OAISYS Administration Guide

VERSION 8.0

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Americas Headquarters

OAISYS

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CONTENTS

INTRODUCTION

This document serves as an Administrator's Guide for the OAISYS Recording Solutions system. It provides procedures for setting up and customizing your system, and for programming everyday tasks you perform to capitalize on the flexibility of your system.

Prior to using this guide, you should become familiar with the [Technical Specification](#) requirements found online.

The target audience for this document includes network engineers, system administrators, installation technicians, or telecom engineers. The reader is expected to have a sufficient computer networking and telephony background.

Some readers may need to reference only a small portion of the information provided; others may need most of the information provided before understanding how to tailor the OAISYS system to suit their needs. This document was designed to accommodate the varying needs of the reader.

MSI CLIENT

This installer provides Administrators the ability to push the client installer to each computer as a domain change (similar to scheduled updates) rather than needing to physically install the client on each individual computer.

REQUIREMENTS:

➢ Client must be installed by an Admin User
➢ Recall options in Desktop Client requires Management Studio be installed and run at least once

For additional installation information, refer to the [MSI Client Install Guide](#).

OAISYS ADMINISTRATOR

ACCESSING THE ADMINISTRATOR

The OAISYS Administrator is a permissions-based application accessed through the Management Studio, and can be accessed remotely. You do not need to be on the OAISYS server to configure the system or setup your user groups and permissions.

Open the Management Studio Client and log in with your username and password.

You have the option of automatic login by selecting the *Automatically log me in* checkbox

This will launch the Management Studio Client. The Admin button will appear within the client application as shown below.

NOTE: If you are already logged into the client application you will not need to log in again.
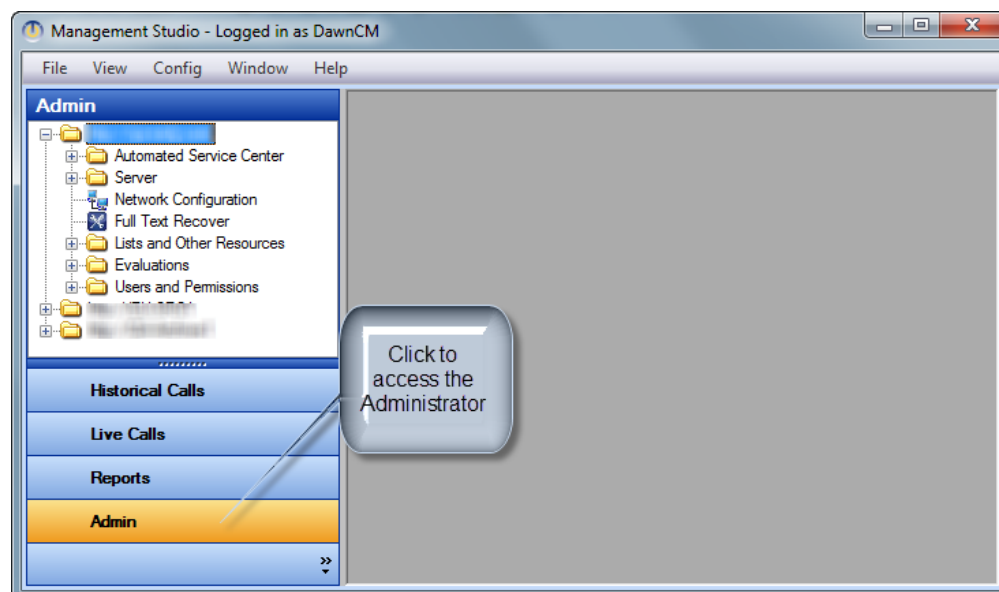
Administrator Functions

The OAISYS Administrator displays and allows changes to user permissions.

The administrative user can:

- Create and edit new users and groups
- Create and use lists
- Display and enable changes to system settings
- Set up evaluations
- Configure automatic reports
- Set up housekeeping rules
- Set up after call actions
- Configure alarms
- Pull system logs

NOTE: If the optional OAISYS Screen Recording Server or a secondary server is present it can also be administered from the OAISYS Administrator.

The Administrator is divided into five sections:

1. Automated Service Center
2. Server
3. Lists and other Resources
4. Evaluations
5. Users and Permissions

AUTOMATED SERVICE CENTER

The Automated Service Center is the command center of your OAISYS Solution; it administers communication with the OAISYS Server located at OAISYS Headquarters.

This feature allows you to manage your system's Registration and Licensing, establish alerts for automated notification of problems to OAISYS, and is the area in which OAISYS will automatically apply enabler codes for newly purchased features.

REGISTRATION TAB

The Registration tab allows you to register your system and save your Dealer contact information.
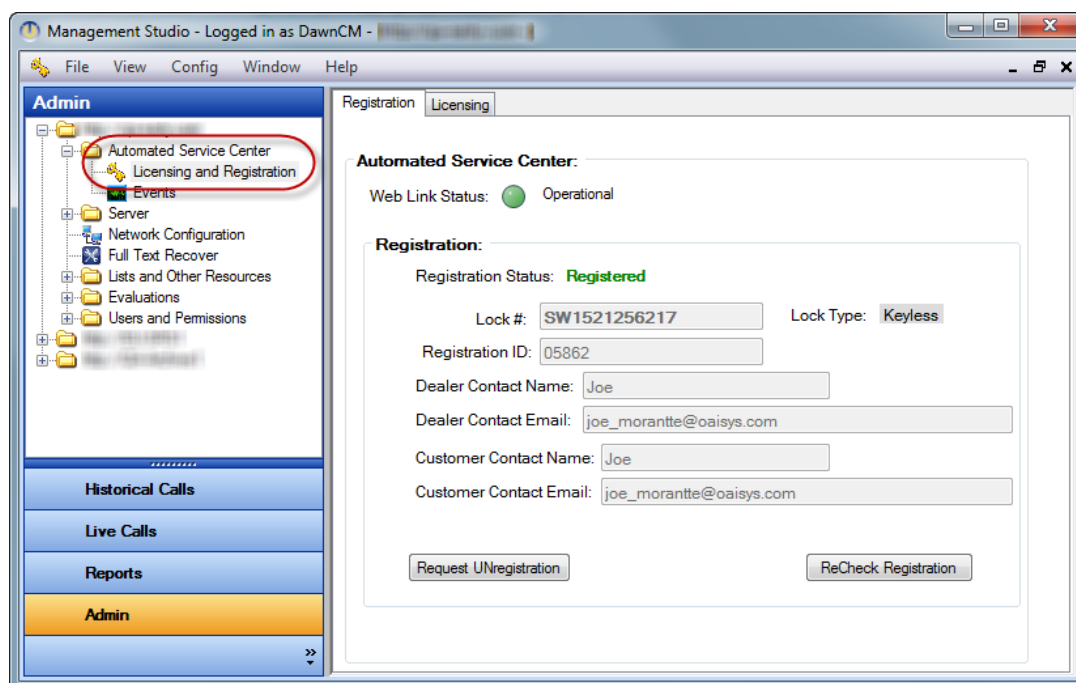
NOTE: If using a hardware key, the Lock Type will display Lock Type: ??

KEYLESS LICENSING

With Keyless Licensing, hardware dongles are no longer required (but are still available upon request); clients will be provided a Lock Number and a Registration ID.

Example:

Lock #: SW1713145582

Registration ID: 27797

NOTE: Constant communication with the OAISYS Server via internet access is required.

The Web Link Status will display a green light to indicate an operating status with the OAISYS Service Center (OSC).

Yellow indicates the Service Center is not responding.

NOTE: The Red, Yellow or Green indicator light displays the status of the connection and does not indicate the status of registration or licensing.
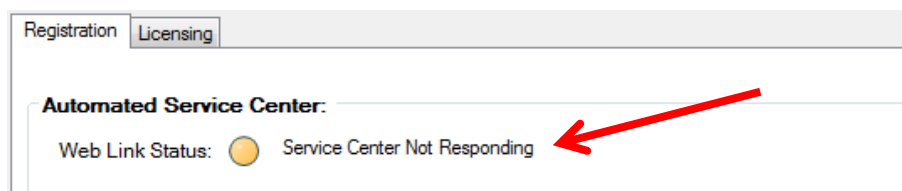
The Registration Status will say *Not Registered* until the lock number has been properly registered.

Tracer Escalation

When Tracer cannot access the OSC (no longer has access to the internet).

Keyless License

Level	Time	Action
1	48 hrs.	Tracer Alarm: "Network Lost"
2	4 days	Attempt to send Email to TS
3	6 days	Notify Tracer Clients of Impending shutdown.
4	8 days	Switch Tracer to DEMO mode

Hardware Dongle License

Level	Time	Action
1	48 hrs.	Tracer Network Lost Alarm
2	4 days	Attempt to send Email to TS

OAISYS Service Center Escalation

When a registered Tracer hasn't checked in recently (each Tracer should check in approximately every 15 minutes).

Keyless License

Level	Time	Action
1	1 day -- Alarm	Send Email alarm to TS, Dealer, & Customer
2	10 days -- Assumed Dead	Send Email alarm to TS, Dealer, & Customer

Hardware Dongle License

Level	Time	Action
1	1 day -- Alarm	Send Email alarm to TS, Dealer, & Customer
2	10 days -- Assumed Dead	Send Email alarm to TS, Dealer, & Customer

TO REGISTER

1. Enter the Lock Number
   a. The Lock Type will display [??] until properly registered
2. Enter the Dealer Contact Name
3. Enter a valid email address for the Dealer Contact
4. Enter the end user customer name
5. Enter a valid email address for the end user customer
6. Click the Request Registration button

Once registered, the Registration Status will change to *Registered* and the Lock Type will display as *Keyless*.

A user can request to unregister their Lock Number by clicking on the Request Registration button. This will send a message to the Automated Service Center to unregister this lock number, and confirmation emails will be sent to each email listed. UnRegistration will not take effect until confirmation is received from the email link. Once unregistered, the OAISYS system will no longer function until the lock number is registered again.

NOTE: If a hardware key is used, the system will continue to function. However, the features of the Automated Service Center will no longer be available.

LICENSING TAB

The Licensing tab displays the licenses available for the specific lock number. This feature is where Enabler Codes can be entered to apply new licenses or extend the maintenance period. For Keyless Licensing, the Enabler Code is applied automatically. The Enabler Code for newly purchased features is applied automatically for hardware keys; however, manual entry is permitted for re-entry of older Enabler Codes associated with the hardware key.

The Maintenance Period Ends on date is the date your OAISYS maintenance plan expires.
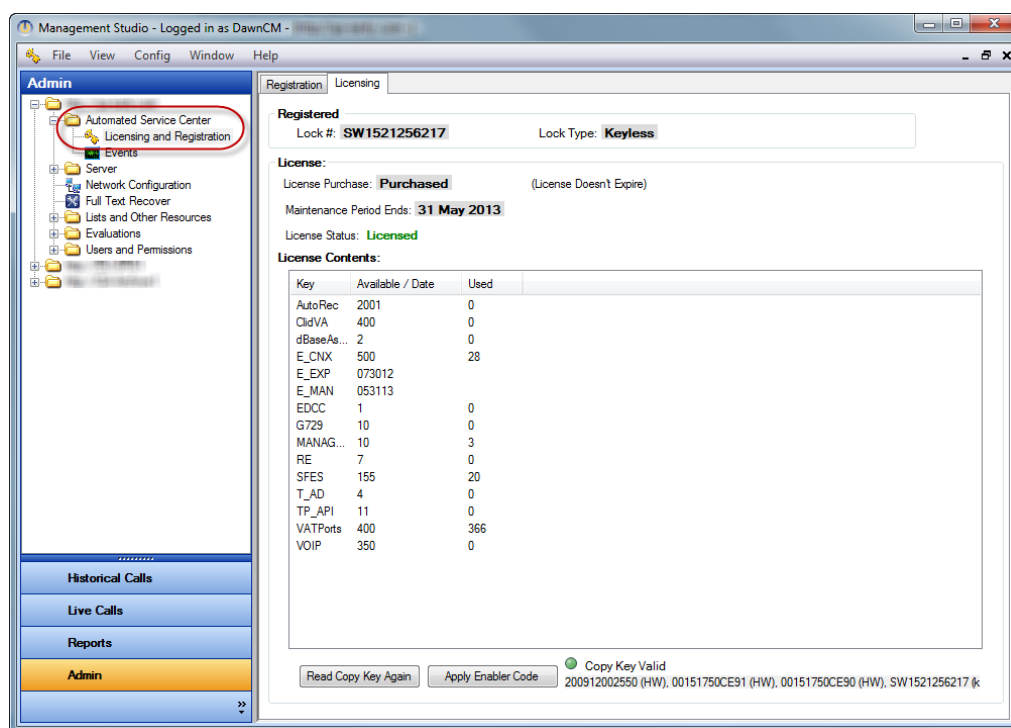
NOTE: Your OAISYS system will continue to work even if your maintenance plan has expired.

SERVER

The server section within the OAISYS Administrator expands to allow configuration of:

- Net Server
- Email Service
- CTI
- SMDR
- ALI Integration
- Active Directory Integration
- SQL API
- Speech

- Recording Manager
- PVD Import
- File Streaming
- Alarms
- Housekeeping Settings
- Coaching
- IP Endpoints
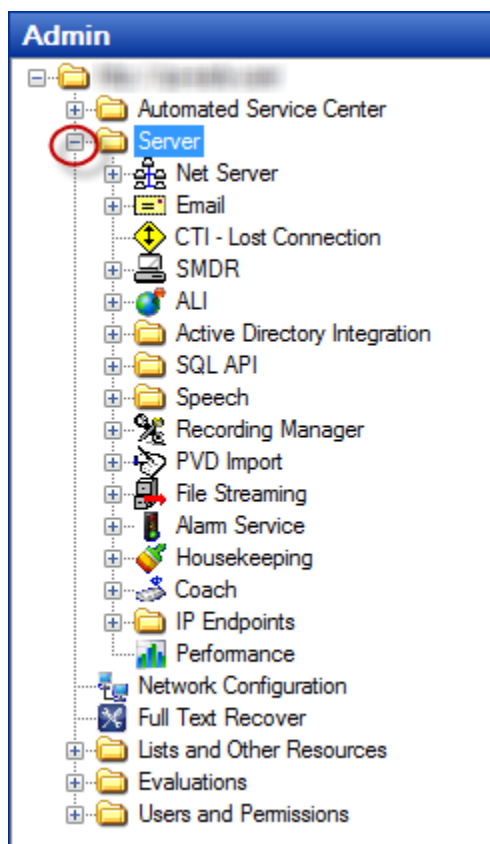
NET SERVER

The information covered under this section addresses the folder level options and provides details for the configuration of specific features.
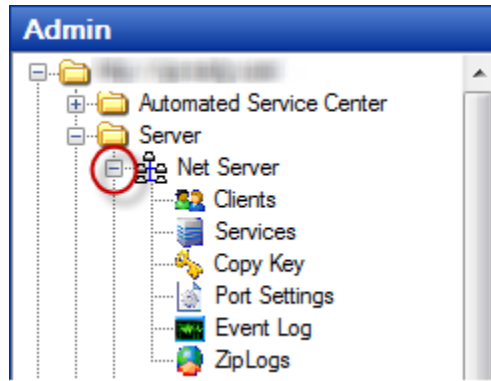
Clients

Displays information about the client applications connected to the Net Server.

NOTE: Display only – configuration is not available from this screen.

Services

This displays services running under the Net Server. Highlighting a service displays information about that service such as:

- Name
- Client Owner
- Clients using the service

NOTE: Display only – configuration is not available from this screen.

Copy Key

Copy key information will be merged into the Automated Service Center in a future release. It is being maintained at this time for organizations accustomed to the old organization format.

The Copy Key section displays the number of port licenses authorized on your system as well as the number of used ports. A green light indicates the key is being read by the Net Server. A red light may indicate there is a problem. Port licenses are displayed as VAT Ports. The number of available and used licenses for Call Managers is displayed as MANAGER.

The Maintenance Period Ends on date is the date your OAISYS maintenance plan expires.
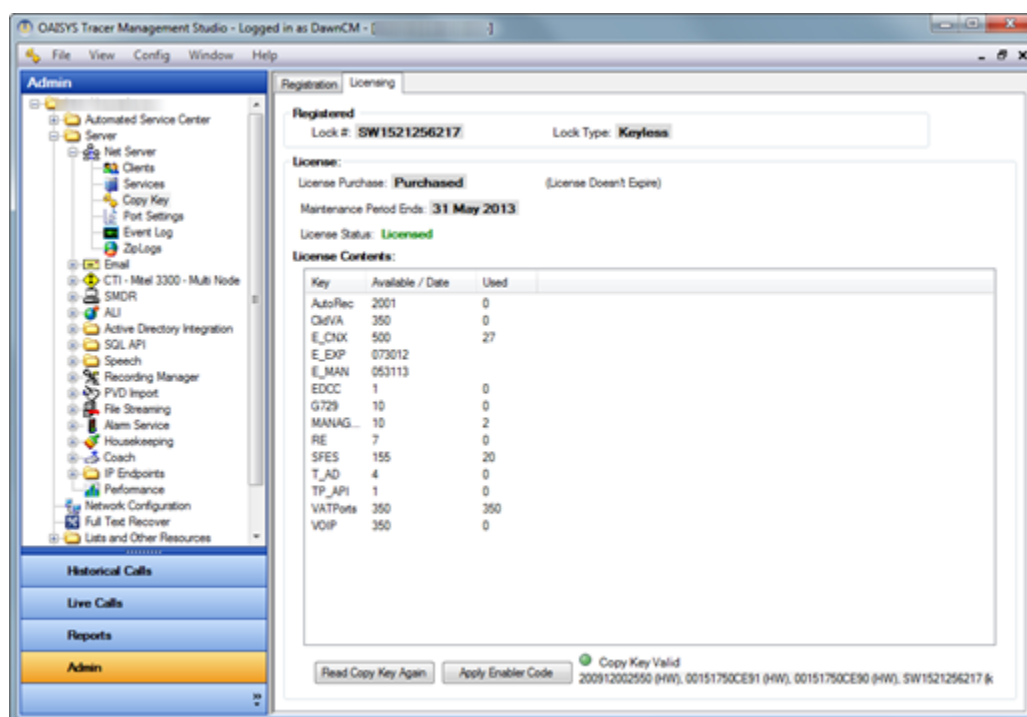
Read Copy Key

Clicking this button sends a message to the Net Server to re-read the information on the key. While re-reading the key, the status light will temporarily turn yellow to indicate the reading is in progress.

Apply enabler code

Clicking this button launches a pop-up to enter the enabler code. An enabler code is an alpha numeric code that is used to extend the OAISYS maintenance period.

