



Verify Agent Setup Guide

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

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PURPOSE OF DOCUMENT

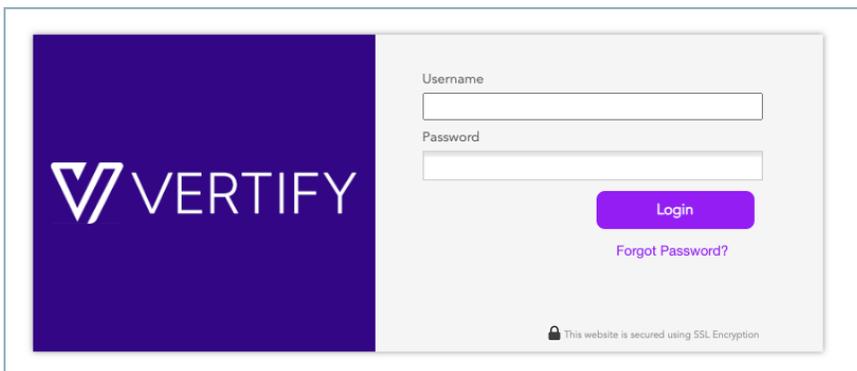
The Verify Agent is a Windows Service Application that allows Verify to integrate with on-premise systems. It communicates with the Verify Platform over a secure 128-bit SSL connection using the standard SSL port (443). It does not require any special configuration of your firewall. Once installed, the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

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

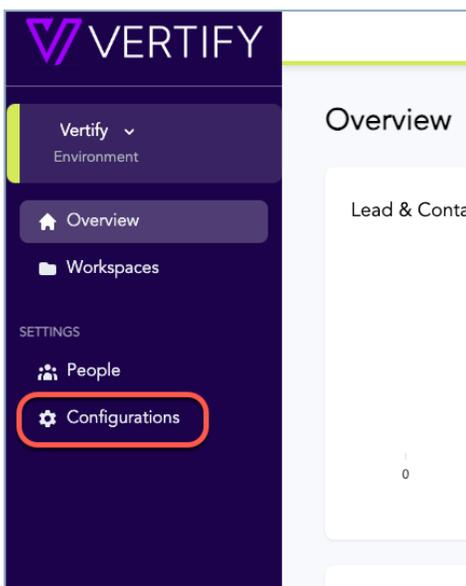
Installing the Agent

Downloading the Agent

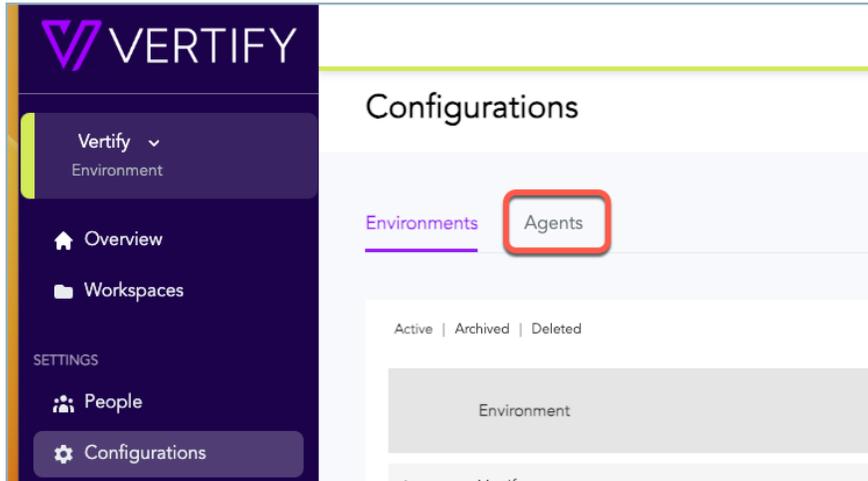
1. To install the Verify Agent, log into Verify with your credentials: [https://\[yourinstance\].\[your region: us, eu, or au\].verify.com](https://[yourinstance].[your region: us, eu, or au].verify.com)



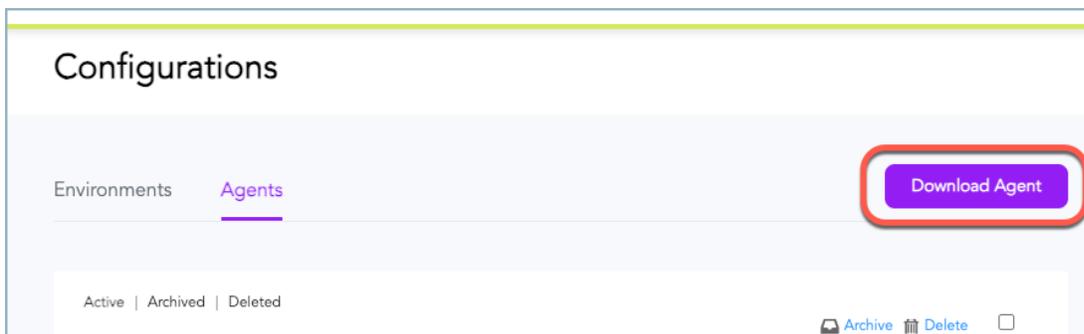
2. Go to the Configurations section.



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



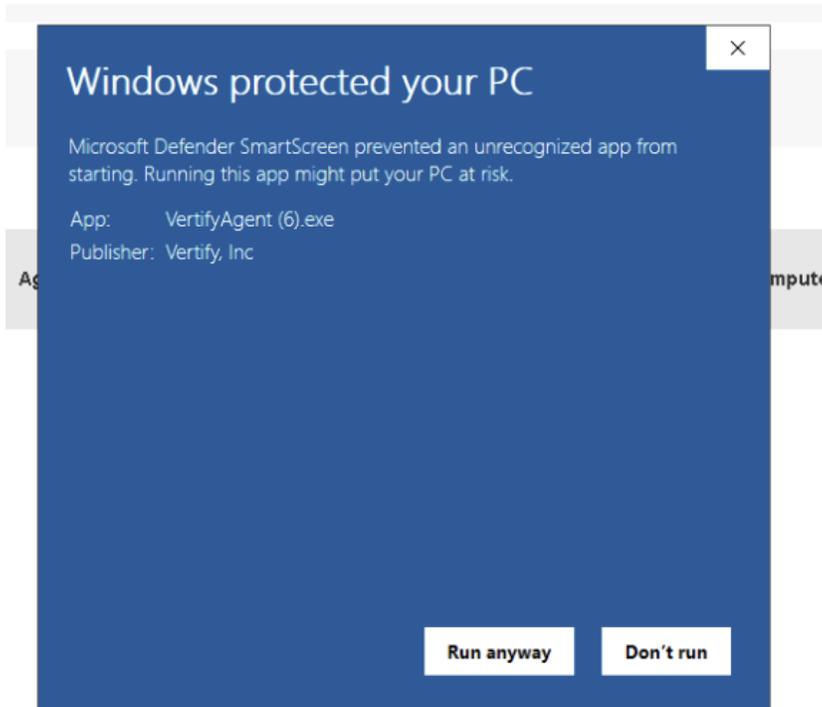
4. Click the Download Agent button. This will download an MSI file (Windows Installation File) that will guide you through the installation process.¹



