
General Log On Recov	very Dependencies	
Log on as:		
O Local System accoun	t	
Allow service to in	teract with desktop	\square
This account:		Browse
Password:	•••••	
Confirm password:	•••••	
	OK Cano	el Apply

- e. Enter the username of the newly created user and click "OK".
 - i. NOTE: You may have to change your location to find the user click the "Locations" button to do so.

Select User	×
Select this object type:	
User or Built-in security principal	Object Types
From this location:	
ODBC-AGENT-SHR2	Locations
Fixer the object name to select (<u>examples</u>):	
VertifyAgent	Check Names
Advanced OK	Cancel

- f. Enter the newly created user's password in the Password and Confirm Password boxes. Click "Apply" to save your changes.
 - i. NOTE: Windows will automatically grant this user the "Log on as a service" right after clicking Apply so it can run the Agent.

Vertify Agent Properties (Local Computer)				
General Log On Rec	overy Dependencies			
Log on as:				
Local System accouncil Allow service to intervice to intervice.	interact with desktop			
This account:	.\VertifyAgent	Browse		
Password:	•••••			
Confirm password:	•••••			
	OK Canc	el Apply		

g. Click the "General" tab and then click the "Start" button to restart the Agent. The Agent is now running using the new credentials.

Vertify Ager	nt Prop	erties (Loca	l Computei)		×
General L	og On	Recovery	Dependenc	ies		
Service n	ame:	VertifyAger	ıt			
Display na	ime:	Vertify Age	nt			
Descriptio	n:					$\hat{}$
Path to ex C:\Progra	ecutabl m Files (e: x86)\Vertify4	igent\Agent	Service.exe		-
Startup typ	oe:	Automatic				\sim
Service st Sta You can s from here. Start para	atus: nt pecify tł meters:	Stopped Stop	meters that a	Pause pply when yo	Resume u start the servi	ce
			OK	Cano	el Ap	ply

- 4. Verify the Agent is connecting to Vertify using the new credentials through the Vertify UI.
 - a. Login to Vertify.
 - b. Click "Workspaces" and then click "Agents" to view the list of Agents.
 - c. Locate the Agent you just changed and verify the "Agent Status" says "Started".
 - i. Note that it may take up to 10 seconds for the status to change to "Started" after starting the Agent Service. If after a minute it does not change to "Started", an error may have occurred. Check the Application Event Log for details.

Agent				Downloa	ad Agent
Active Archived Deleted				Archive	Delete
Local Agent Name		Agent Status	Last Poll	Installed on Computer	
WIN81A-TD01-A	Edit	Stopped	5/06/2021 8:51 AM	WIN81A	
ODBC-AGENT-SHR2a	Edit	Stopped	5/17/2021 11:32 AM	ODBC-AGENT-SHR2	
ODBC-AGENT-SHR2b	Edit	Started	5/21/2021 11:48 AM	ODBC-AGENT-SHR2	
AGENT-TEMP-1	Edit	Started	5/21/2021 11:48 AM	AGENT-TEMP-1	
					(4) T-4-1

- 5. Assign permissions to the newly created user on the system you are integrating.
 - a. This step requires knowledge of the system you are integrating with and/or your network security. Contact your network and/or application administrator for assistance.
 - i. NOTE: If the application does not use Windows user credentials for access, then you will be prompted for these credentials when you connect to the system using Vertify. In this case, you just need to make sure that the Windows user has the correct permissions to access the system you are integrating with, and the Vertify Agent will pass through the application credentials.

Example: Granting access to the Vertify Agent to local SQL Server database

Below is an example of granting access to a local Windows user to a SQL Server database. *In this example, FULL access is granted on the database to the user running the Vertify Agent. Contact your SQL Server administrator for assistance in providing restricted access to a SQL Server database.*

- I. Open the SQL Server Management Studio and login to the database server.
- II. Expand the "Security" folder. Right-click the "Logins" folder and choose "New Login".



III. Click the "Search" button next to Login Name.

📕 Login - New		– 🗆 ×
Select a page General	🖵 Script 🔻 😮 Help	\sim
 Server Roles User Mapping Securables Status 	Login name: Windows authentication SQL Server authentication	Search
	Password: Confirm password: Specify old password Old password: Chronic password policy	

- IV. A new dialog will appear. Enter the username of the newly created user and click "OK".
 - i. NOTE: You may have to change your location to find the user click the "Locations" button to do so.

Select User	×
Select this object type: User or Built-in security principal	Object Types
From this location:	
Even the object name to select (<u>examples</u>):	Locations
VertifyAgent	Check Names
Advanced OK	Cancel

V. Select the page "User Mapping" on the left. Locate and check the box next to the desired database and check the box next to the "db_owner" role below. *This will grant the Vertify Agent user FULL access to this database. Contact your SQL Server administrator for assistance in providing restricted access to a SQL Server database.*

Login - New					
Select a page	C Script	* D Help			
General	3	10 miles			
Jerver Holes	Lines and	ronad to this locin:			
Securables	Mac.	Database	Haz	Default Sohema	
Status	Map	Database	User	Derduk Schema	
		model			
	100	model			
	1	NSLocalDB	VCL-EAGLES\muvag		
	1	ODBCSampleLaw on			
		ODBCSampleNS			
		ODBCSampleSF			=
		SRoNS2			
		tempdb			
					*
Connection	Databas	t account enabled for: NSL e tole membership for: NSL	ocalD8		
Court	🔄 db_a	ccessadmin			
Server.	dbb	ackupoperator latareader			
Connection:	db_d	atawriter			
AUSTIN\art.ardolino	_ db_d	dladmin			
Wew connection properties	0.0	enydatareader enydatawise			_
Progress	(de s				
O Ready	V pube				
			C	OK	Cancel

VI. Click "OK" to save your changes and close the dialog.