NOTE: Enabler codes are always upper case letters. The letter "O" is never used in an enabler code. Enabler codes are not used for Keyless Licensing.
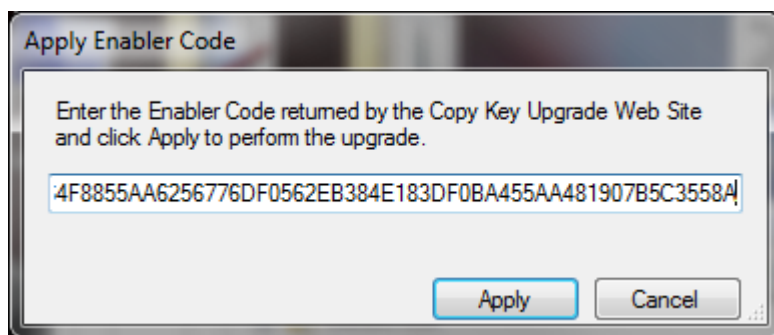
Port Settings

This section is used to configure the port settings for the local and remote ports. The local port number is set to 8767 by default. Keep the Network drop-down list set to <Any> unless there is a specific IP address to allow services to connect to your network.

If you are using a remote port, check the box. The remote port number is typically set to 8768. Select the IP address from the dropdown lists.
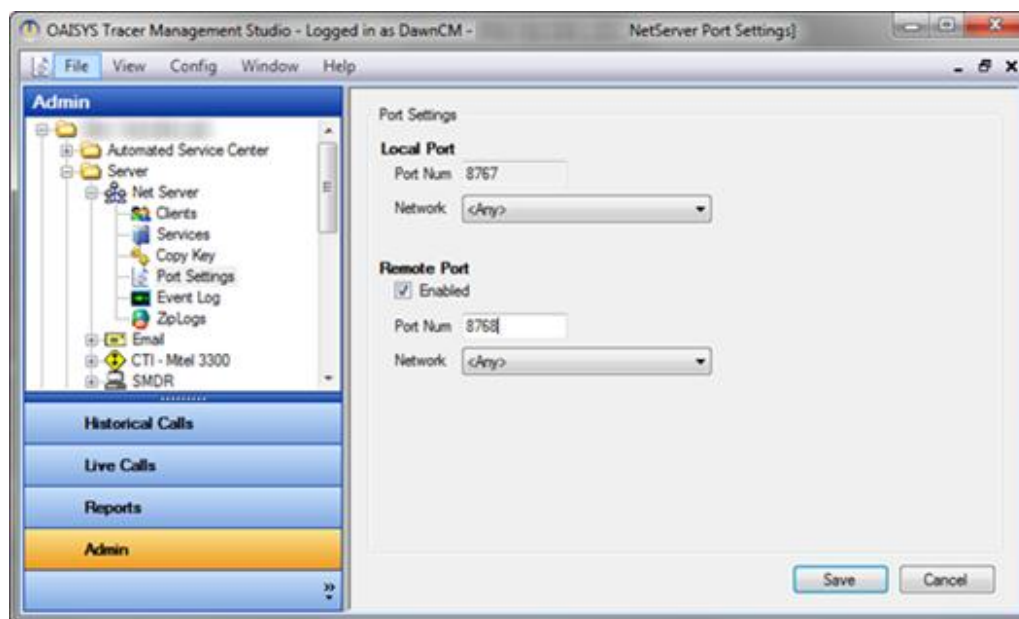
Event Log

Display of events used primarily by OAISYS technical staff for troubleshooting purposes.

Zip Logs

This is a tool used to help OAISYS technical staff troubleshoot problems when there is an open support ticket.

ZIP LOGS INFORMATION

Enter as much detailed information as you have. If you do not know the

answer to a question or if there is not an answer to the question, leave it blank. Enter the name of the OAISYS personnel involved with the support issue if you know it.

Example: John_Smith

OPTIONS

Enter check boxes to indicate if you'd like to include the database and configuration files, Dr. Watson files, and phone system files. If you opt not to send the log files directly to the OAISYS HTTP site, select the option to split the output into smaller files for email.

Once you have made your choice, click **OK** on the Options pop up window → then **Zip**

The green bars will indicate the files are being uploaded, and a message will display below the green bar indicating when the zip log is complete.

EMAIL

This section provides details to configure your email.

Settings
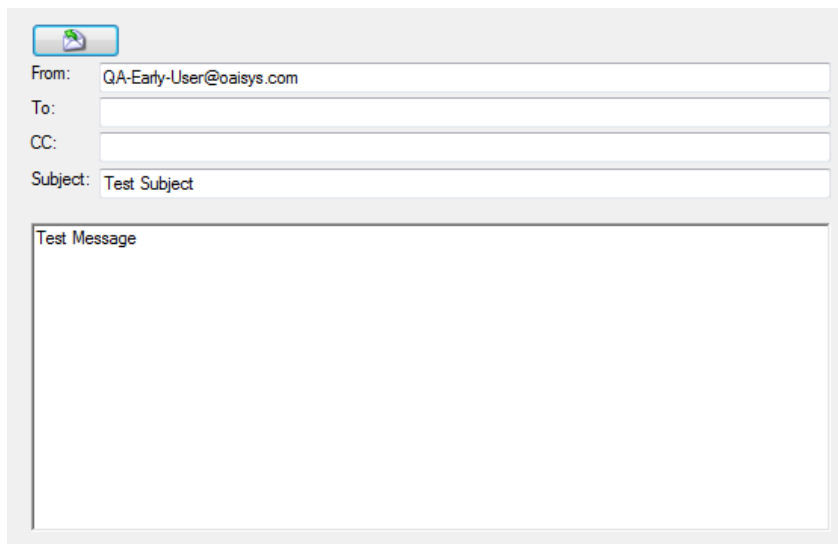
Enter the SMTP settings for your server here. Check the box to enable a secure connection.

Verify the **From** email address is entered. This is the address that will be used for all administrative emails sent from the OAISYS server.
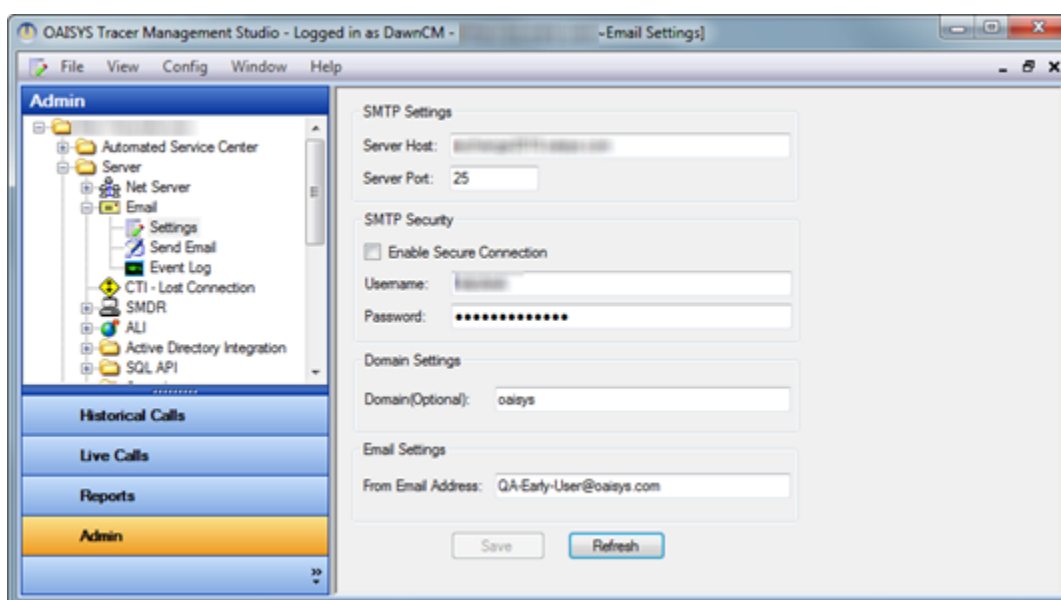
Send Email

This sends an immediate message from the OAISYS server; the **From** field is populated with the email address entered in the Email Settings screen.

Event Log

The Event Log displays email log information for troubleshooting purposes. Configuration cannot be done from this screen.
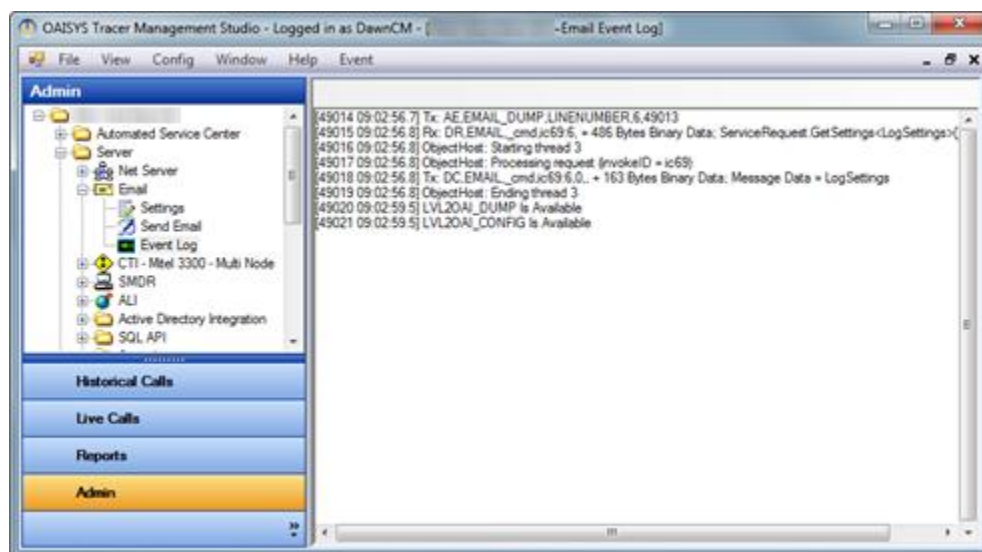
CTI INTEGRATION

This segment of the guide explains the features available for organizations using CTI integration. Not all OAISYS systems are configured in CTI mode. This is only for CTI integration.

Tools

The tools folder is for future enhancements to the OAISYS product.

Status

The PBX connection status displays a green light if there is a connection to the phone switch.
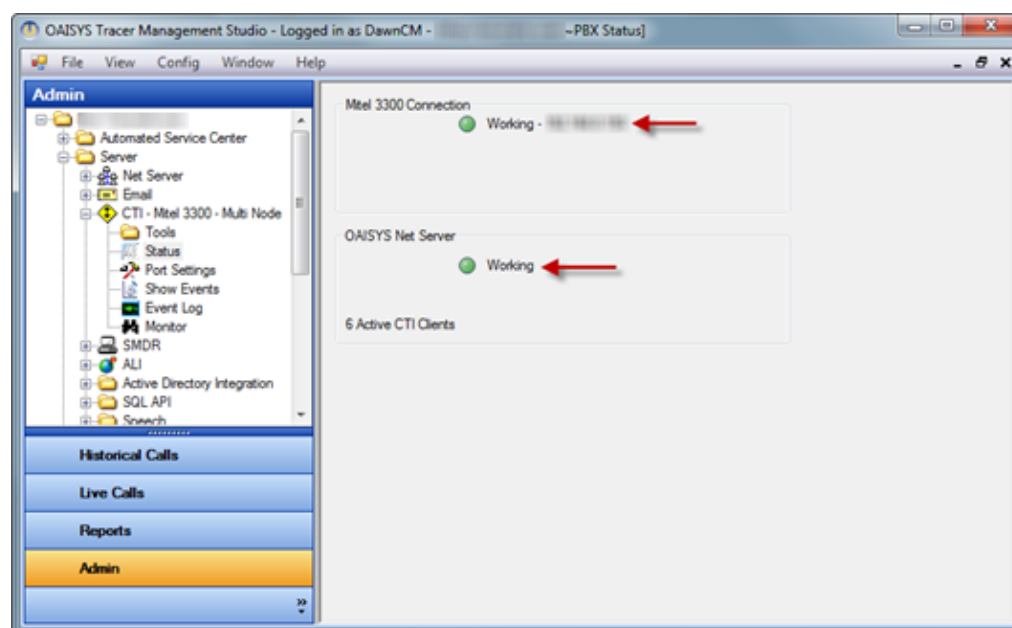
NOTE: A green light for the OAISYS Net Server status indicates a working connection to the Net Server; the number of active client connections to the replicator port is displayed below the Net Server.

Port Settings

In the expanded folder view, select Port Settings to access the configuration screen.

To configure the port settings

Enter the IP address or the hostname of the PBX → click **Apply**
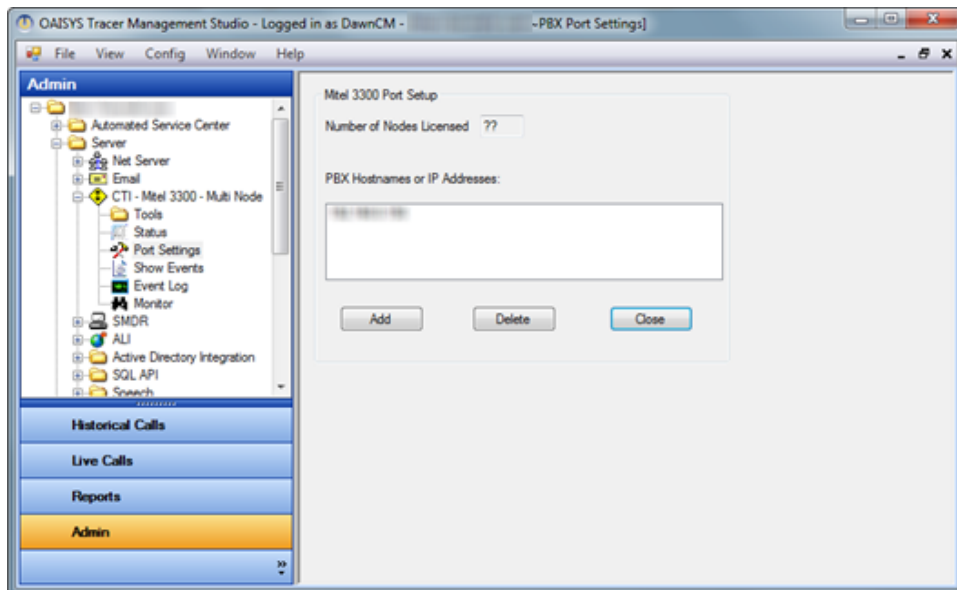
NOTE: This screen will also indicate the number of Nodes licensed (Specific to Mitel Multi-Node).

Events

This displays events which are primarily used for troubleshooting.
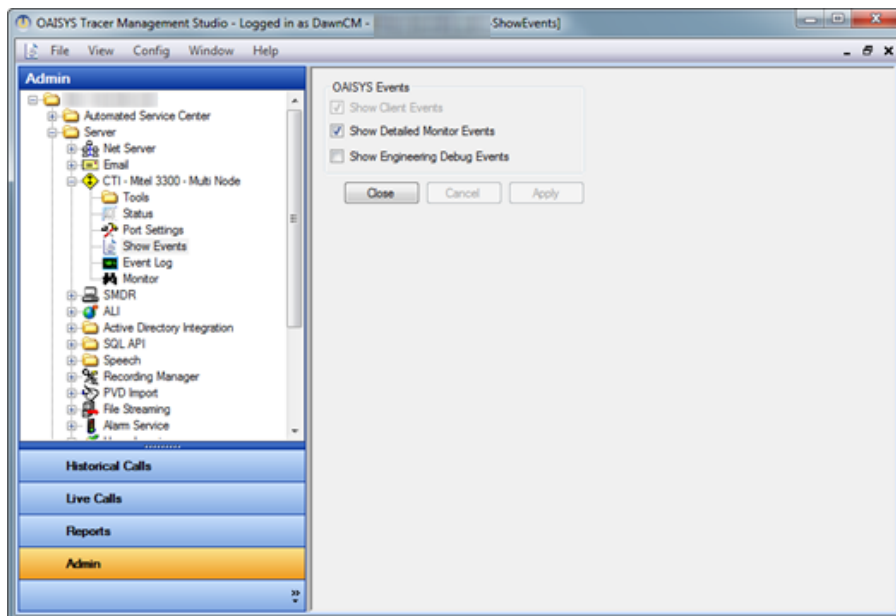
Monitor

The monitor is primarily used for troubleshooting purposes.

SMDR

This is for organizations using their OAISYS system with SMDR integration.

SMDR Port

If using your OAISYS system with SMDR integration select the PBX type from the drop down list. Once the port is open the operating status light will turn green.

PORT TYPE

Select the method in which the OAISYS system is receiving the SMDR output from the phone system. The available options are RS232 or IP Port.

If IP Port is selected, enter the IP Address of the port and the port number.

Some SMDR outputs include leading zeros in the ANI information; enter a checkmark to strip the leading zeros from the ANI.
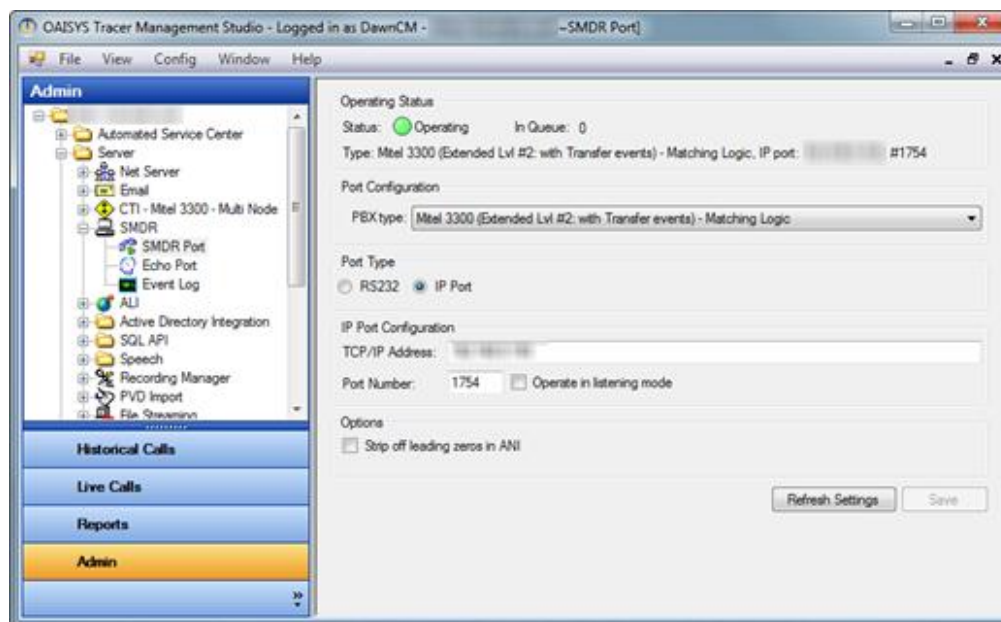
Echo Port

Configure the port type if you are using your OAISYS system to replicate the SMDR integration.