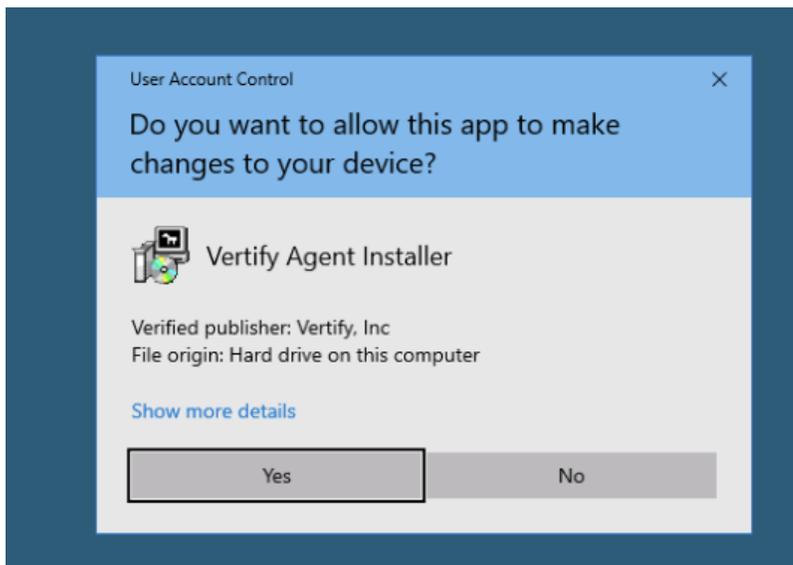
Install

1. After the VerifyAgent.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.

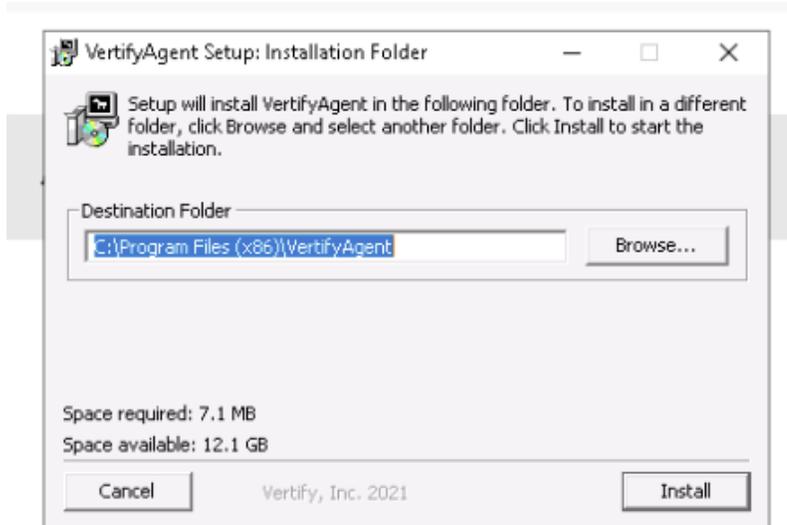
¹ By default, the Verify Agent runs using the local system account. This grants the Verify Agent full access to the computer it is installed on and its local resources. Most applications also grant this level of access to the local system account. This eliminates the need for any further configuration. If your security team requires that you run the service with a dedicated user account with minimum permissions see the [Optional User Account 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.



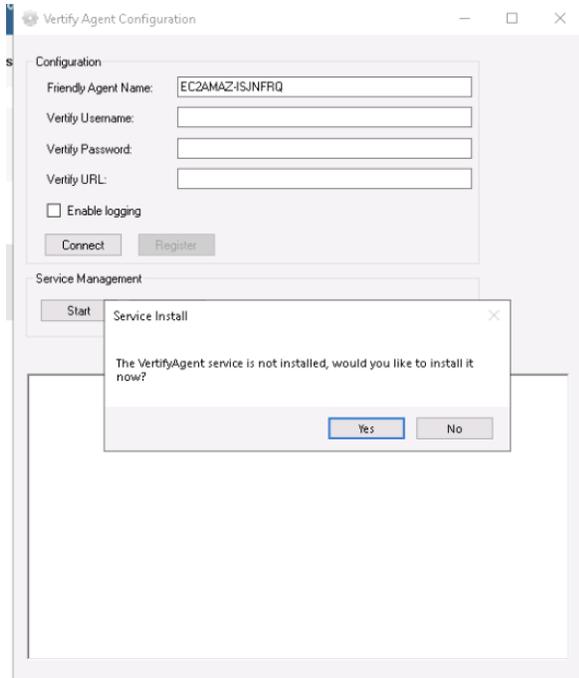
2. Another box will appear asking if you want to allow app to make changes. Click "yes".



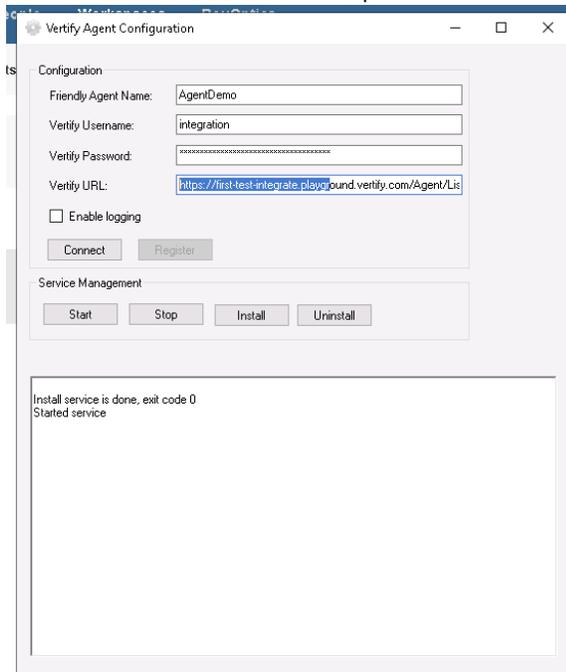
3. A default destination is then provided. Click "Install".



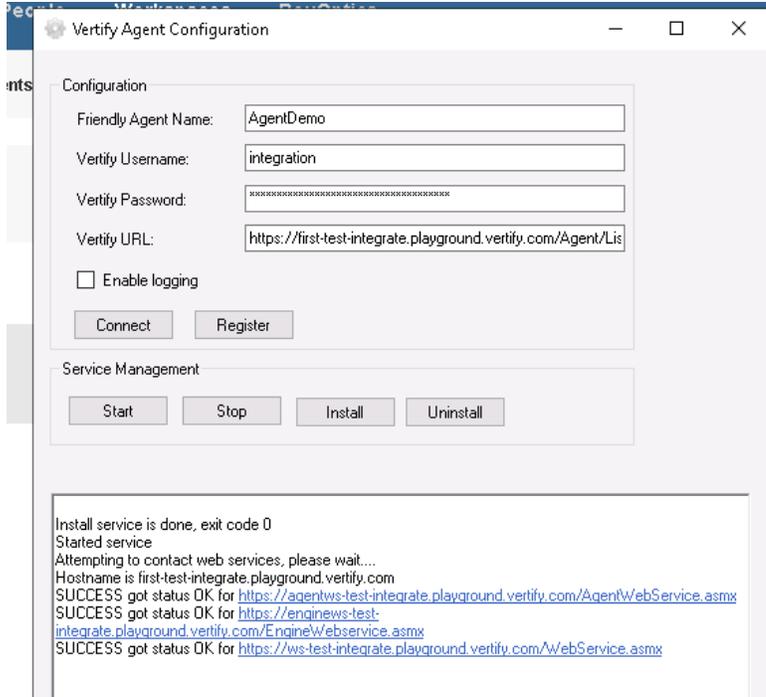
4. The Verify Agent Configuration should open automatically. Click "yes" when prompted to install the service.



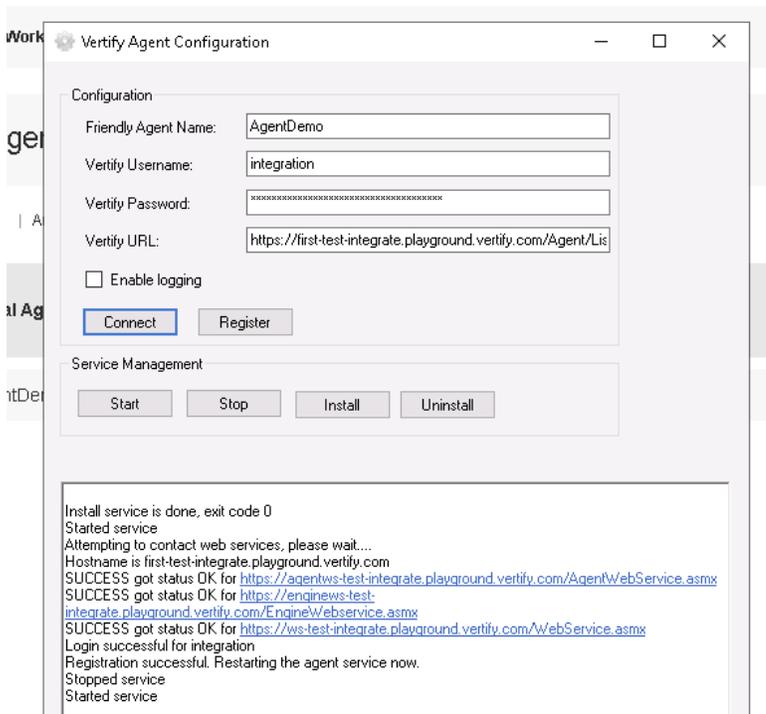
5. Once the installation is complete the service will start. Add your Verify login and URL in this step. You can name the Agent anything you like. Enable logging should be left unchecked; this will only be needed for debugging purposes. Once the login details are added, click "Connect".
 - a. NOTE: If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



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.



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



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

Agent

[Download Agent](#)

Active | [Archived](#) | [Deleted](#)

 [Archive](#)  [Delete](#)

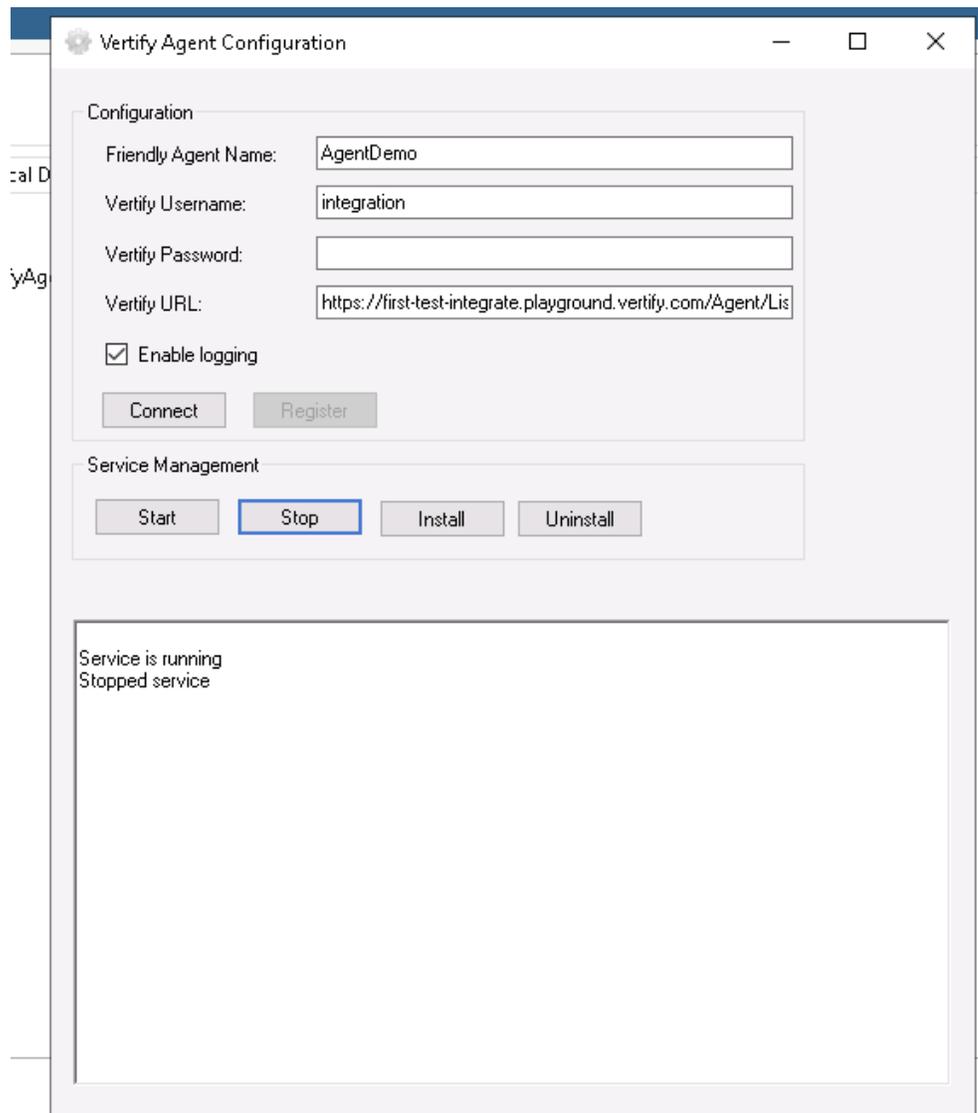
Local Agent Name	Agent Status	Last Poll	Installed on Computer
AgentDemo Edit	Started	6/11/2021 5:44 PM	EC2AMAZ-ISJNFRQ <input type="checkbox"/>

(1) Total

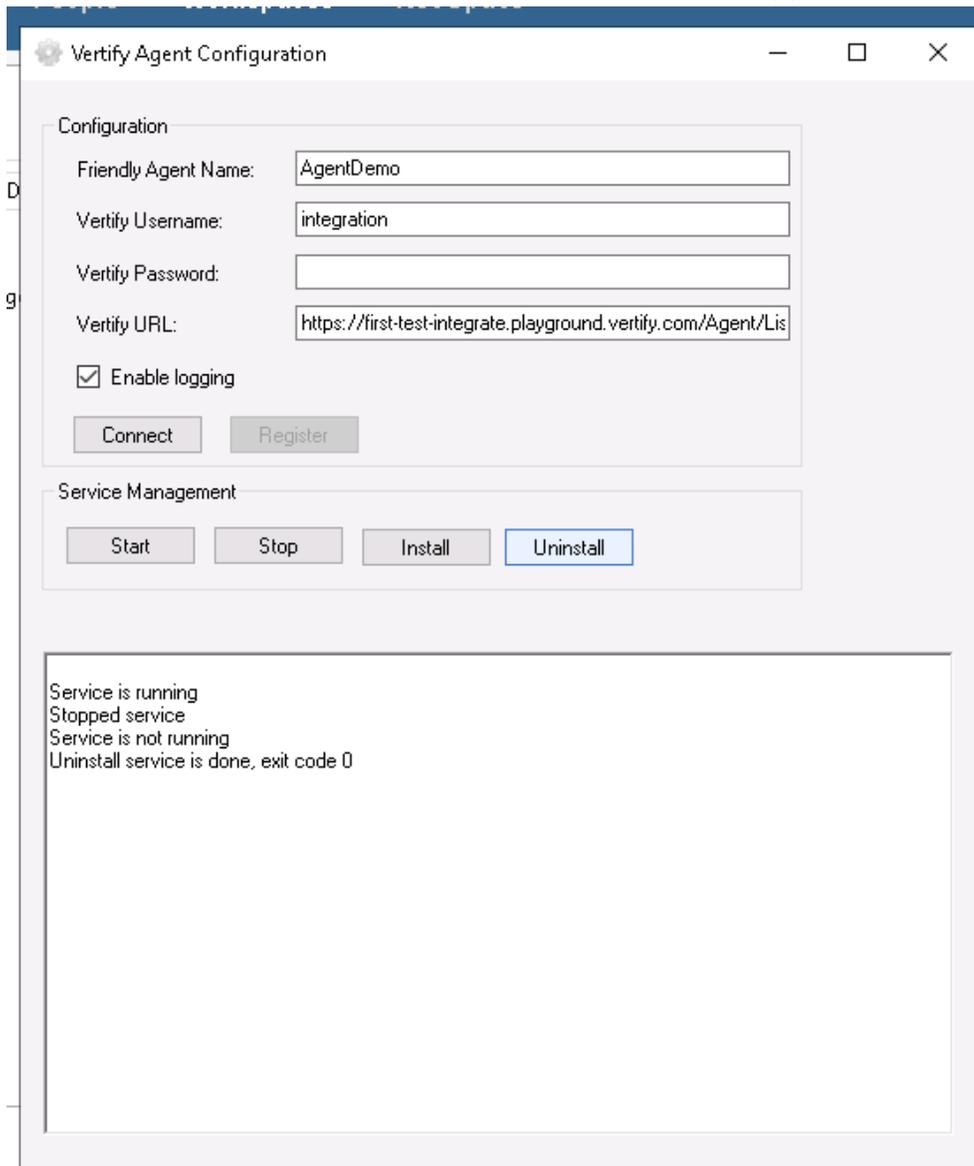
Uninstall

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

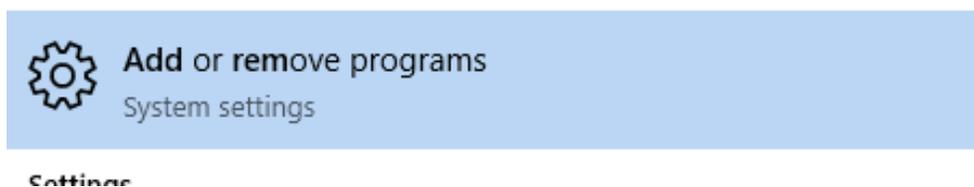
1. First open the Verify Agent Configuration. You can do so by going to “C:\Program Files (x86)\VerifyAgent” and clicking the VerifyAgentConfig.
2. Stop the Agent by clicking “Stop” in the Service management section.