1. Check the Enabled box

2. Select the appropriate port type

3. If RS232 is selected, choose the Com port, BAUD Rate, Parity, and HandShake from the drop down options

4. Enter the data and stop bits
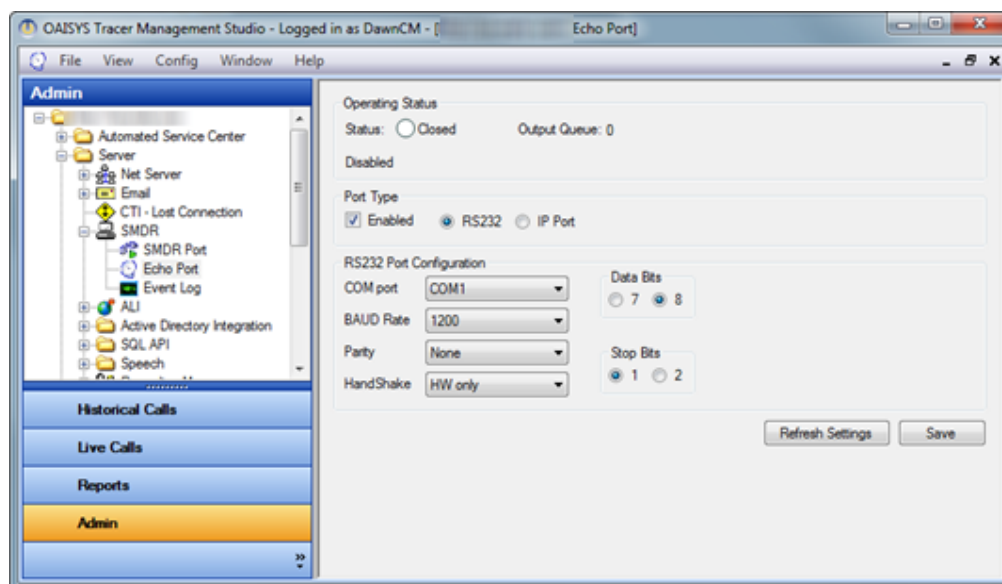
Event Log

This screen displays events for the SMDR service and is used primarily for troubleshooting.

AUTOMATIC LOCATION IDENTIFICATION (ALI)

Automatic Location Identification (ALI) identifies the caller's location based on address and/or latitude/longitude coordinates. This feature requires custom integration at this time. This integration requires that ALI information be sent to the OAISYS system from a PSAP or 911-system via RS232 or IP Port.

ALI Port

Select the ALI Integration output type from the drop down. Configure the port settings.
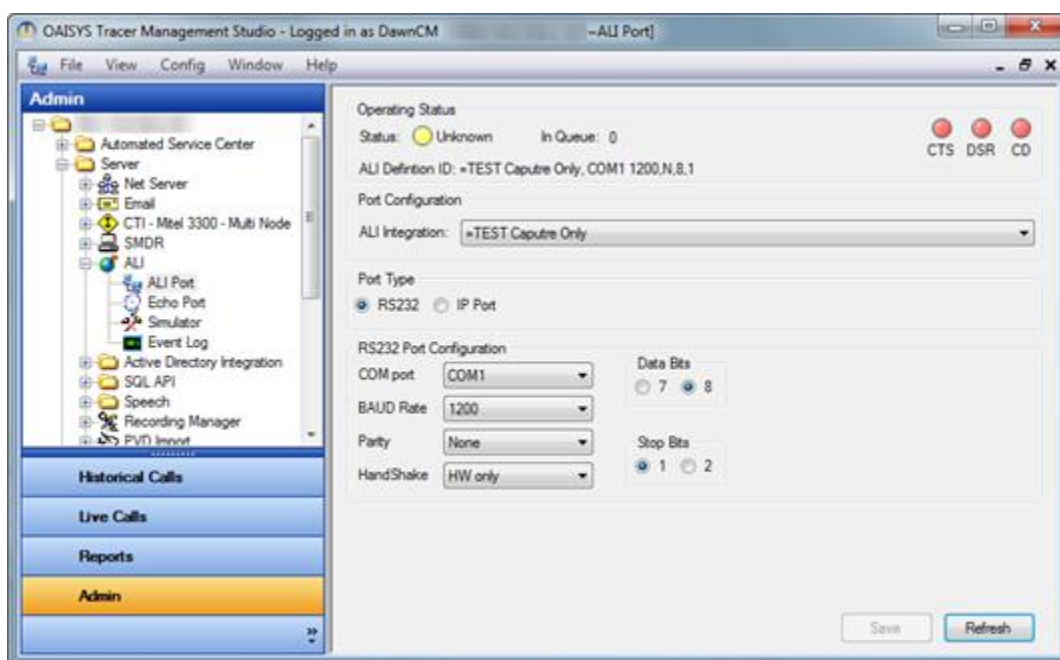
Echo Port

The Echo Port receives and "echoes" the data received. Enable the port type and enter the configuration information for the port.

Simulator

This option is used to simulate ALI information for testing purposes.

Browse to the location of the input log file(s).

Event Log

This screen displays the events for the ALI integration and is used primarily for troubleshooting purposes.
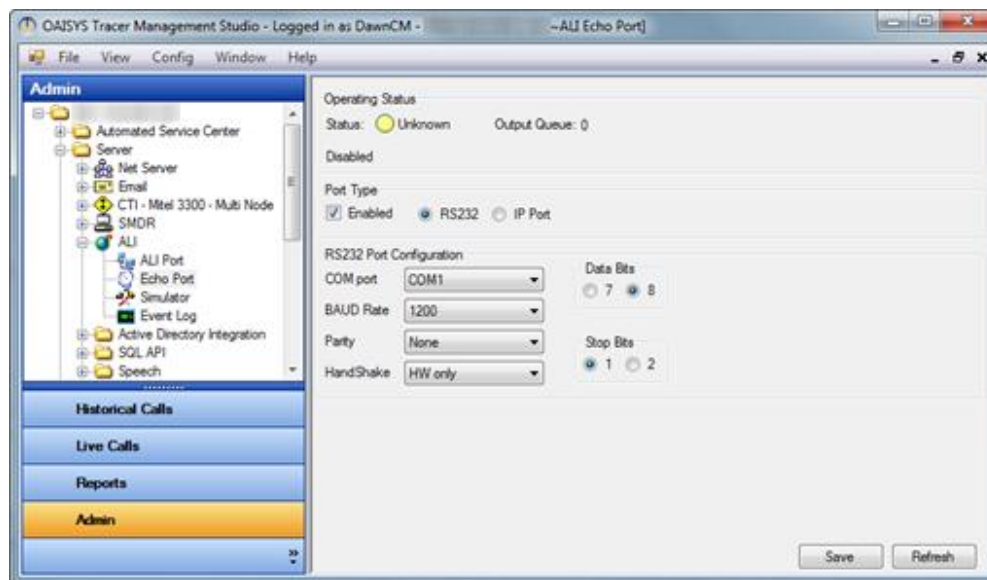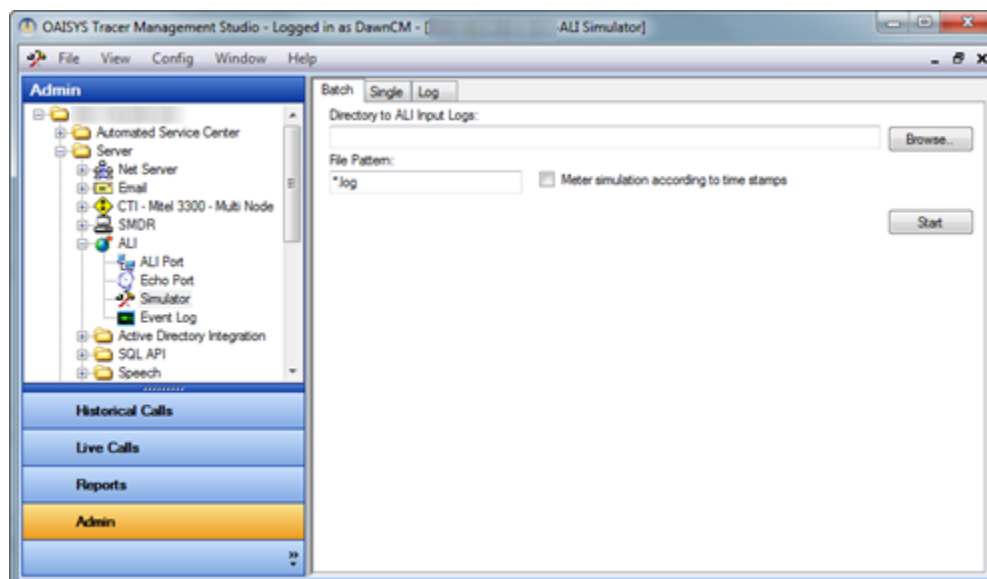
ACTIVE DIRECTORY INTEGRATION

Active Directory Integration is a feature providing the OAISYS system access to import user and user group information from Active Directory (AD). To use this feature, an AD domain name has to be specified. All users on this AD domain will be allowed to log into OAISYS; it is system-wide and is available for users with OAISYS Admin privileges.

NOTE: AD is not currently integrated with the Navigator application.

From Admin → Active Directory Integration → Configuration → Select the checkbox to enable or de-select the checkbox to disable this feature

For each AD user – the user will have the following options:

- Automatically log into OAISYS using Windows credentials
- Populate the user name from Windows credentials without automatically logging the user into OAISYS, and require the user enter their password
- Do not use Windows credentials to log into OAISYS; require manual entry of user name and password to log into OAISYS

OAISYS will authenticate each AD user with AD server during the login process. If authentication is successful, OAISYS will sync the user credentials with the OAISYS server.

NOTE: The OAISYS system will generate a major alarm (#2043: Active Directory Integration Inoperational") if OAISYS loses communication with AD.

When OAISYS syncs the user credential with the OAISYS server, the following fields will be imported from Active Directory:

- ➢ User Name (User Name in Active Directory)
- ➢ User Description (Description in Active Directory)
- ➢ Password (Password in Active Directory)
- ➢ Primary Extension (Telephone Number in Active Directory – General Tab)

> ➢ Email Address (Email address in Active Directory)
> ➢ All the AD user group(s) memberships for this user; the relationship/membership for the AD user group(s) will be maintained

These imported fields cannot be modified from OAISYS. The user imported from Active Directory cannot be deleted through OAISYS, but setting the user account expiration date disables the account. A delete option is not available for the OAISYS user.

An imported user from AD will have the default permissions for this site. Any additional permission must be established through the OAISYS Administrative Client Application. By default, the imported user group from AD will not have any preset Application Permissions. Application permissions for User Groups can be set through the User Groups section of the OAISYS Administrative Client Application.

Users created in OAISYS will not be added to AD – but if the same user is later created in AD (based on user name) the AD user's permissions will be overwritten and merged with the OAISYS user's permissions.

OAISYS only users can be added, edited and deleted from the OAISYS Admin Client application. However, these changes do not carry over to Active Directory. System-defined user accounts in OAISYS are not integrated with AD.

Enabling AD Integration

This section reviews Active Directory Integration configuration, each section is discussed in further detail below.
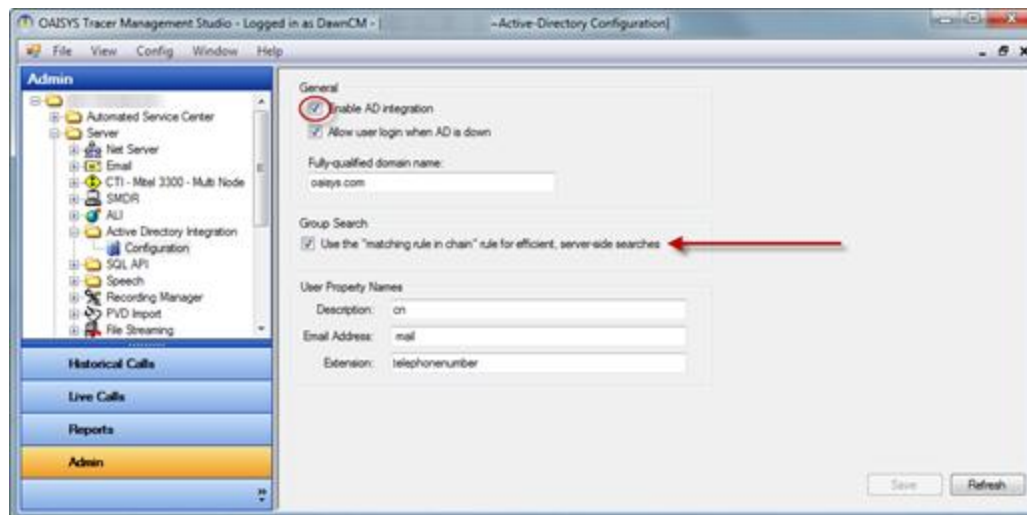
NOTE: If any of these fields are left blank in Active Directory, they will not import into OAISYS.

Example

If the email address field is left blank, email addresses from AD will not be imported.

GENERAL

For OAISYS to integrate with AD, check the box to enable AD integration.

Checking the box to allow user login when AD is down provides users the ability to log into the OAISYS system when AD is unable to communicate by using the OAISYS authentication instead of Windows authentication from the login pop up. However, it will not sync any changes since the last login if AD is down. Use the text box under fully-qualified domain name to enter the domain name for the AD Server.

GROUP SEARCH

This feature provides a more efficient way of searching AD users; check the box to use the matching chain rule.

USER PROPERTY NAMES

This feature provides the flexibility and adaptability to different customer environments.

Example

For email, MS Exchange uses the "mail" property to store the email address, but a different email solution may use a different property name; e.g., "email", "emailaddr", etc.

AD SINGLE SIGN-ON (SSO)

AD SSO is a system-wide setting which allows users to bypass entering their credentials when the Windows SSO Authentication type is selected from the log on page. This option is available when the Enable AD Integration option has previously been enabled (checked). If AD SSO is not available, this option will be greyed out.
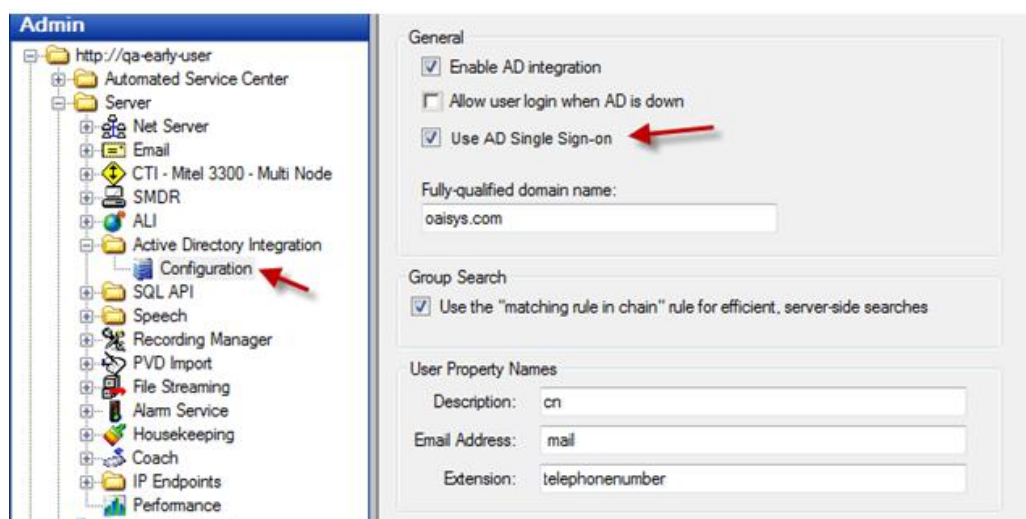
NOTE: A user password will not be retrieved from Active Directory or stored for this user account. To maintain security, users will not be able to change their password from within Management Studio (the Change Password option is not visible if AD SSO is enabled).

If using the OAISYS Screen Recording Server, identical configuration steps on that server are required to support the AD SSO functionality.

SQL API

A set of stored procedures requiring account authentication are available that provide restricted access to search for recordings, retrieve information about a recording, and add new information to recordings.

OAISYS products utilize Microsoft SQL Server as the backend platform. A complete list of stored procedures can be found here: http://www.oaisys.com/downloads/OAISYS_API_Overview_&_Developer's_Guide.pdf

Enable SQL API

This section reviews the procedures for configuration of the SQL API; each section is discussed in further detail below.

To use the SQL Stored Procedures, check the "Enable SQL API" box.
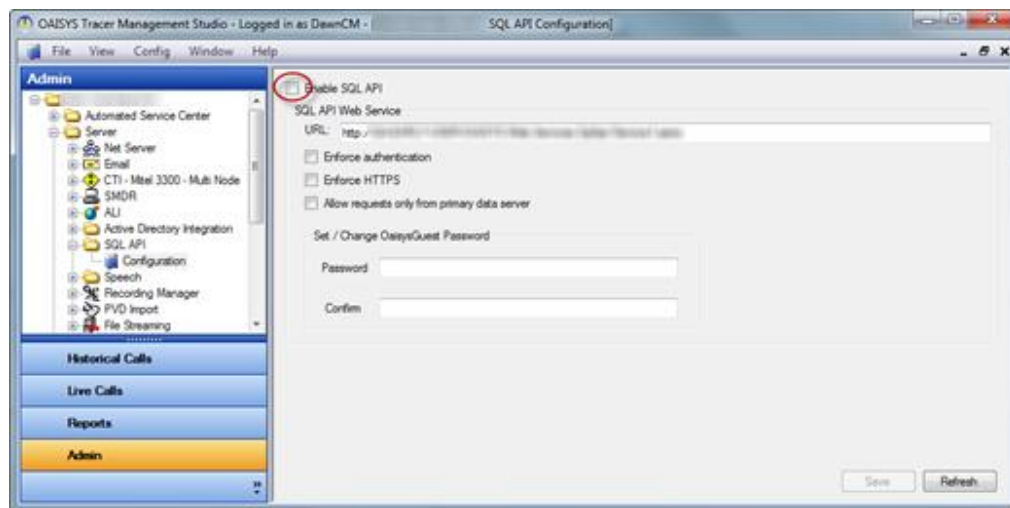
SQL API WEB SERVICE

Enforce Authentication

Check this box to enforce a valid OAISYS user/password with permission for the API call. Keeping this box unchecked leaves the API open to any user.