- 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.



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



- Search for the Verify Agent.

Apps & features

[Manage optional features](#)

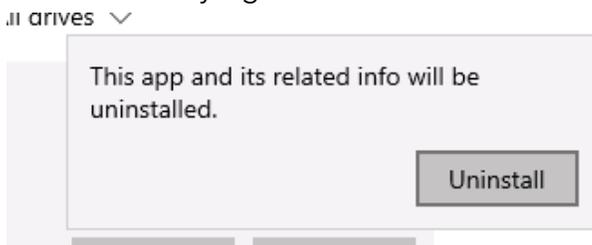
[Manage app execution aliases](#)

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

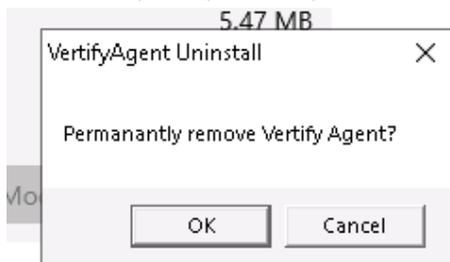
Sort by: Name ▾ Filter by: All drives ▾

	Verify Agent	5.47 MB 6/11/2021
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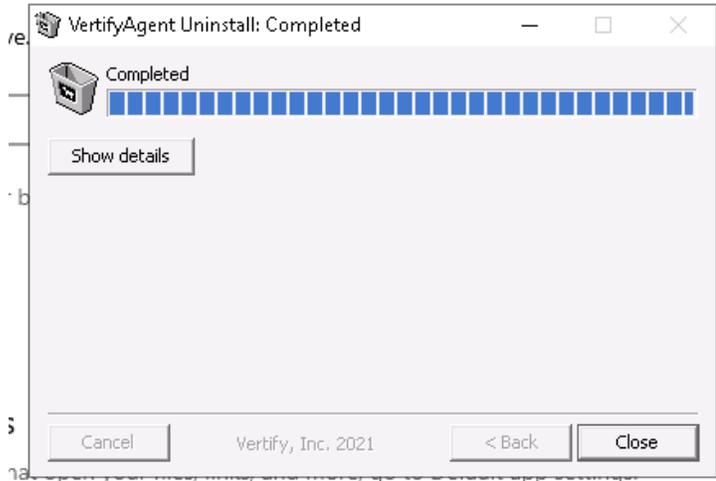
6. Double Click the Verify Agent and click "Uninstall".



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



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



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

Workspaces Environments Agents

Agent Download Agent

Active | Archived | Deleted Archive Delete

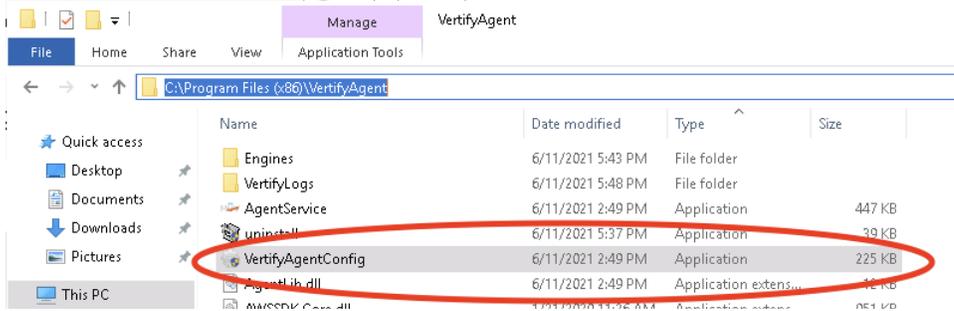
Local Agent Name	Agent Status	Last Poll	Installed on Computer
AgentDemo Edit	Stopped	6/11/2021 5:55 PM	EC2AMAZ-JSJNFRQ

(1) Total

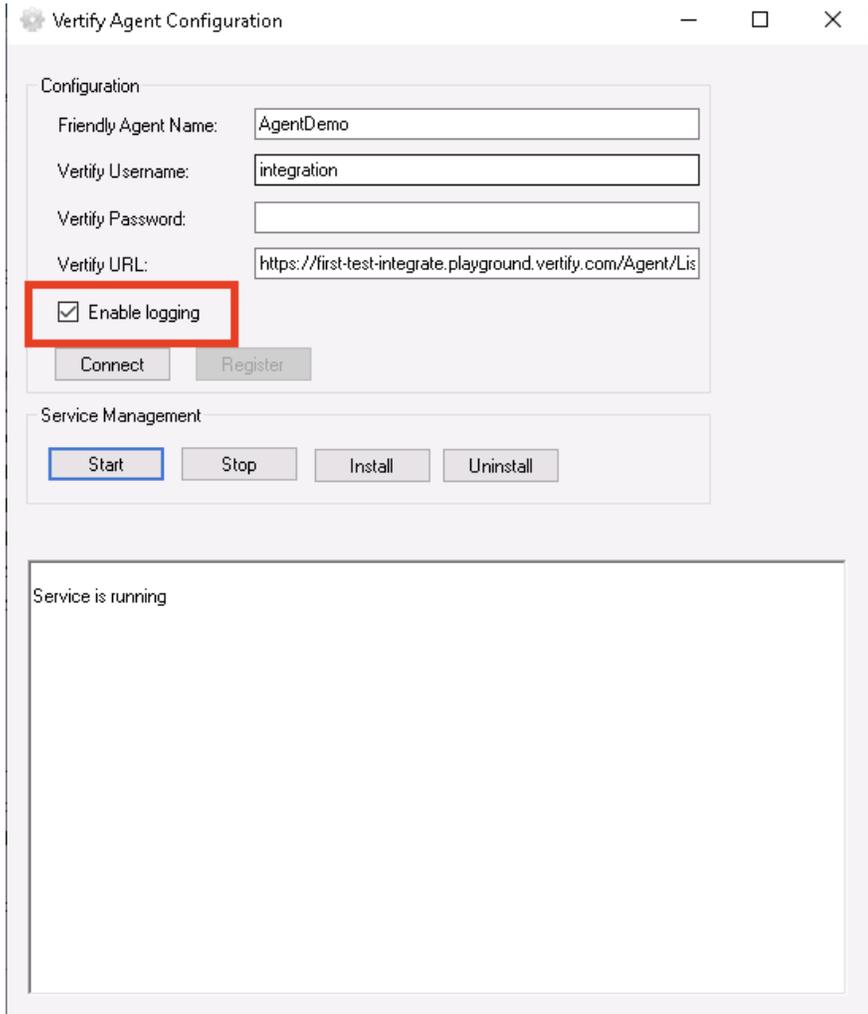
LOGGING

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)\VerifyAgent and clicking the VerifyAgentConfig.

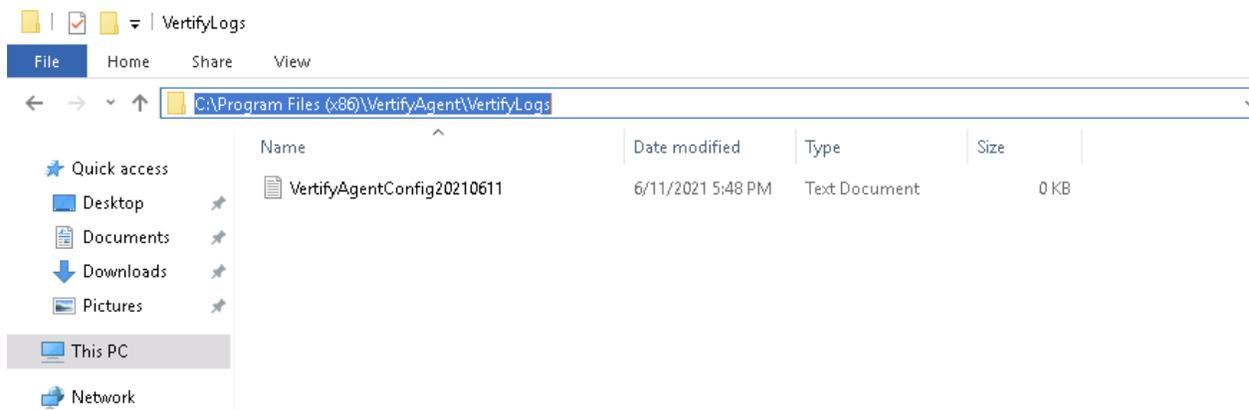


2. Then, click "Enable Logging".



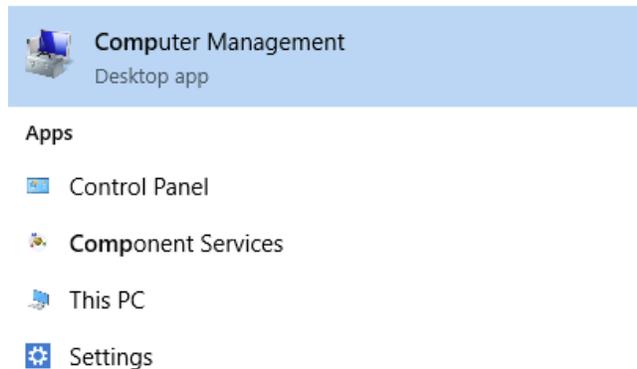
3. Now you will see log files are being populated in the C:\Program Files (x86)\VerifyAgent\VerifyLogs. Support or Customer Success may ask for these files to be sent to us. Be sure to uncheck the box once

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

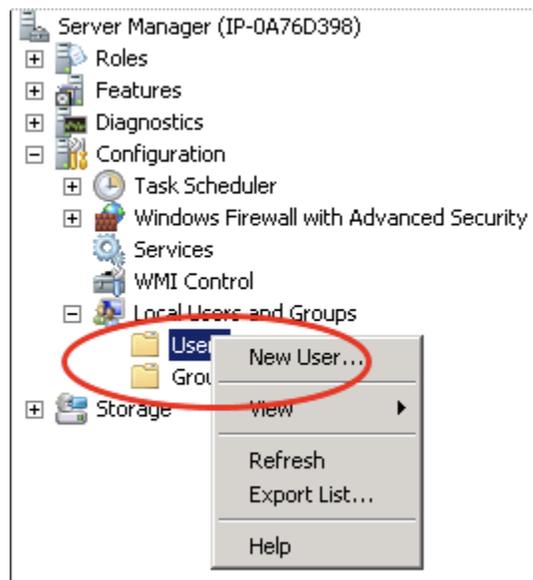


OPTIONAL USER ACCOUNT SETUP

1. Create a local Windows user account for the Verify 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.

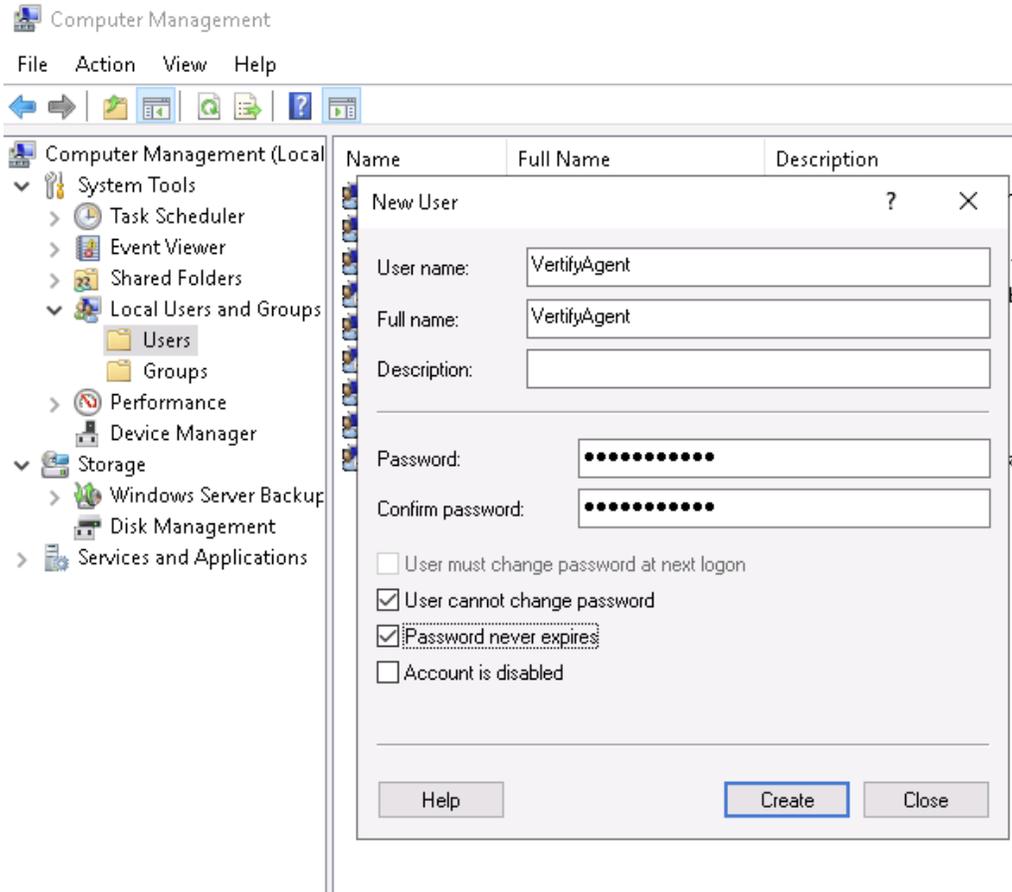


- c. Expand “Configuration” (or “System Tools”), then expand Local Users and Groups.
- d. Right-click the Users folder and choose “New User”.



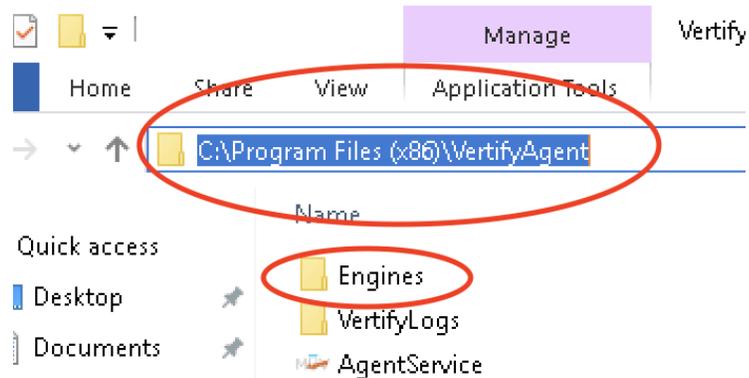
- e. Enter a username and password. Uncheck the box “User must change password at next logon”. It is recommended that you check the box “User cannot change password” and “Password never expires”.

- 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.

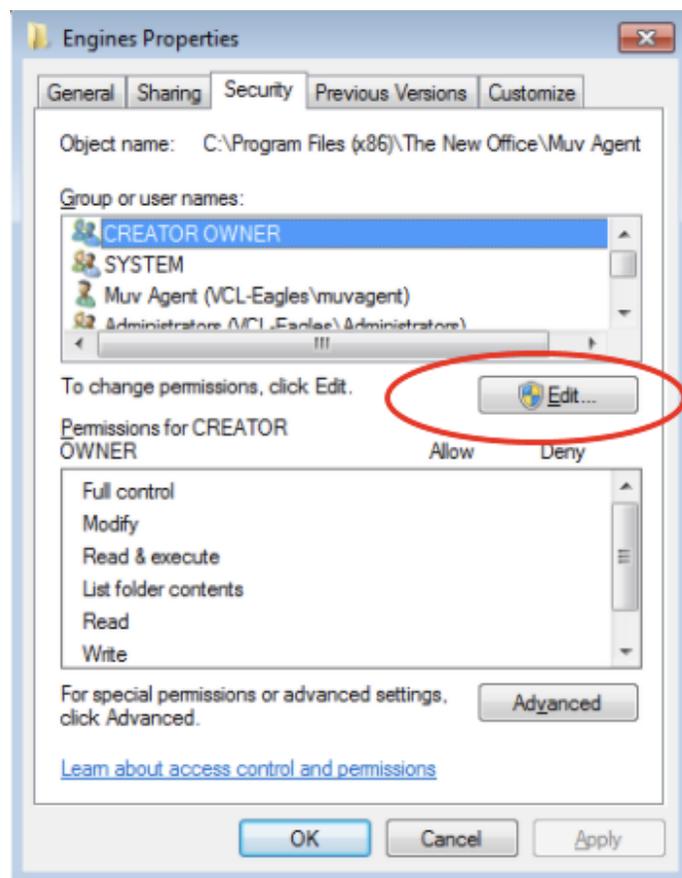


- f. Click "Create" to create the new user and then click "Close" to close the dialog box.
- g. Close the "Computer Management" window.