Enforce HTTPS

This ensures the traffic between the client application and OAISYS is encrypted; check this box to ensure OAISYS has a valid SSL

certificate, and require the web service take requests via HTTPS (port 443). Keeping the box unchecked allows client application requests via HTTP (port 80); the results transmit in clear text.

Allow requests only from primary data server

When checked, the SQL API web service will fail a request if its origin IP address doesn't evaluate to the primary data server.

Set / Change OAISYSGuest Password

This allows the SQL API password to be programmable.

SPEECH SEARCH

The Speech Config screen is used to set up the Speech-Analytics Server to conduct Speech Searches.

1. Verify the checkbox is selected to Enable Speech Indexing/Searching
2. Enter the full URL of SAS server including Port Number
3. Select an option from the drop-down list of supported languages
4. Set the indexing schedule
   a. Real Time – Calls are indexed on completion
   b. Scheduled – Calls needing to be indexed are set in the queue until the scheduled time period
   c. Disabled
5. Enter the Start and Stop times
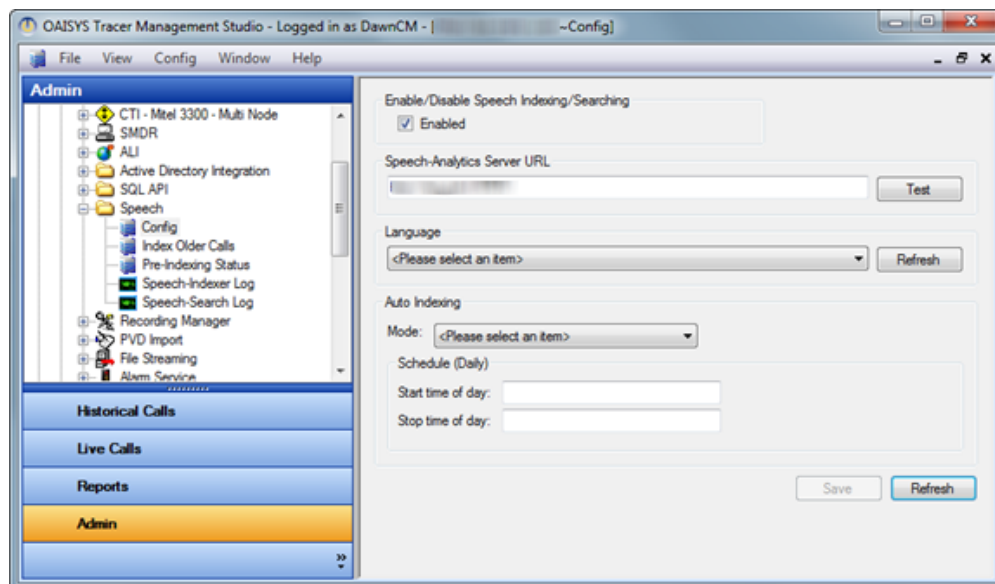
Indexing Older Calls

Indexing older calls can be accomplished according to the settings chosen

NOTE: This will take a long time and depends on the number and length of the calls being indexed. At this time there is no option to cancel once this is started.
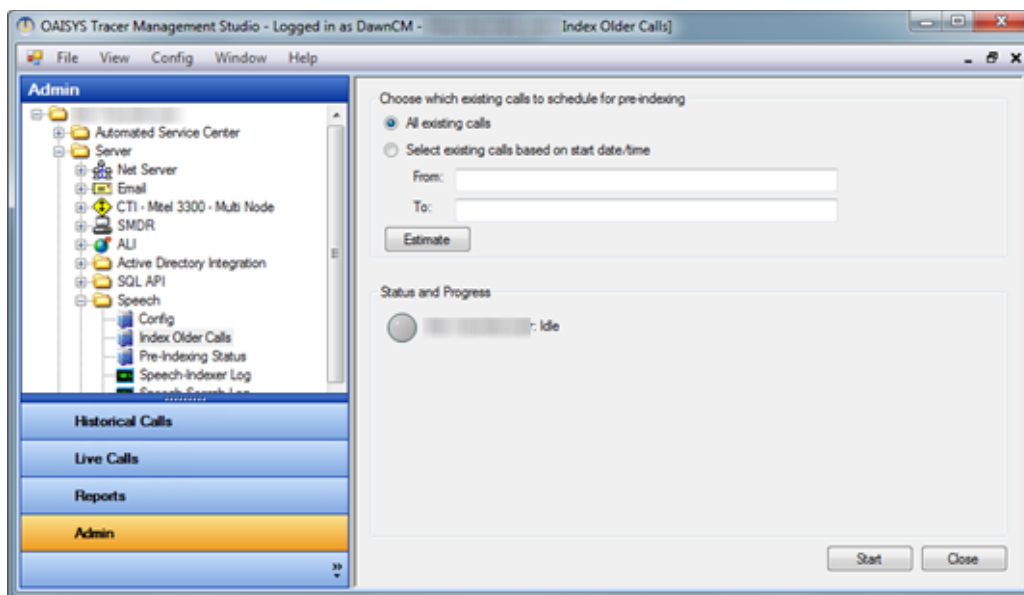
Pre-Indexing Status

The Pre-Indexing Status screen provides a view of the status for each Tracer, showing how many calls are scheduled for pre-indexing on that Tracer. These controls allow users to get the latest count, refresh, or clear the queues in the entire network.
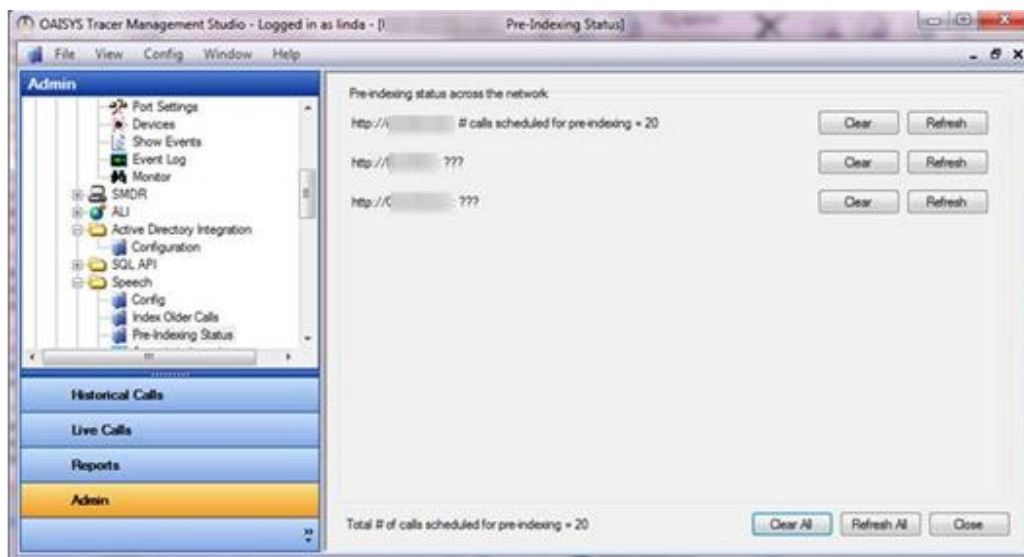
Speech-Indexer Log

This log file provides a record of all indexing activity.

Speech Search Log

This log provides a record of activity that takes place on the speech search server.

RECORDING MANAGER

The recording manager is used to configure call recording settings.

NOTE: Some PBX platforms include a node called ACD Config; this is to specify the setting to connect to the ACD server.

Call Recording Rules

Recording rules are based on call filters indicating to the OAISYS system which calls to record, and apply to the current point in time of the call. Each Call Recording Rule associates a call filter to a recording action. You can establish multiple call filters to a specific recording action. OAISYS can only record a call when the call satisfies a call filter. You can create call filters from the Call Filters section under Lists and Other Resources.
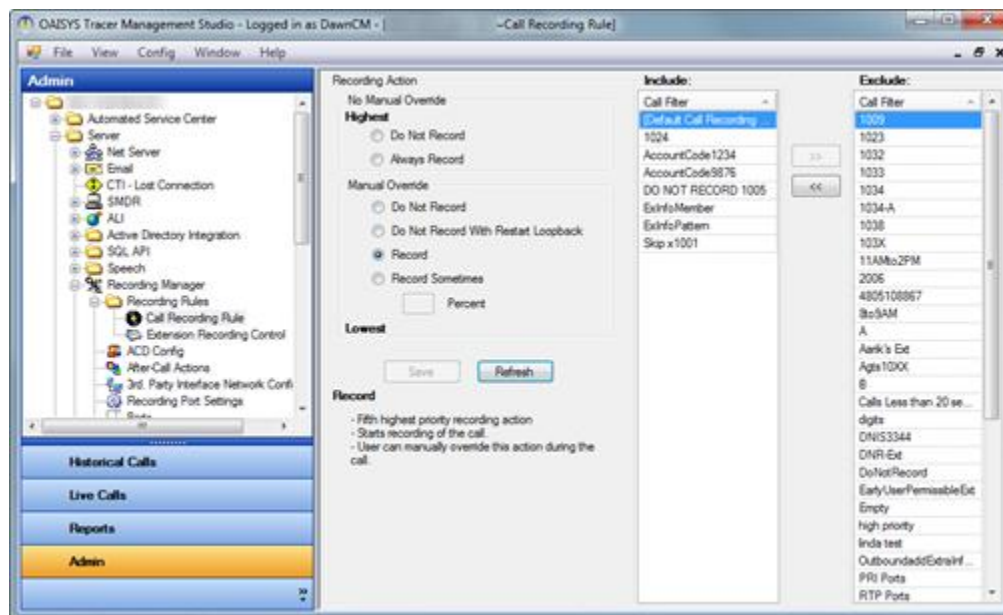
➔ Move one or more call filters over using the double arrows.

A call may satisfy one or more Recording Rules at a specific point in time. If a call satisfies two or more Recording Rules with conflicting Recording Actions, OAISYS will resolve the conflict using the action with the highest precedence. The recording actions are listed in hierarchal order below.

RECORDING ACTIONS

Do Not Record

This action immediately stops the physical recording of the call and discards any loopback portion of the recording in the call. When the call is in this state, no user can manually resume recording of this call.

Always Record

This action immediately starts a recording on the call when the call satisfies a call filter. There is no manual override. In other words, if the call satisfies the call filter it will be recorded 100% of the time. No user can manually stop recording this call.

Do Not Record with Manual Override

This action immediately stops the physical recording of the call. A user with manual recording permission can resume recording of the call.

Do Not Record with Pause Loopback

This action does not stop the physical recording of the call, but from the user's perspective, the call will look as if it is not being recorded. If another call filter is eventually met or if the user with permission manually starts the recording, the loopback portion of the call is retained. If the OAISYS system or user does not resume recording the call, then OAISYS will discard the loopback segment of the call.

Record

This action starts a recording on the call when the call satisfies a call filter. A user with permission can stop the recording. If this happens and the user then resumes recording, the loopback portion of the call is retained.

Record Sometimes

Enter a number from 1 to 100 to indicate the percentage of calls meeting the call filter to be recorded.

Extension Recording Control

This control screen allows a list of extensions to manually stop and start recordings. Select the list of extensions from the drop down. Each option is discussed in further detail below.

NOTE: These permissions do not apply to start/stop in Management Studio Live Calls which are established by the user's Live Calls Permissions.
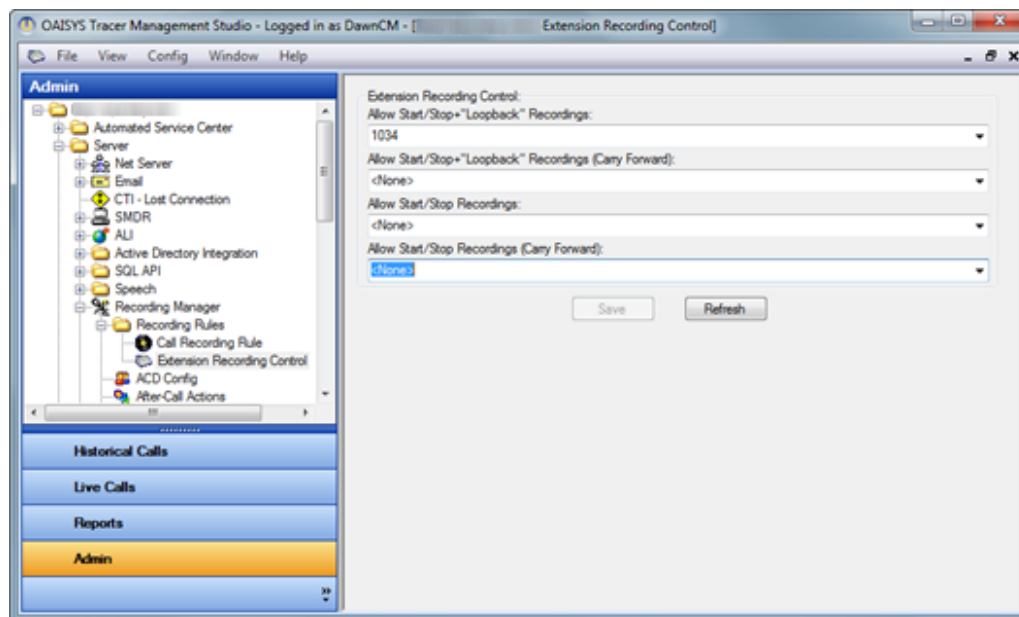
ALLOW START/STOP + LOOPBACK RECORDINGS

This allows the user to manually stop and start their recordings with the OAISYS Desktop Client application or by another legacy application, and when the user starts the recording it will include the entire call. It will include any part of the call that took place prior to the user clicking the start button.

E*xample*

If a user was on a call for five minutes before they click the Start Record button, and the calls lasts ten minutes, when the call recording is retrieved, it will include the entire duration of the call including the first five minutes.

ALLOW START/STOP + LOOPBACK RECORDINGS (CARRY FORWARD)

This allows the user to stop and start their recordings manually. When the user starts a recording, the entire call will be recorded including any part of the call that happened prior to the user manually starting the recording. The recording will "Carry Forward," meaning if the call is transferred to another extension the call recording will continue.

ALLOW START/STOP RECORDINGS

This allows the users in the extension list to stop and start recordings. It does not include Loopback or Carry Forward.

ALLOW START/STOP RECORDINGS (CARRY FORWARD)

This allows the user to manually stop and start recordings. It does not include Loopback but it does include Carry Forward (as described above).

ACD Config

This configuration option attaches ACD Agent IDs on calls that are not associated with an ACD Group, and applies to outbound calls and inbound calls that do not route through the ACD. Inbound calls to the direct number can also attach digits (only available for some phone systems). IC calls will not be tagged with ACD Agent ID.
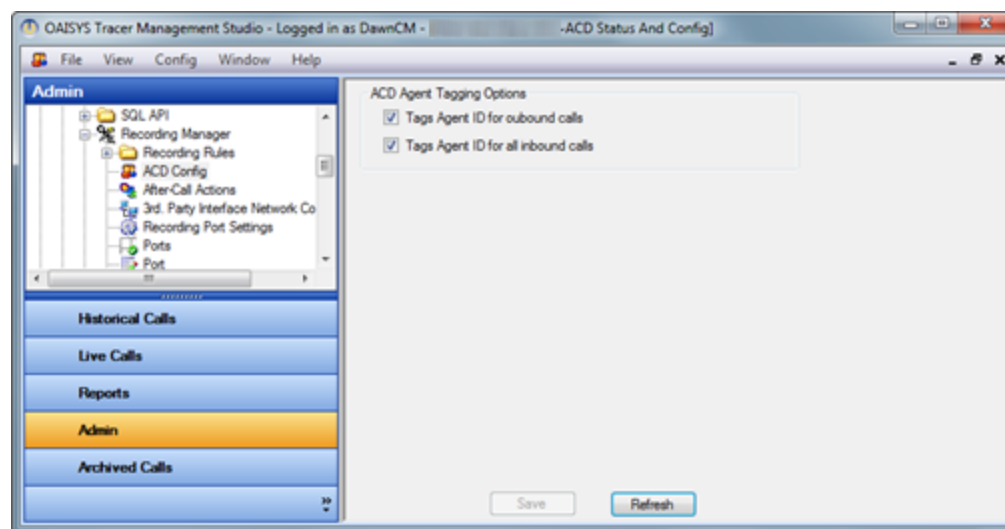
(Applies to phone systems ACD information is obtained from: Avaya,

Toshiba, Inter-Tel, and ShoreTel with ECC integration)

After Call Actions

This feature allows one or more actions to run after the call has ended, and are based on Call Filters.
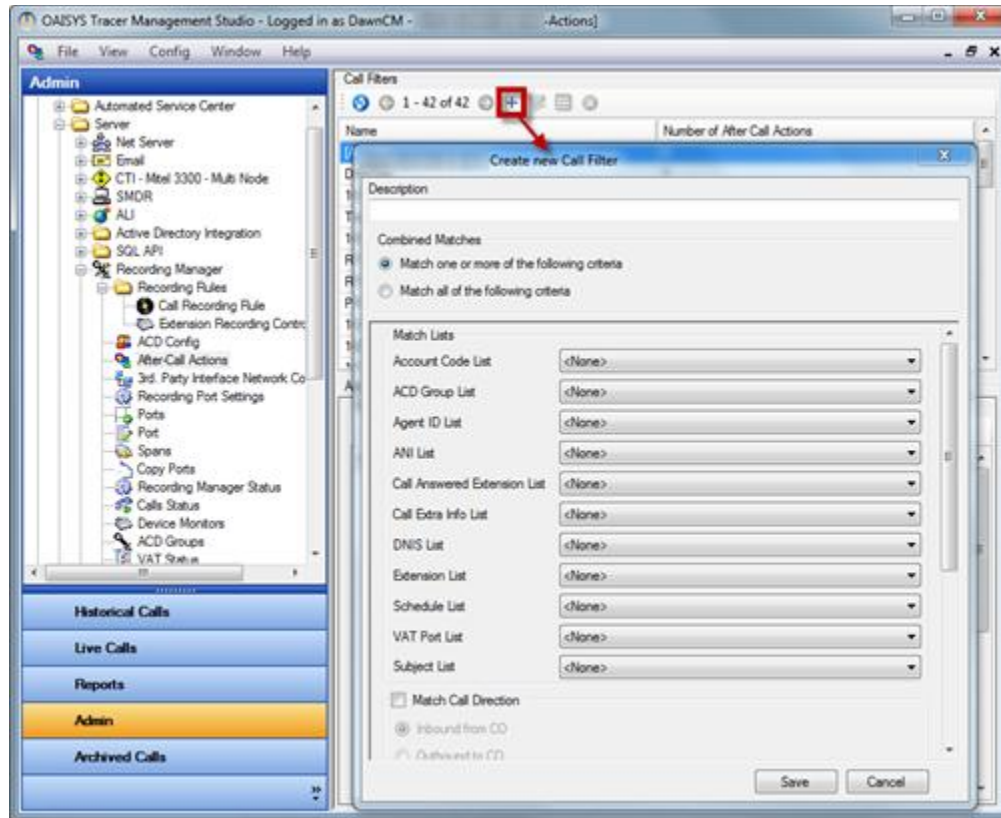
There are eight types of actions:

1. Log to File

This action will write a text string to a specified file.