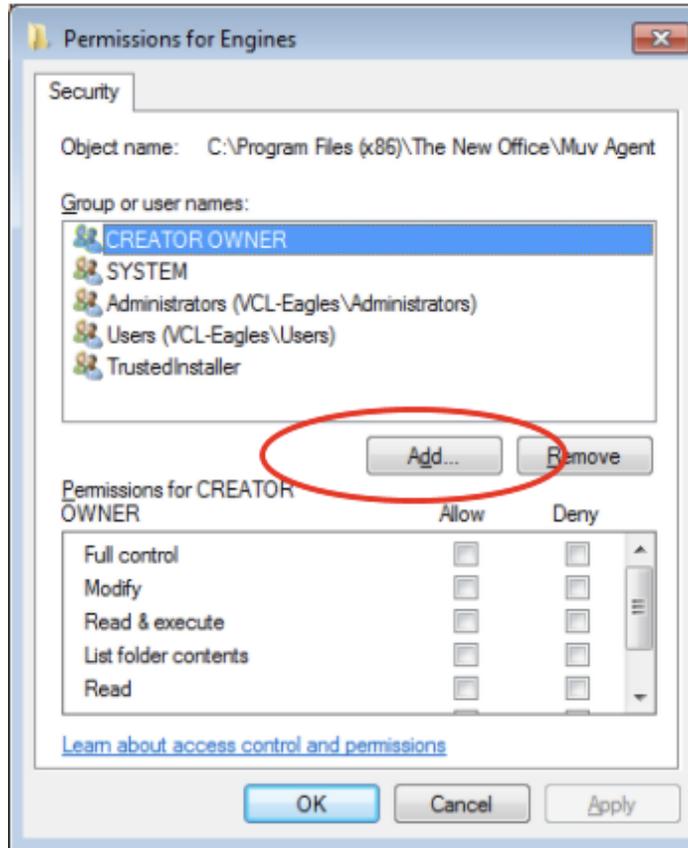
- 2. Assign full permissions on the "C:\Program Files (x86)\VerifyAgent\Engines" folder to the newly created user. This allows the Agent to automatically update itself when new versions are released.
 - a. From the Start Menu, choose "Computer". Navigate to the "C:\Program Files (x86)\VerifyAgent" folder. 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.



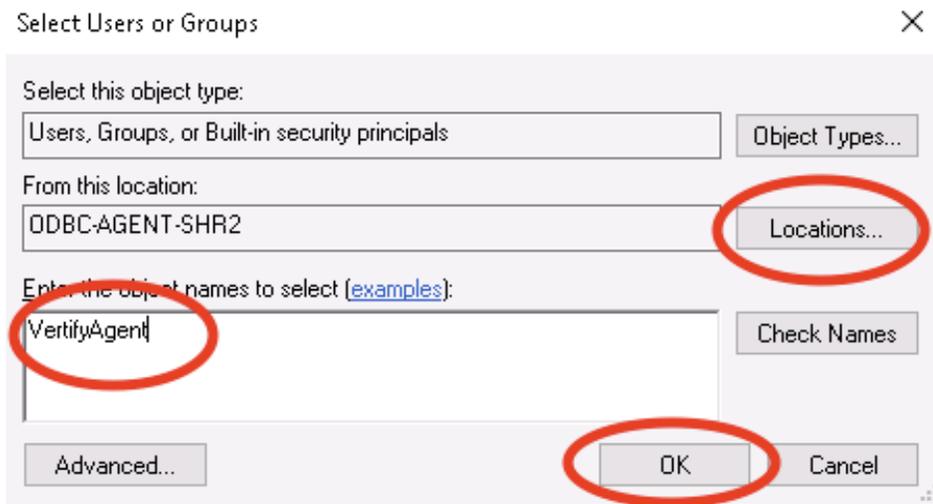
- b. Click the Security tab, then click "Edit" to change permissions. A Permissions dialog will appear.



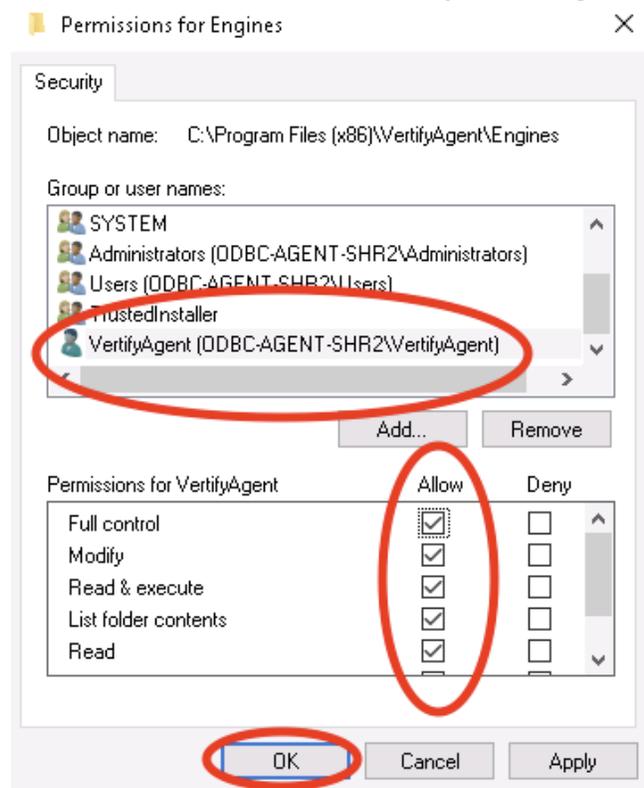
- c. Click "Add" to add a new user.



- 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.

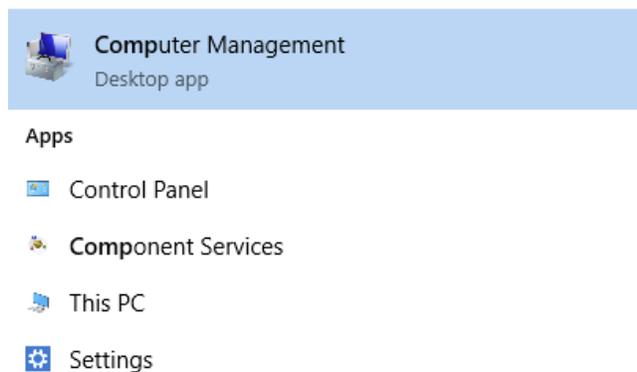


- e. The new user will appear in the list on the Permissions dialog. Highlight the user and then check the "Allow" box for "Full control". This will automatically check all Permissions under the "Allow" column. Click "OK" to save your changes and close the Permissions dialog box.

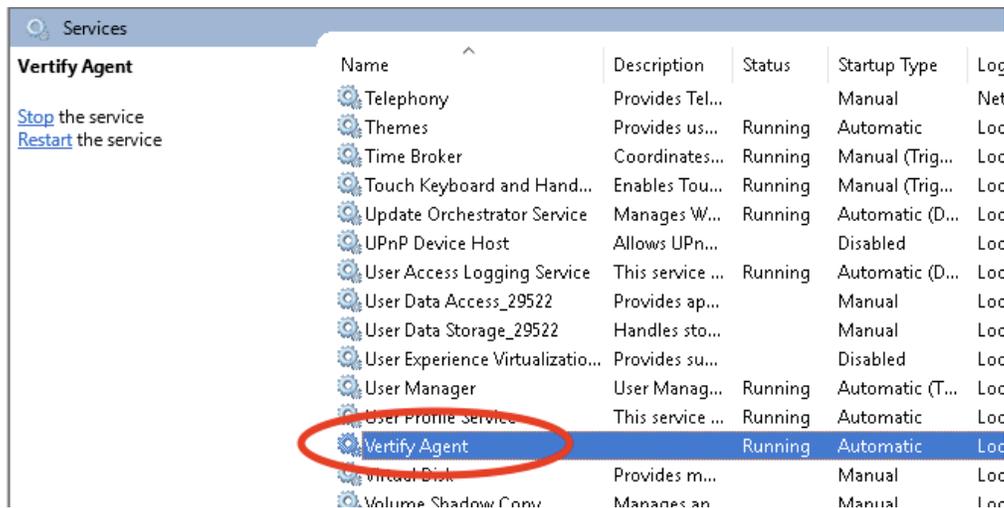


- f. Click "OK" to close the Properties dialog box.

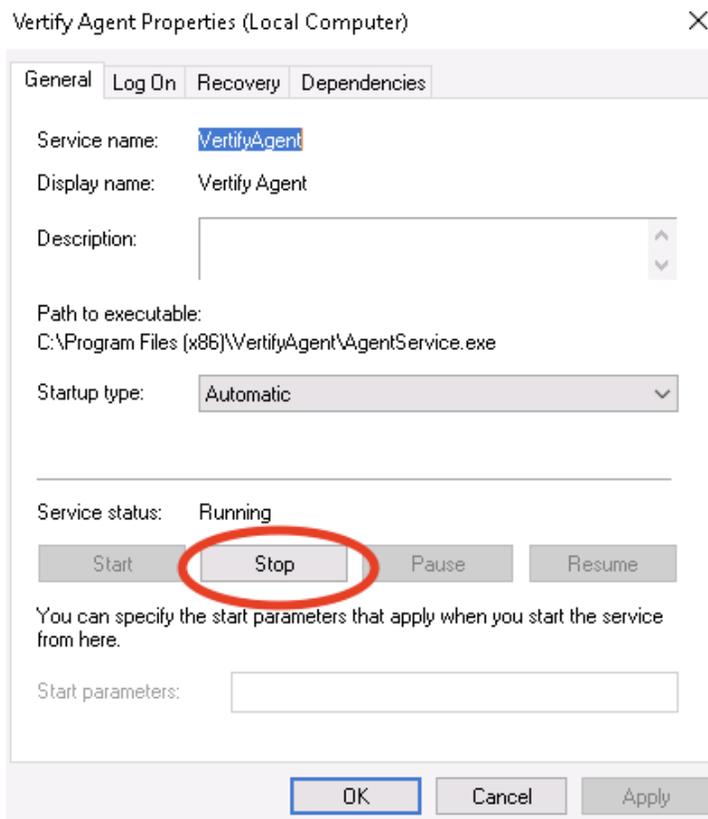
3. Change the Verify Agent Windows service to run using the newly created user.
- a. From the Start Menu, search Computer and choose "Computer Management". The Computer Management window will appear.



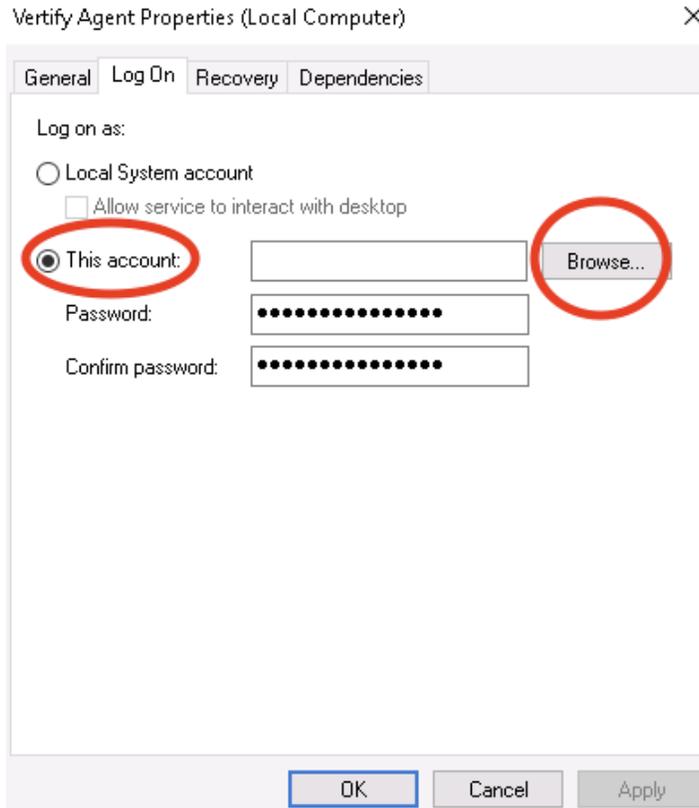
- b. Expand “Configuration” (or “Services and Applications”), then click “Services”. A list of services will appear to the right.



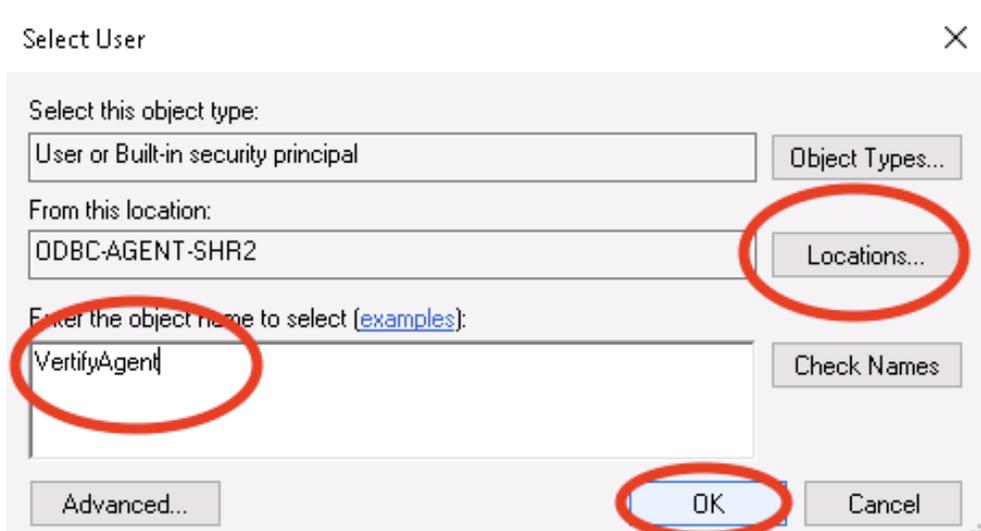
- c. Locate the “Verify Agent” service and double-click. The Properties dialog will appear. Click the “Stop” button to stop the Agent.



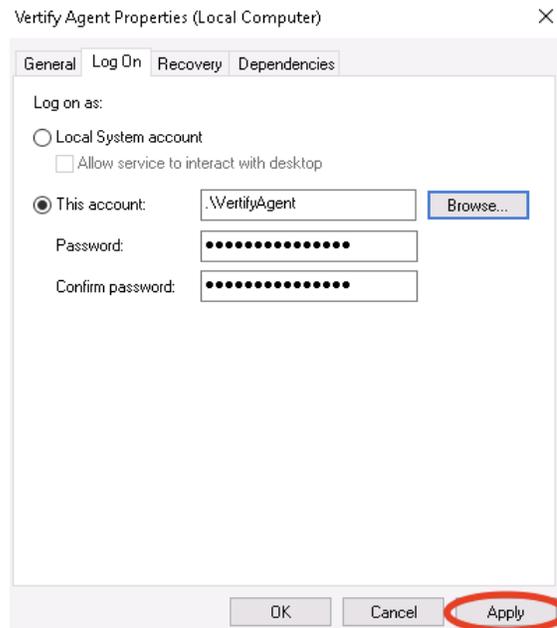
- d. Click the “Logon” tab. Select the option “This account” and then click the “Browse” button.



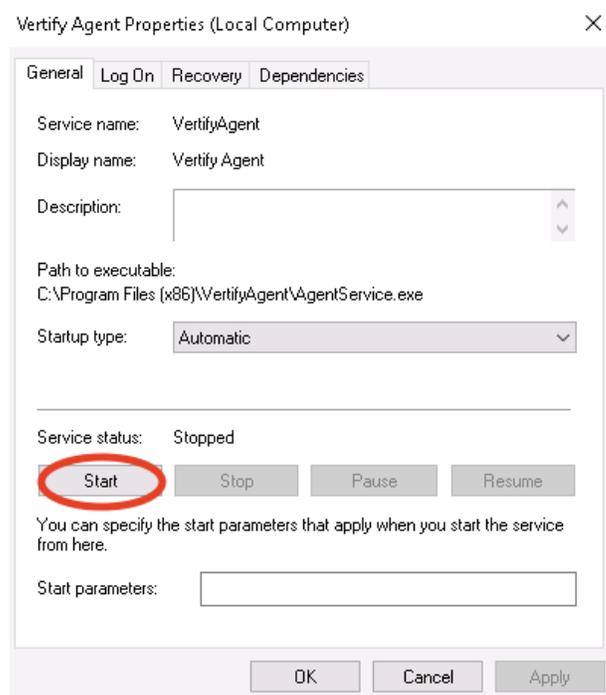
- e. Enter the username of the newly created user and click "OK".
 - i. NOTE: You may have to change your location to find the user – click the "Locations" button to do so.