The input parameters are:

- Append or Write to a new file

- Log file path name

- Log string

2. Run a Program

This action will run an external program.

The input parameters are:

- Program Name
- Username
- Password for the user account
- Domain Name

3. Delete Recording

This action deletes the recording of a call upon the calls' completion.

4. Send Email

This action sends an email of the recording once the call is complete.

The input parameters are:

- Email to
- Subject
- Message
- Attachment

5. Export Recording

This action exports the audio after the call has been completed, and can be used with a third party speech analytics application.

Audio formats supported include:

MP3 40kbps

MP3 64kbps

Native PVD

GSM Wav

Please refer to the application note specific to this action for more information – available upon request from Technical Support.

The input parameters are:

- Export Path
- Export Recording Type – select from the drop down list.
- Export Recording File Name – please refer to the Variable Tokens on page 45.

6. **Insert Call Information**

This action attaches information to a completed call, and can be set up at the time the Admin user establishes the after call action.

The required parameters are:

- Key
- Value

7. **Insert Call Data Field**

This action attaches preconfigured call data to a completed call, and can be selected from the drop down list at the time the Admin user establishes the after call action.

The required parameters are:

- Key
- Value

8. **Send Chat Broadcast**

This action can be used to send a message to all users of the legacy OAISYS chat application.

These variables will allow access to more information about a call, as shown in the following table:

Variable	Information
%A	Account Number
%BN	Recording File name (whole name) - example: "017XD.PVD"
%BX	Recording File name (Prefix) - example: "017XD"
%BY	Recording File name (Suffix) - example: "PVD"
%BD	Recording Date Start - MM/DD/YYYY
%BT	Recording Time Start (24 hr.)- HH:MM:SS
%BA	Recording Time Start (AM/PM) - HH:MM:SS AM/PM
%BP	Dialed Phone Number – xxxxxxxxx if Outbound, blank if Inbound
%BK	Trunk ID – blank if IC call
%BG	Agent Name
%BR	Call Direction ("In" or "Out") – but English only
%C	Call Historian Unique Database ID (GUID)
%D	Call Direction ("In" or "Out")
%E	Called Phone Number (DNIS number)
%F	ACD Group Extension
%G	ACD Group Name
%H	Calling Phone Number (hyphenated - type 1)
%I	PBX Call ID
%J	Calling Phone Number (hyphenated - type 2)
%K	Agent ID
%L	Length (duration) of a call in Seconds
%N	Calling Party Name (outside calls only)
%P	Calling Phone Number
%R	Recording Path and Filename
%S	Station Extension
%T	Call Type ("IC" or "CO")
%U	VAT Extension Number
%V	VAT Number
%W	VAT port number
%X	Extra Info field – i.e. %X("Notes")
&C	Insert a Carriage Return character
&D	Insert the Date in format: "mm/dd/yy"
&L	Insert a Line Feed character
&N….&N	Insert the Date and/or time in user-specified format and close with the '&N' character. i.e. &Nhh:mm:ss AM/PM&N (we do not support % in the date time format) for additional details please see: http://msdn.microsoft.com/en-us/library/8kb3ddd4(v=VS.90).aspx
&Q	Random Variable (6 digits)
&R	Random Variable (8 digits)
&T	Insert the Time in format: "HH:MM"
&&	Insert an Ampersand "&" character

Third Party Interface Network Configuration

The Third Party Interface is used when utilizing the OAISYS API. Not all systems will take advantage of this integration. Each option is discussed in further detail below.
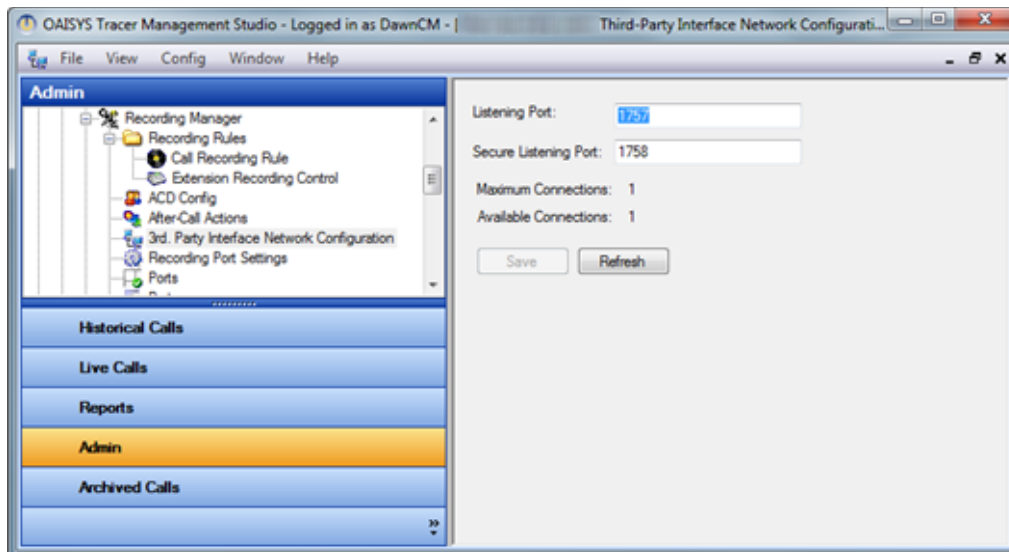
One example of how this interface is used: a Third Party Automatic Call Distribution application integrates with OAISYS to attach ACD information to the call recordings.

CONFIGURATION SETTINGS

Listening Port

Enter the number of the port that is opened up on the OAISYS system that gets the information from the third party application.

Secure Listening Port

Enter the number of the secure port that is opened up on the OAISYS system.

Maximum Connections

This displays the maximum number of connections for activated licenses for the OAISYS system.

Available Connections

This displays the number of open licenses remaining on the OAISYS system.

RECORDING PORTS

This section is used for general information about your recording ports.

Settings

A red light indicates a non-operational status, and a green light indicates ports are connected and working; each section is discussed in further detail below.
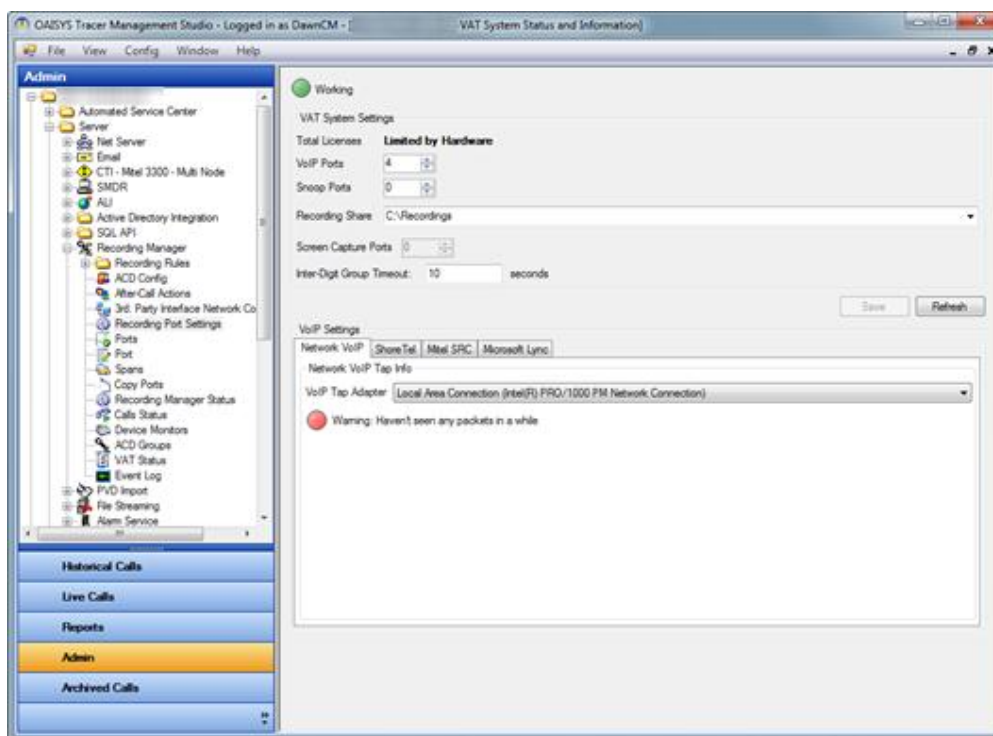
RECORDING PORT SETTINGS

Total Licenses

This displays the total number of connected recording ports on the OAISYS system, and represents the total number of voice port licenses.

VoIP Ports

This displays the total number of VoIP ports your system will use; this number cannot exceed the total number of licenses.

Snoop Ports

This displays the total number of ports used for Live Monitoring. These licenses are used dynamically; only one license is used for each Live Call monitored.

Recording Share

Select or enter the path of your recordings folder.

Screen Capture Ports

This option is only used for a Screen Recording Server; otherwise this option will be disabled. Select the number of screen recording licenses to use; this number cannot exceed the number of screen recording port licenses purchased.

Inter-Digit Group Timeout

This feature establishes the number of seconds between DTMF entries.

VoIP SETTINGS

Select the tab corresponding to your VoIP tap configuration (if applicable).

For more information, please refer to the PBX specific documentation located at: http://www.oaisys.com/documentation.aspx

Click **Save** → click **Refresh** to ensure changes have been saved

Ports

This displays quick view information for the port including:

- Port number
- Type
- Extension
- Status

This screen is used primarily for information, but you can access the individual port configuration by double-clicking on any port.
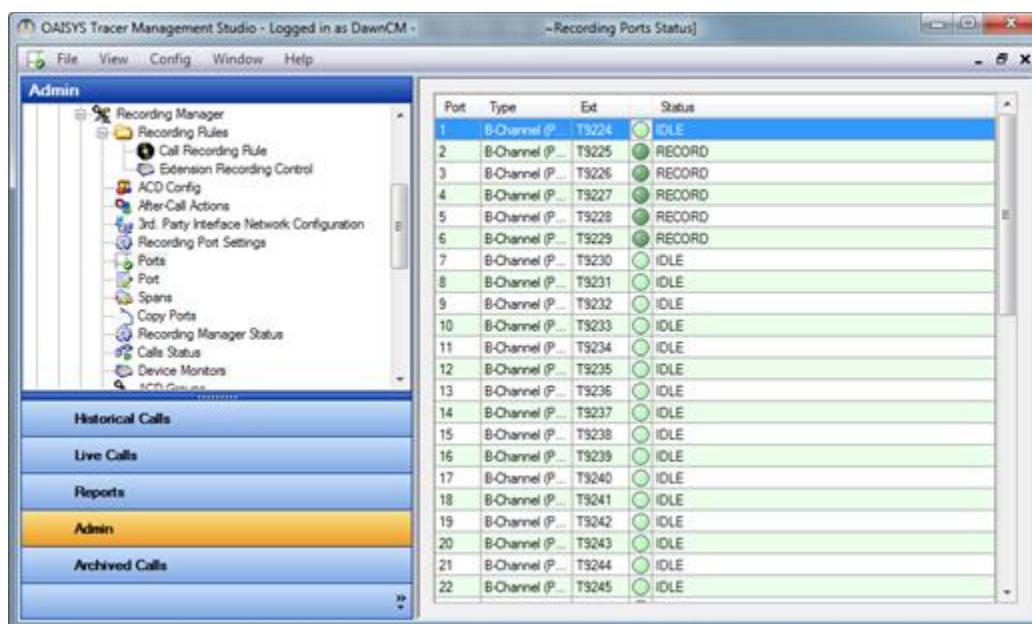
Port

This provides a detailed view of the port and allows you to view or configure from the port drop down list. The current status of the port you selected is displayed next to the port.

Check the *Enabled* box to allow the port to record. Enter the trunk number for the port and the VoIP board IP address or MAC address.

Port Type is automatically configured for the type of port the OAISYS Recording System is tapped onto.

Select the Trunk Type from the drop-down list.
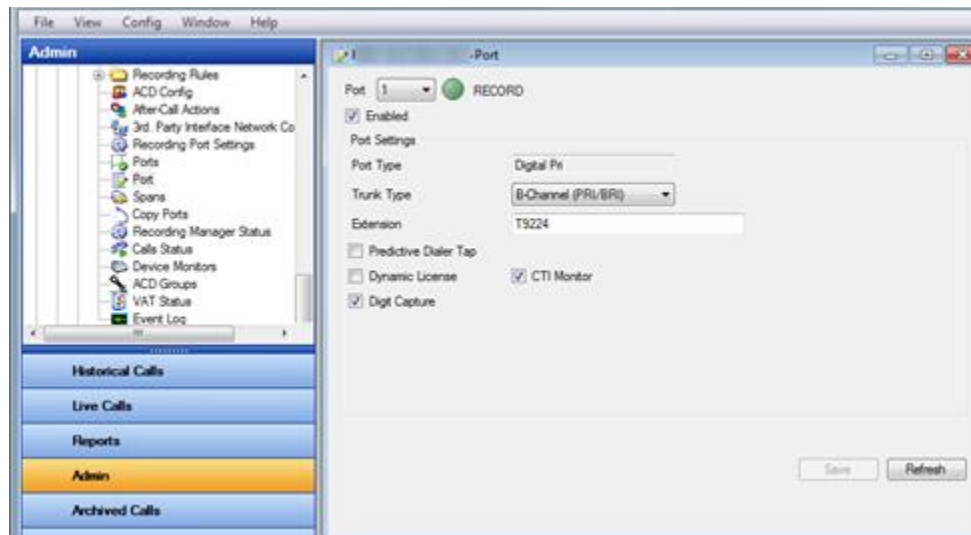
Predictive Dialer Tap

Check this box if tapping onto a Predictive Dialer (Tracer).

Dynamic License

Check this box to use On Demand or Dynamic Licenses. This will allow the port to be used on a first come, first served basis.

CTI Monitor

Check this box if the port is CTI enabled.

Digit Capture

By default, this feature is turned off. Check this box to enable digit capture.

NOTE: Available on digital stations using NGX boards, TDM Trunks, and analog and digital T1/PRI.

Late Binding

This feature is available for SIP station mapping for dynamic licenses. Our software will now reserve SIP licenses for designated devices. In prior versions, SIP licenses were consumed for every SIP device identified through the IP monitoring stream regardless of which devices were or were not recorded.

Thus, a customer with 100 SIP telephones wanting to only record a designated few, still required 100 SIP licenses. With version 7.2 or later, customers can acquire the precise number of licenses matching the
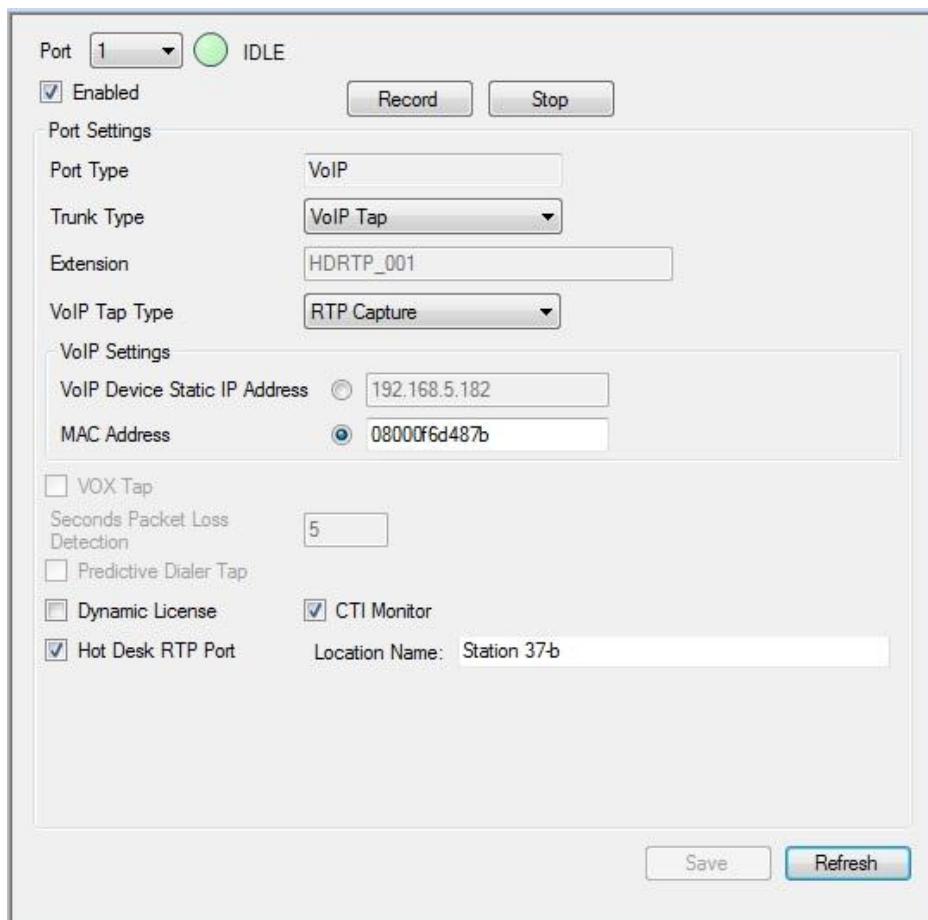
designated few phones to be recorded.
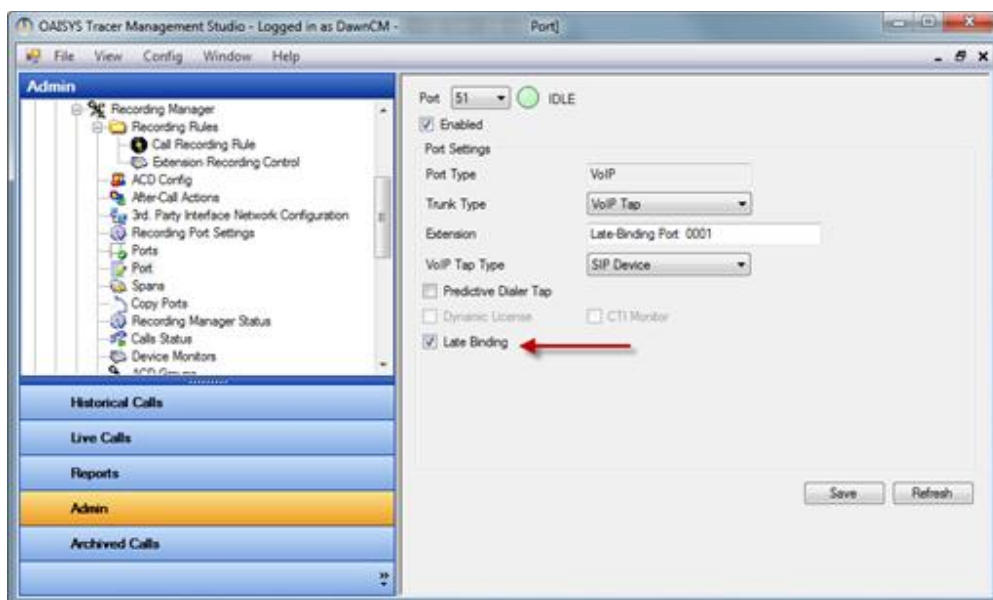
HOT DESK RTP