- 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.



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



4. Verify the Agent is connecting to Verify using the new credentials through the Verify UI.
 - a. Login to Verify.
 - 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					Download Agent
Active Archived Deleted					Archive Delete <input type="checkbox"/>
Local Agent Name		Agent Status	Last Poll	Installed on Computer	
WIN81A-TD01-A	Edit	Stopped	5/06/2021 8:51 AM	WIN81A	<input type="checkbox"/>
ODBC-AGENT-SHR2a	Edit	Stopped	5/17/2021 11:32 AM	ODBC-AGENT-SHR2	<input type="checkbox"/>
ODBC-AGENT-SHR2b	Edit	Started	5/21/2021 11:48 AM	ODBC-AGENT-SHR2	<input type="checkbox"/>
AGENT-TEMP-1	Edit	Started	5/21/2021 11:48 AM	AGENT-TEMP-1	<input type="checkbox"/>

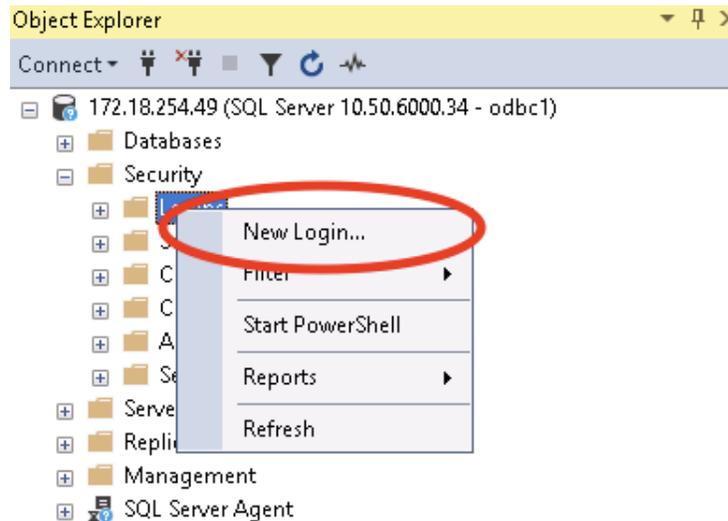
(4) Total

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 Verify. 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 Verify Agent will pass through the application credentials.

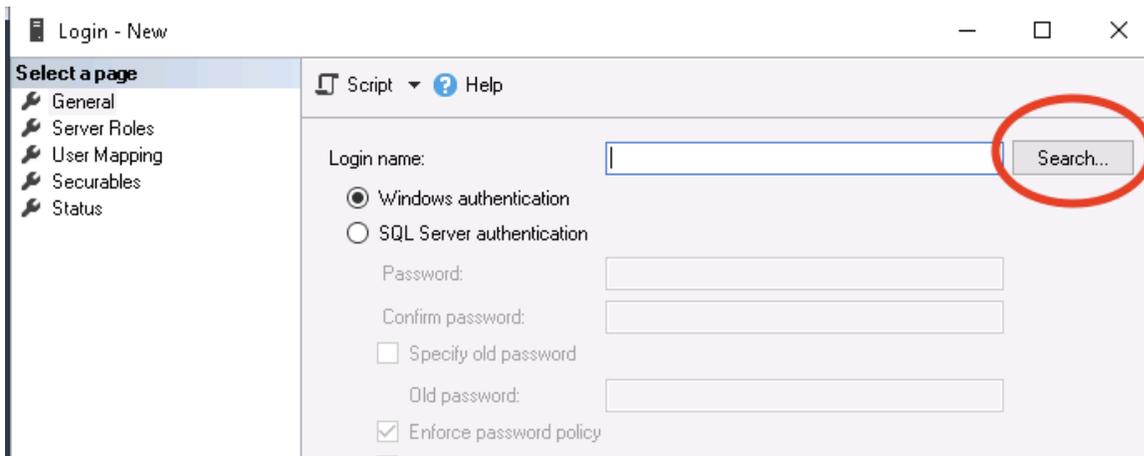
Example: Granting access to the Verify Agent to local SQL Server database

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 Verify Agent. Contact your SQL Server administrator for assistance in providing restricted access to a SQL Server database.*

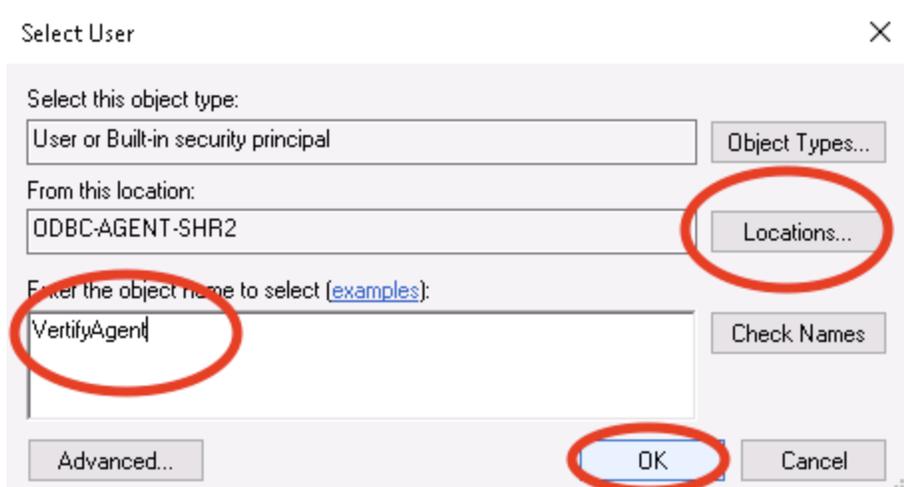
- I. Open the SQL Server Management Studio and login to the database server.
- II. Expand the "Security" folder. Right-click the "Logins" folder and choose "New Login".



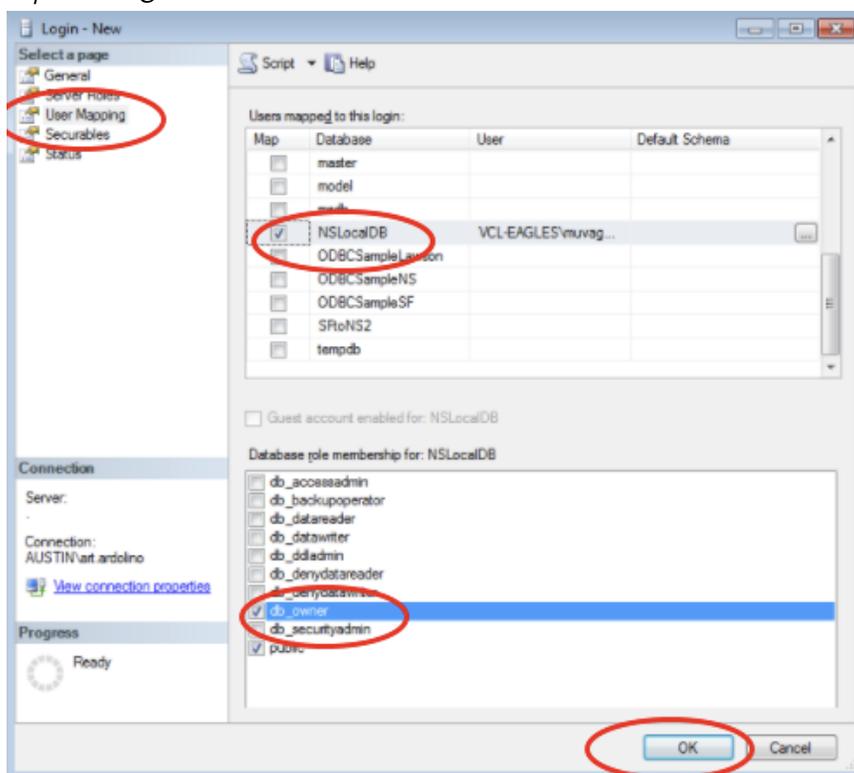
- III. Click the "Search" button next to Login Name.



- 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.



- 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 Verify Agent user FULL access to this database. Contact your SQL Server administrator for assistance in providing restricted access to a SQL Server database.*



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