If using the Hot Desk RTP feature, select the Hot Desk RTP Port checkbox → this will bring up the Location Name to identify the station

Spans

Spans are used to allow configuration of OAISYS voice boards, and modify encoding, framing, and signaling details.
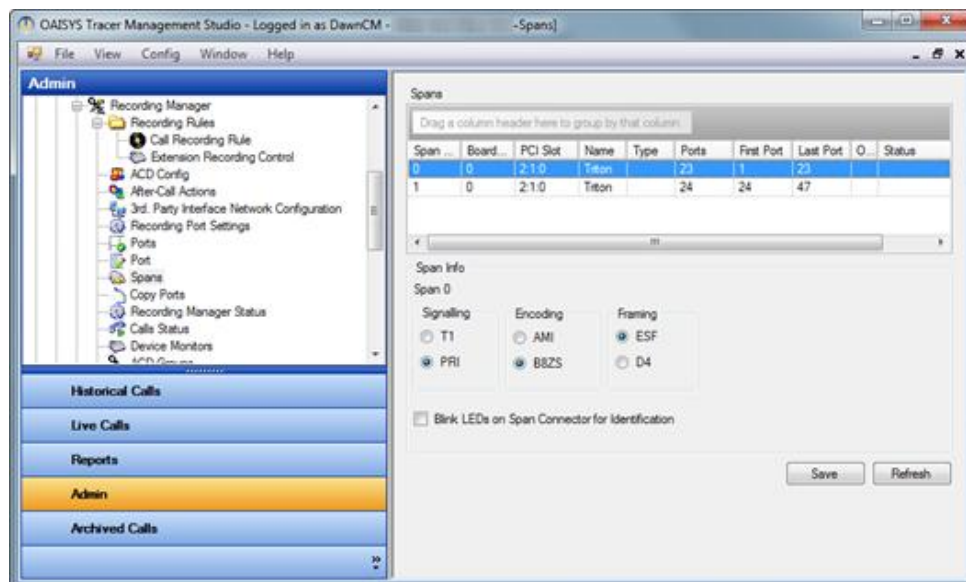
Copy Ports

This feature is used to copy settings from a previous recording port.

Using the drop down list, select the port to copy from → select one or more ports to copy to → click **Copy**
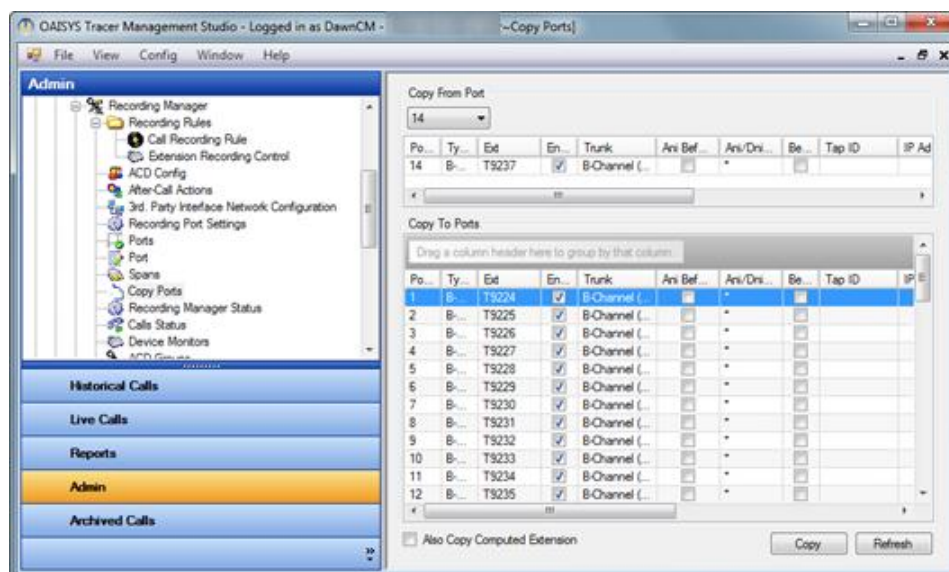
Recording Manager Status

This screen provides status information about the OAISYS recording solution including the operating status of:

- OAISYS server
- CTI link
- SMDR service
- SMDR port
- ALI Service
- ALI Port

A green light indicates the service is operational. A red light indicates the service is not operating. A non-lit button indicates the service is not applicable.

NOTE: The Archived Database will have its own rules and housekeeping settings.
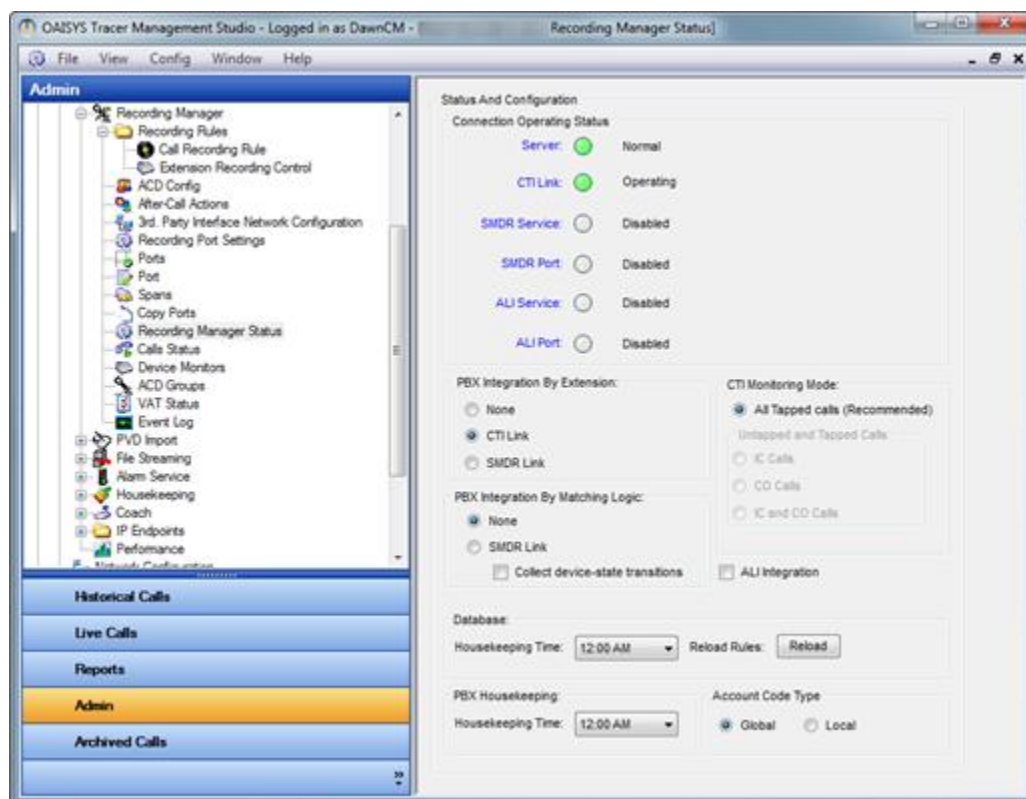
NOTE: The options used are determined by your system configuration.

Example

A system will not have both a CTI link and a SMDR link.

PBX INTEGRATION BY EXTENSION

This indicates where the OAISYS system is getting the extension information (when available). The available options are:

- None
- CTI
- SMDR

CTI MONITORING MODE

This indicates the calls that should be monitored by CTI. It is recommended that "all tapped calls" is selected. However, you may choose to monitor both tapped and untapped calls.

PBX INTEGRATION VIA MATCHING LOGIC

This indicates if the SMDR Matching Logic is used to attach extension information to calls recorded on SIP Trunks.

ALI INTEGRATION

This check box indicates the use of ALI integration.

DATABASE HOUSEKEEPING TIME

This shows the time the database settings for staging and purging are run. It is best to select a time when the system is not busy with recording calls.

RELOAD RULES

This button will reload the rules such as recording rules and after call actions immediately, rather than waiting until the pre-scheduled time for general Housekeeping and Database tasks.

PBX HOUSEKEEPING TIME

This shows the time the PBX settings for staging and purging are run.

ACCOUNT CODE TYPE

This option dictates if permissions are enabled for calls on a Global or Local level.

Calls Status

This view displays information about each call. A count of calls is displayed on the top bar.
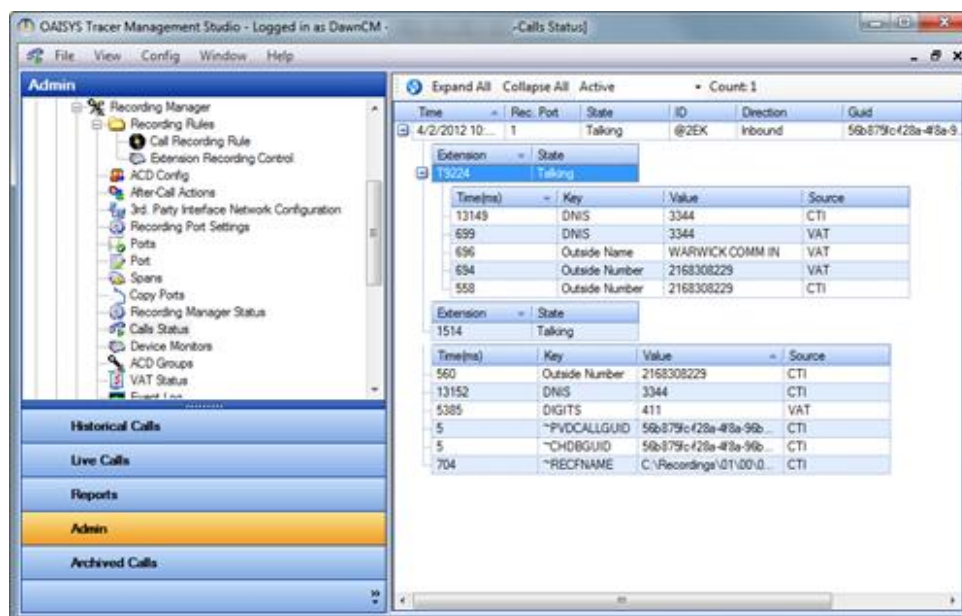
Select **Active** to display all active calls that are currently being recorded.

Select **Clearing** to view information about calls that are completed and are being cleared from the system.

The following information is available for each call:

- Date and Time of call
- Port used to record the call
- State of the call

- Call direction
- GUID (unique identifier)

You may arrange the column headers in any order by dragging and dropping them.

Device Monitors

This screen displays information about each recording port as well as provides a count for the total devices.

You may arrange the column headers by dragging and dropping them in place.

ACD Groups

This screen displays a count of the ACD Groups configured in the PBX. The name of the ACD Group (number) and the description is displayed. Use the plus/minus button to expand or collapse the view.

In the expanded view you will see the Agent ID, description of the agent, and the extension for the agent for each agent that is currently logged into the ACD Group. This window is used for information only; you cannot configure anything from this view.
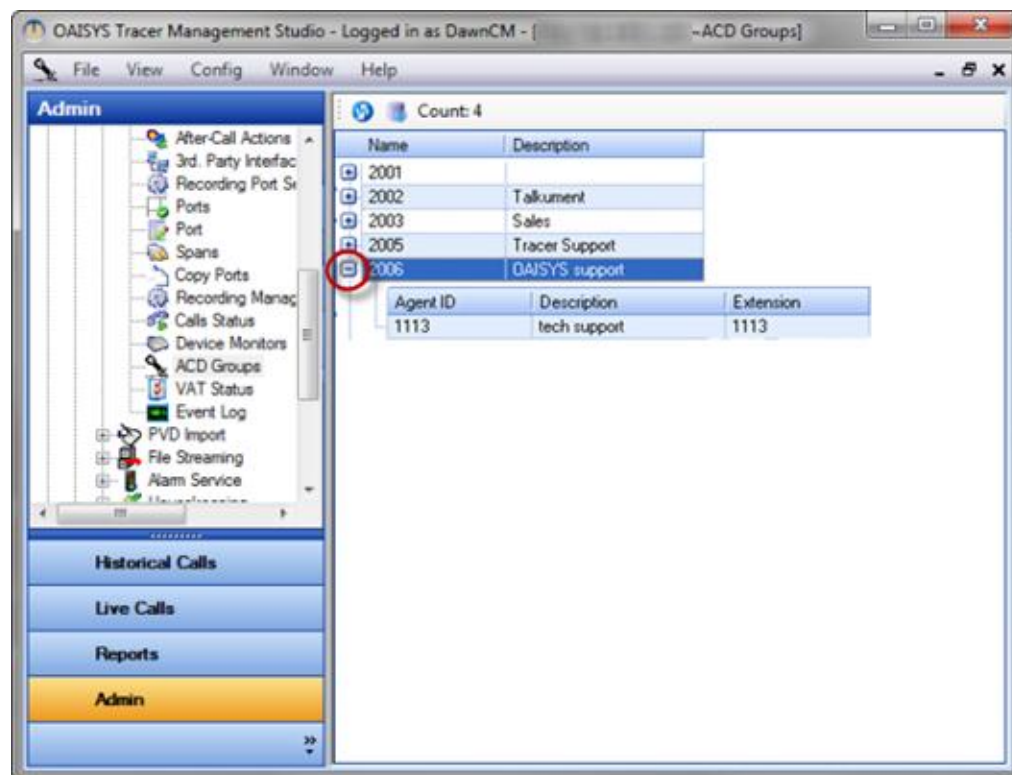
VAT Status

Use the color coded key on the right to determine each port's status. This view is for information only. Configuration cannot be done from this window.
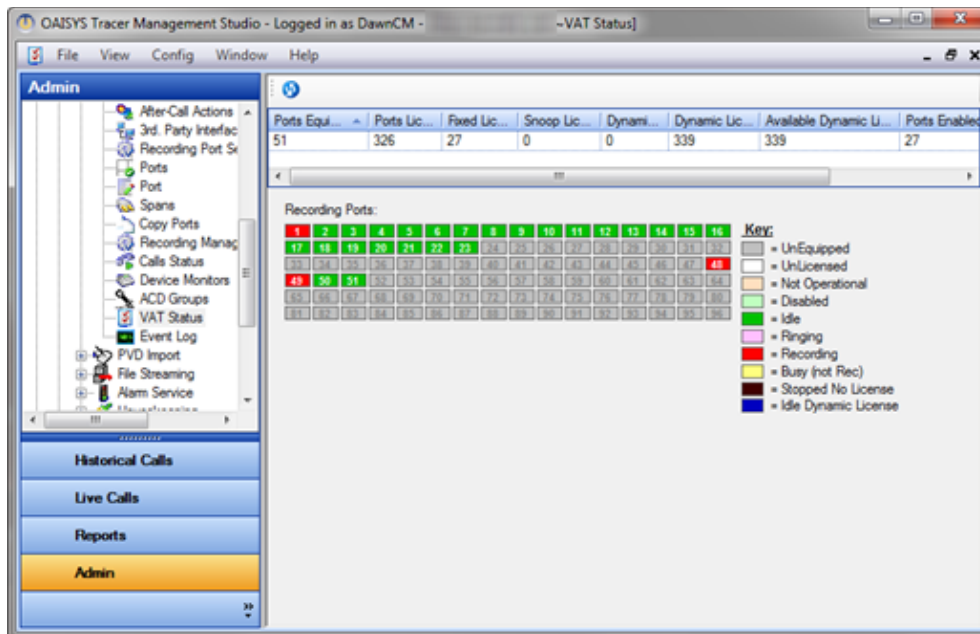
Event Log

The Event Log displays recording port events.
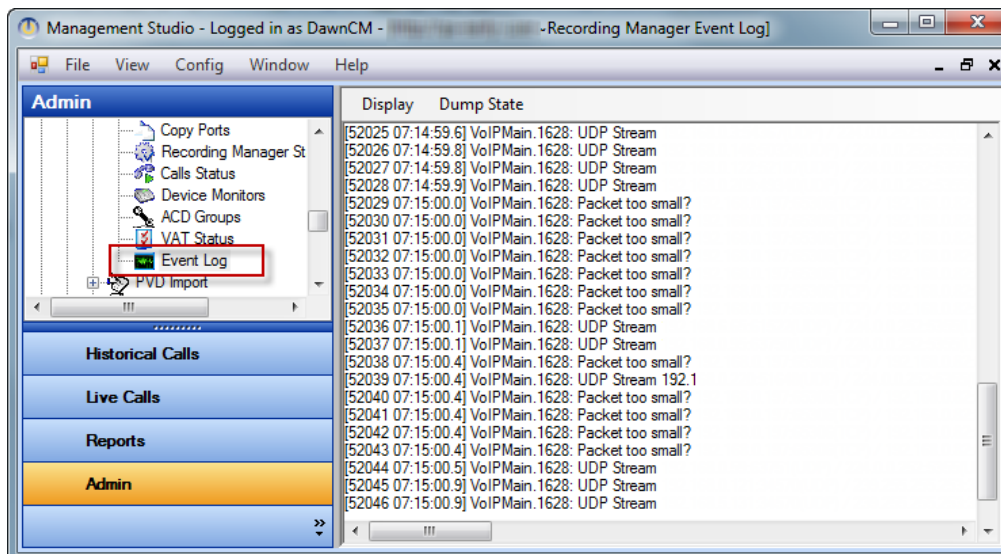
PVD IMPORT

PVD Queue

This screen provides information on PVDs that are in queue; i.e. they have not been written to the database yet.
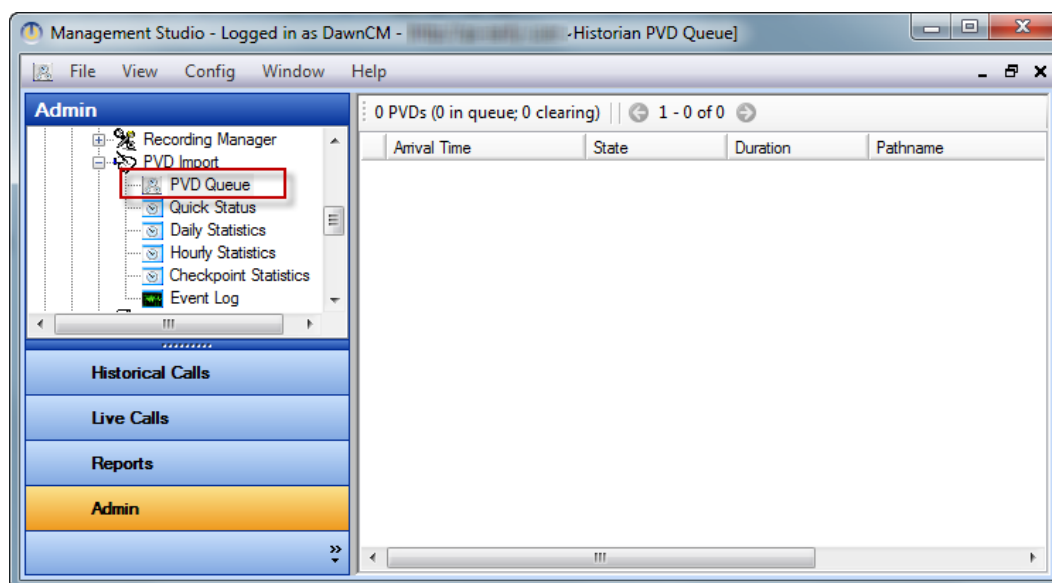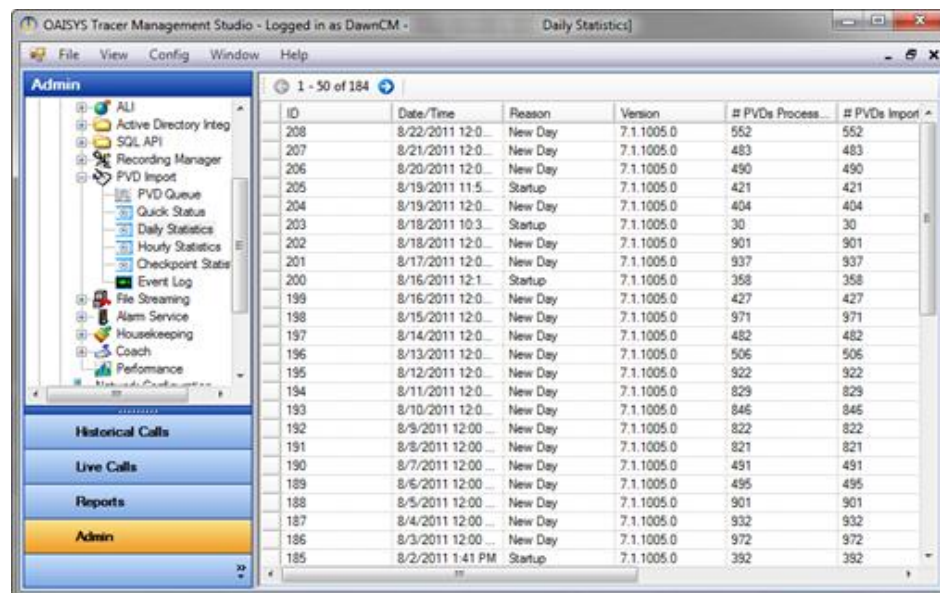
Quick Status

This view presents real time statistics about the PVDs. However, selecting a Time Range from the drop down list displays the number of PVDs imported within that time frame along with the Total, Average, and Maximum execution time. The Failed Imports and Maximum PVD queue size within the selected time frame is also displayed.
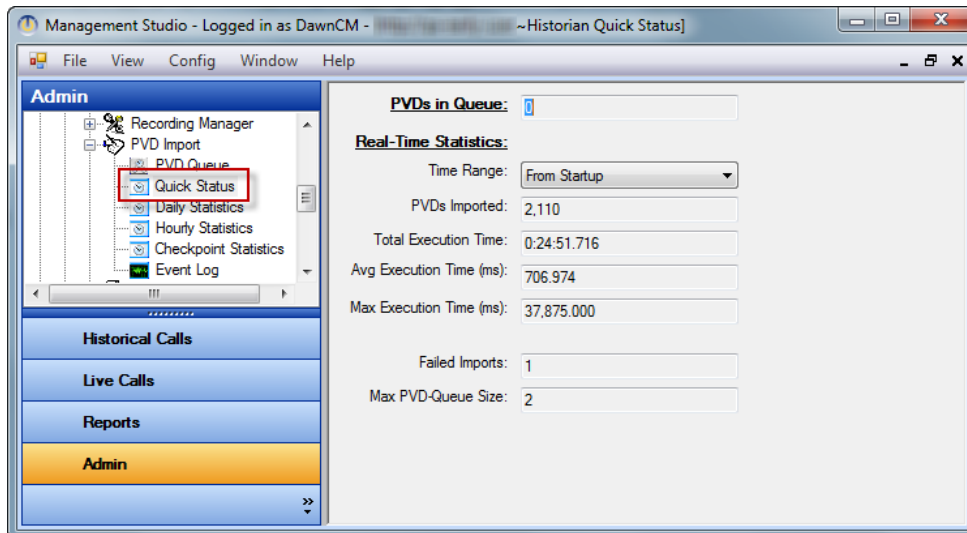
Daily Statistics

Statistics summarized by day.

Hourly Statistics

Statistics summarized by hour.

Checkpoint Statistics

Checkpoint statistics are used primarily for troubleshooting purposes.
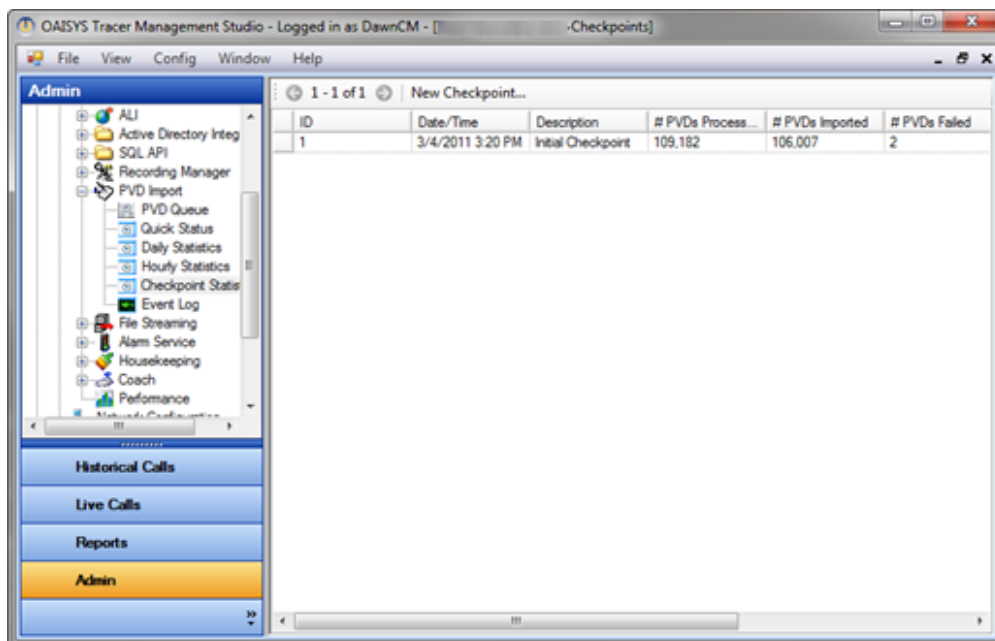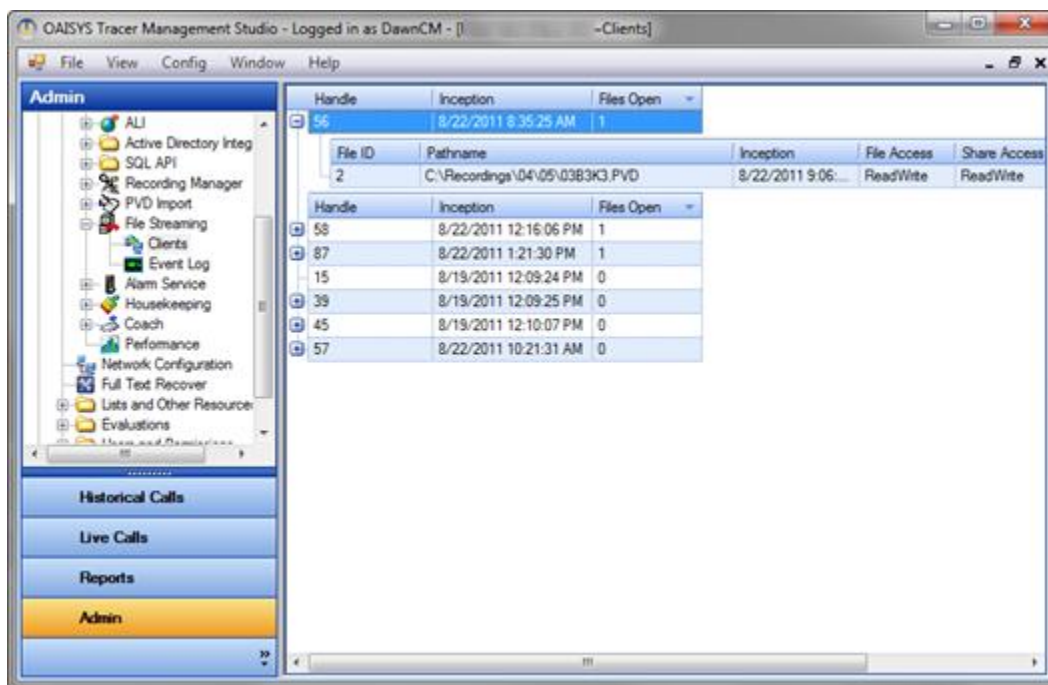
Event Log

This displays PVD import events.

FILE STREAMING

Clients

This screen displays the handle and inception information for the files that are being streamed, and is primarily used for troubleshooting purposes.

Event Log

This displays events regarding the File Streaming service.

ALARM SERVICE

The OAISYS recording solution provides four levels of alarms:

1. Critical
2. Major
3. Minor
4. Informative

Once an alarm condition is met, the following actions can take place:

- Send an email
- Start an application
- Notify OAISYS Service Center
- Send a service command

Example

If a recording port is not recording, the alarm generated will alert an administrator via email so they can find out why the port is not recording.

NOTE: Log files with alarm activity are kept in the system.

Settings

These settings apply to alarm history files and informational history files. Indicate the total number of files and maximum size of each file.

Indicate the amount of time to keep the files.
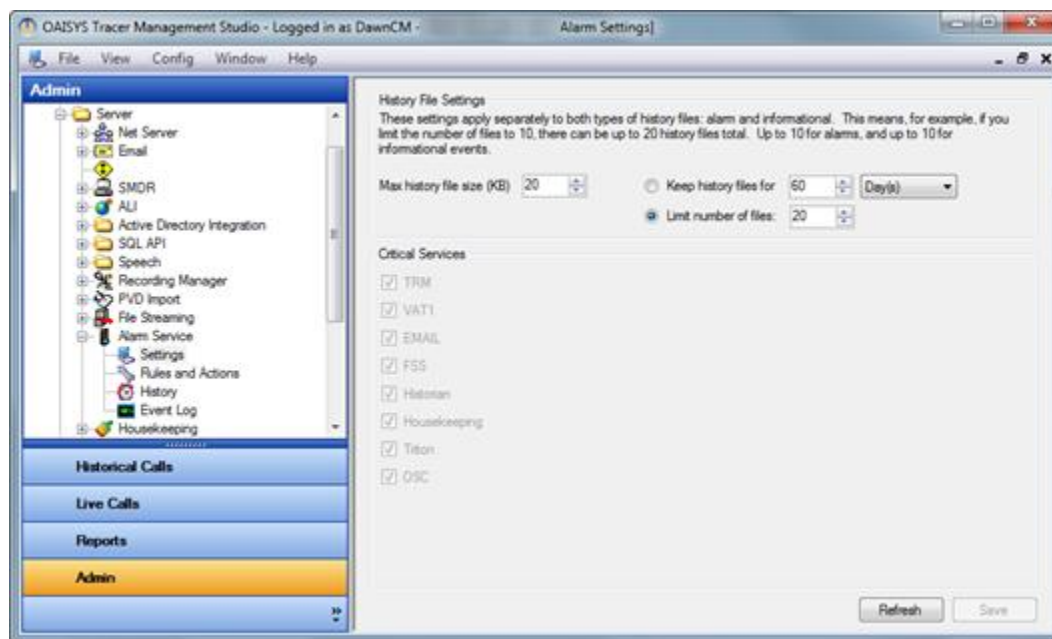
Rules and Actions

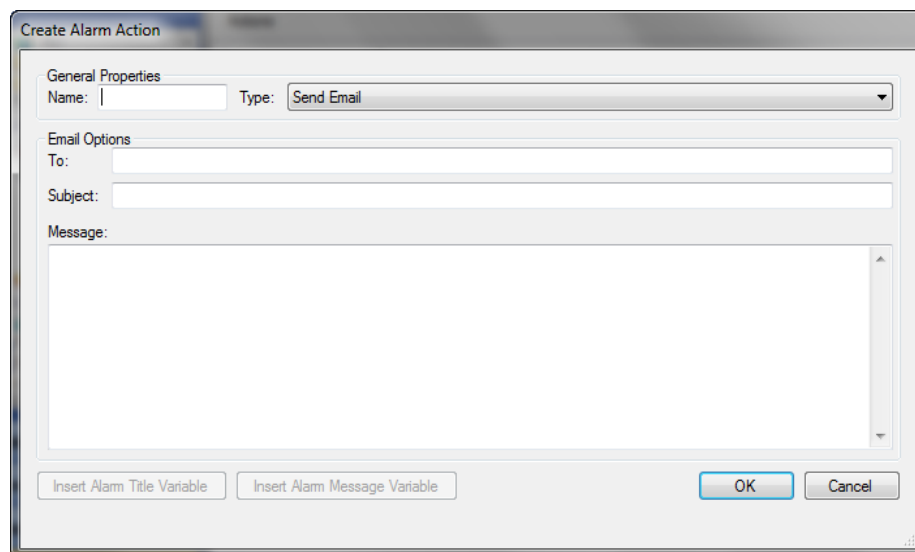These rules and actions are executed when an alarm condition is met.

Click the **Add** button to add a new rule.

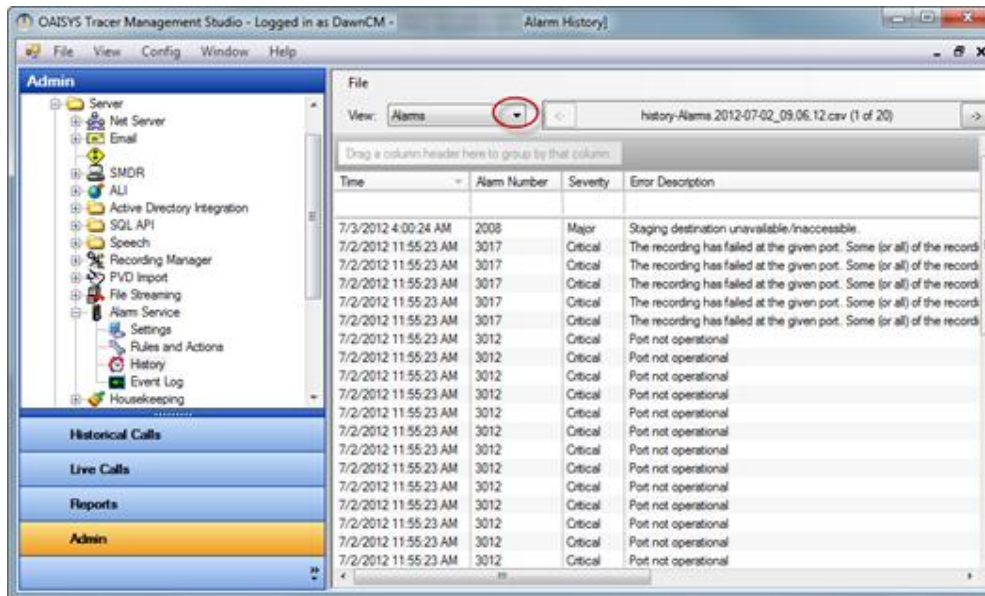### SAMPLE ACTIONS

- Send an email
- Start an application

SAMPLE RULE

- Send an email when a port is not responding

History

This displays a history or log of alarms including the error description, date, and time of the alarm occurrence. A complete list of alarms and informational alarms are found here: Appendix A
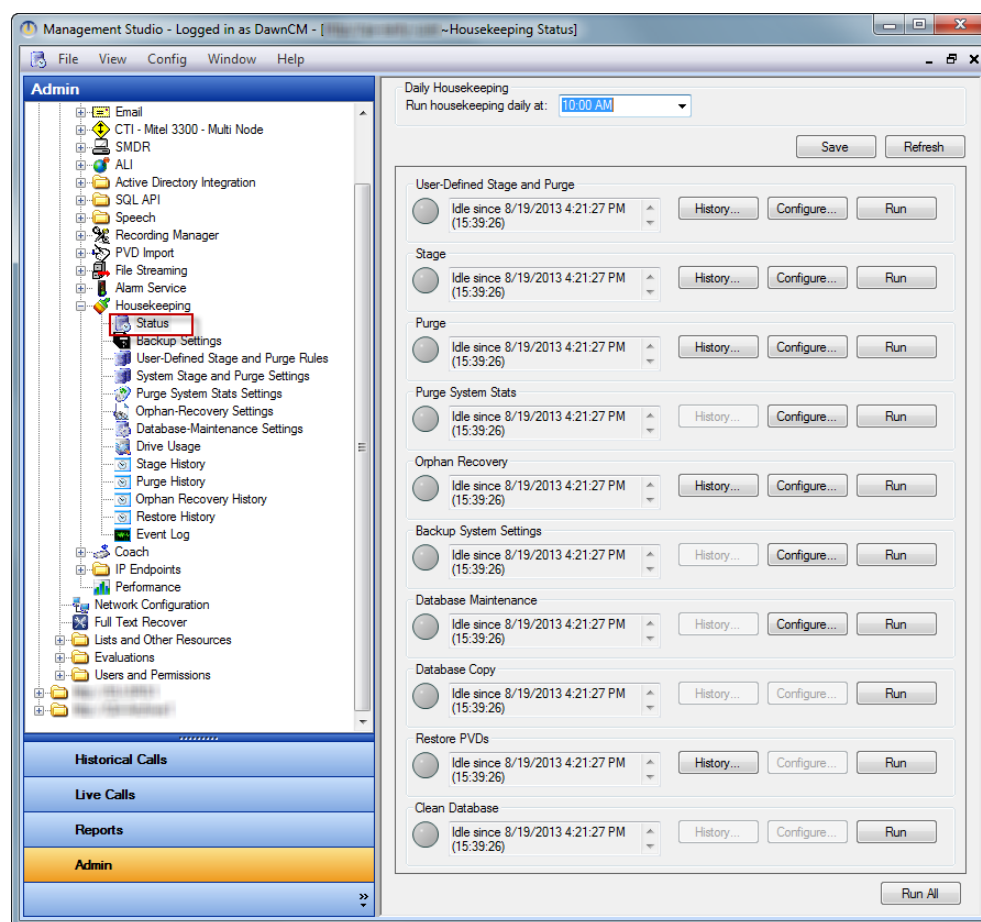

Event Log

This displays events for the alarm service.

HOUSEKEEPING

Status

Indicate the time for the OAISYS system to perform the daily housekeeping tasks. You can view history, configure, and run the Staging, Purging, Orphan Recovery, Backup, and Restore functions individually from here.

HISTORY

This displays a detailed history of the selected function.

CONFIGURE

This allows you to configure the housekeeping tasks.

RUN

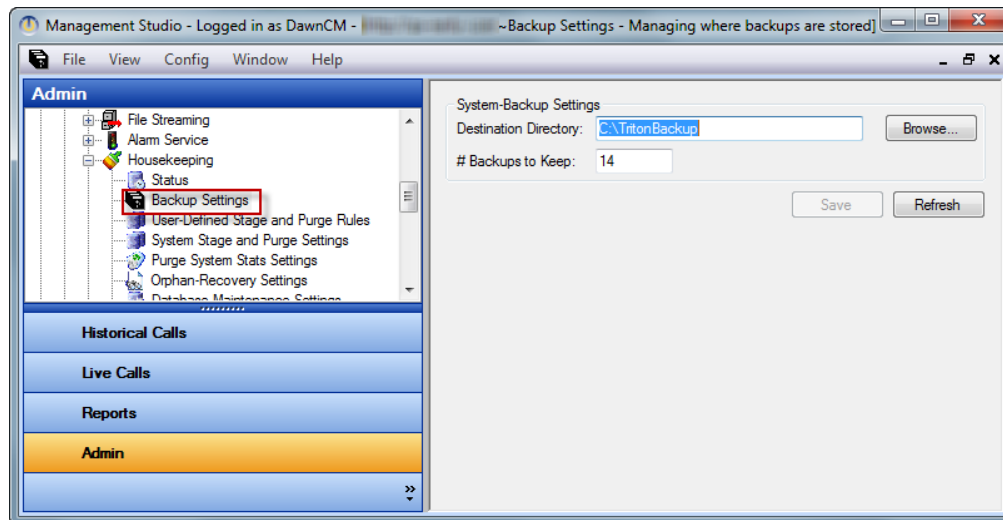This allows you to run the housekeeping task.

RUN ALL

This option allows you to run all housekeeping tasks now, instead of at the previously scheduled time.

Backup Settings

Browse or enter the path to the directory location to save your backup settings. Indicate the number of backup files to keep.

User Defined Stage and Purge Rules

This new feature allows customers to stage and purge calls based on call filters or specific identifying information, and allows users to select the media type.

Example

Calls are set to purge after six months, but certain accounts must be kept for three years. This feature overrides the purge rule for accounts with special conditions.

Another use of this feature is staging based on identifying information.

Example

Vendors have discrete FTP sites; this feature enables identification by DNIS.

Select one or more call filters from the available call filters. Move them over to the Call Filters Used panel using the double arrows.
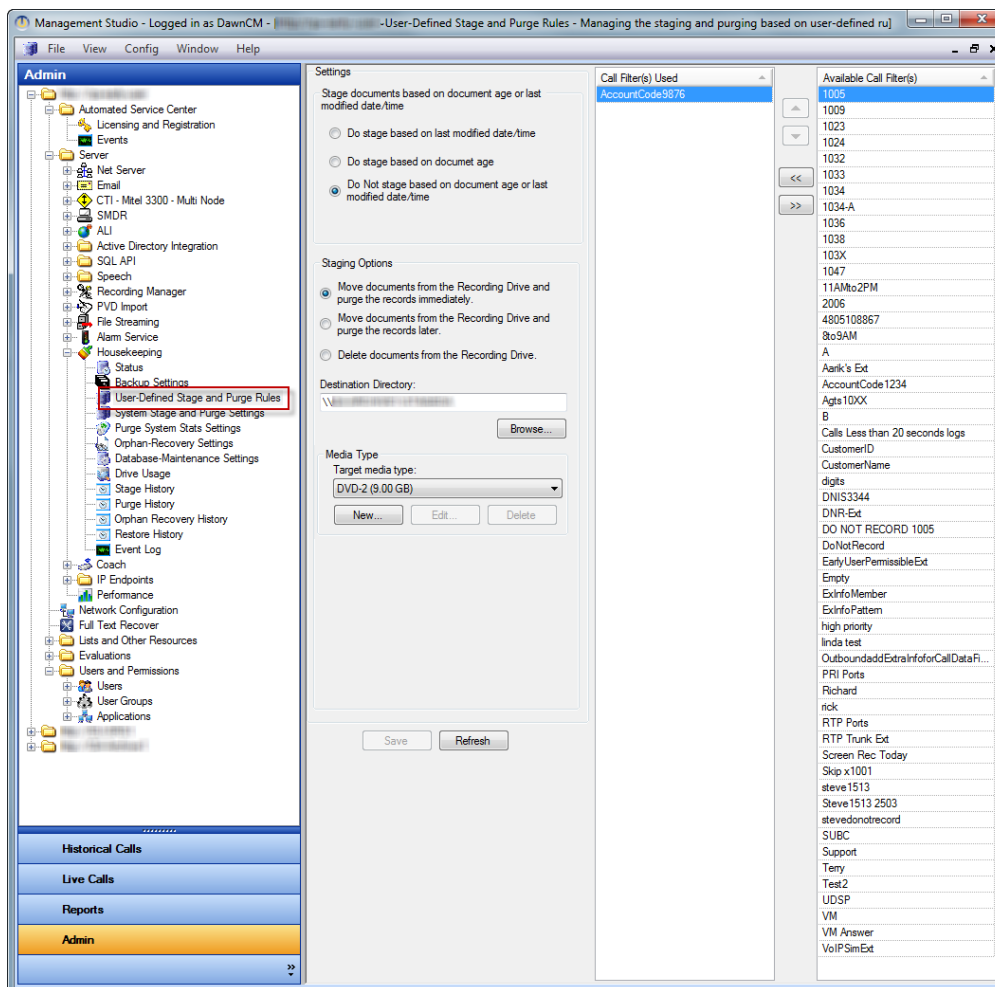
# System Stage and Purge Settings

This is used to indicate preferences for System Staging and Purging.

- Select an option to stage based on document modify date/time
- Select to stage based on the percent of hard-disk usage
- Select to purge based on the percent of database usage
- Select an option to move or delete documents from the Recordings Drive
- Select the media type from the drop down list or select a new media type
- Select an option to purge based on modify date/time
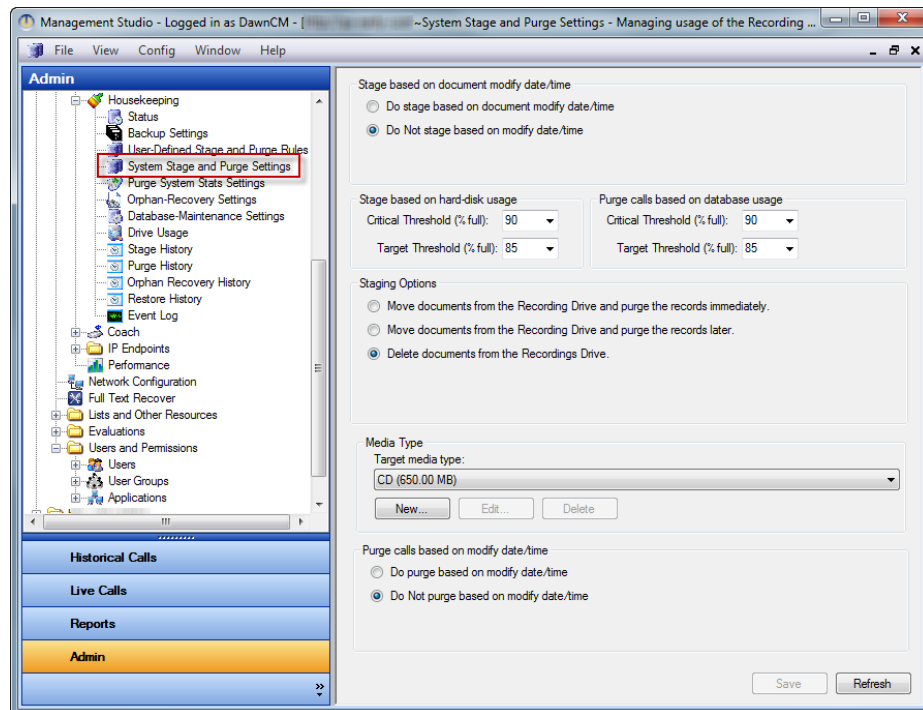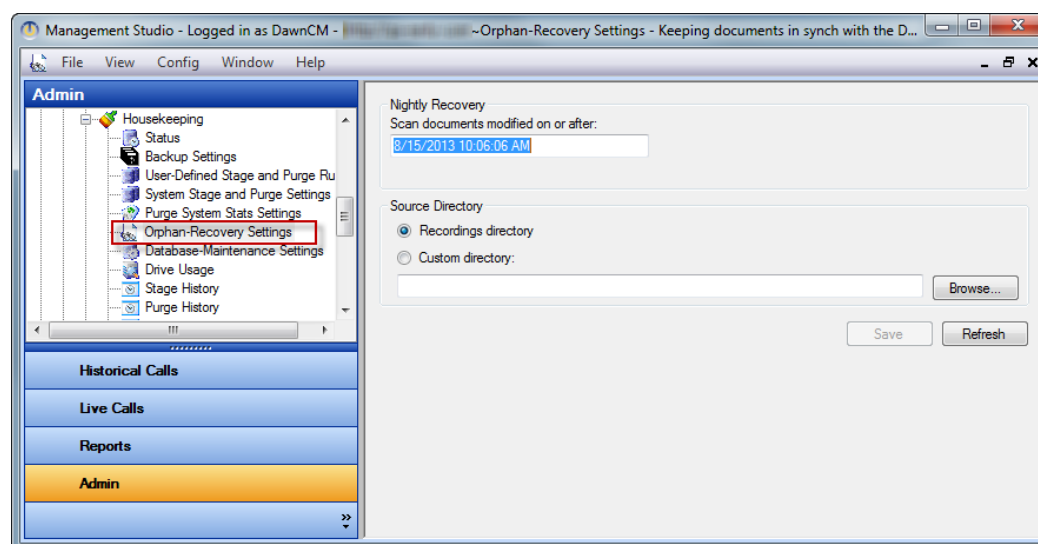
Purge System Stats Settings

This setting is used to purge the system statistics from the database.
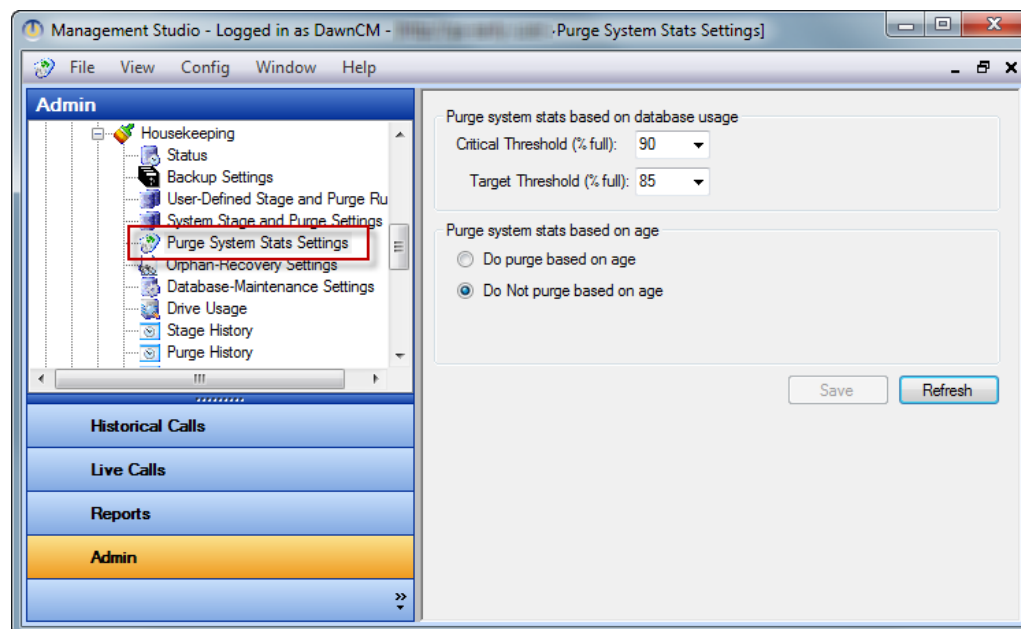

Orphan Recovery Settings

This screen dictates how you handle Orphan Recovery.

Scan documents modified after the specified date and time for the nightly recovery → indicate the frequency of the full system scan

Database Maintenance Settings

This screen allows you to establish Database Maintenance Settings.

Use the drop downs on this screen to determine how often you'd like to perform Defragging and Rebuilding of the indexes in the database.
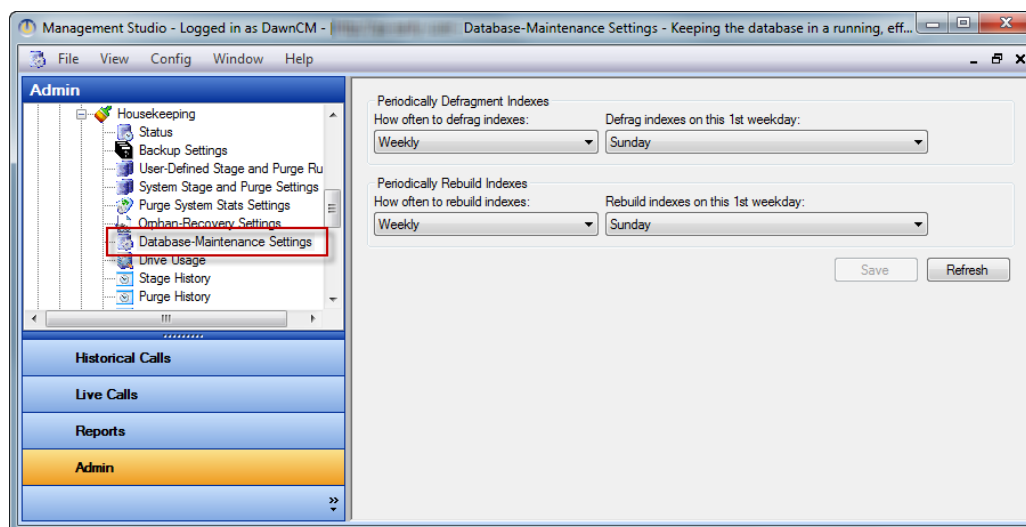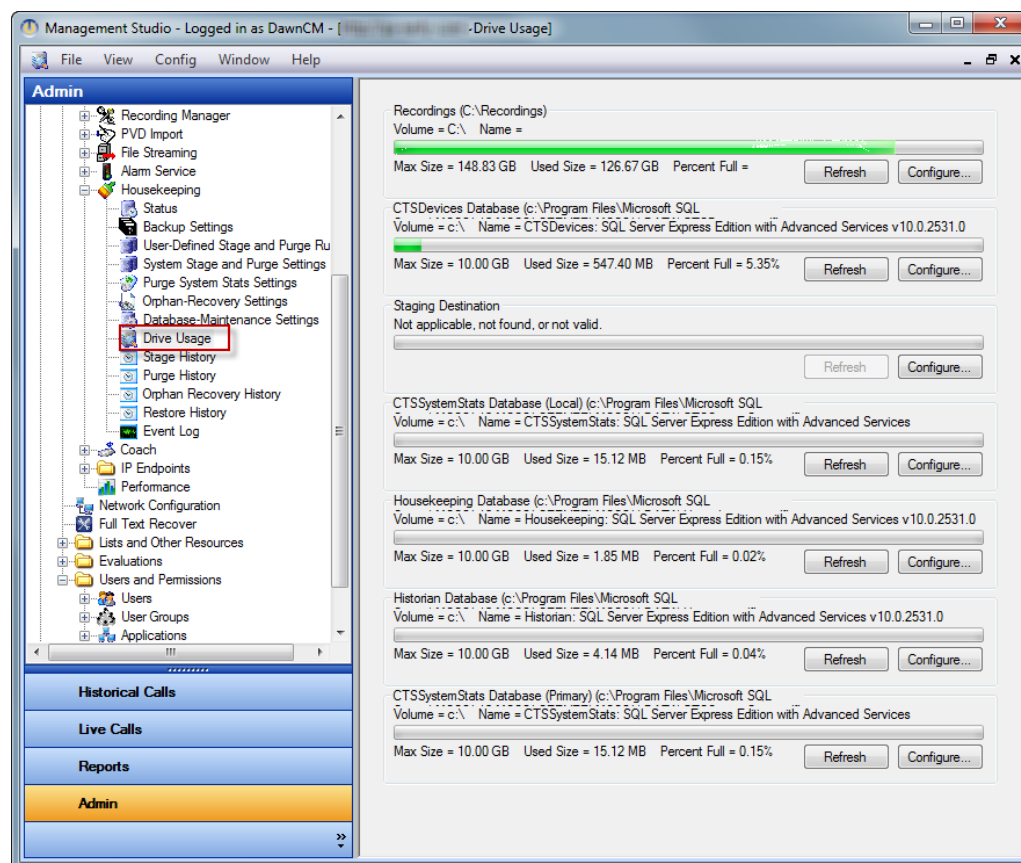

ARCHIVE ONLINE DATABASE

This feature provides the ability to archive calls from the online database to an archival database; the archival database will serve as a secondary database to the online database. A new search and playback application can be directed to this database to find archived recordings.

Drive Usage

The information in this screen can be used to determine how much disk space your system has used for call recordings, SQL database, etc.
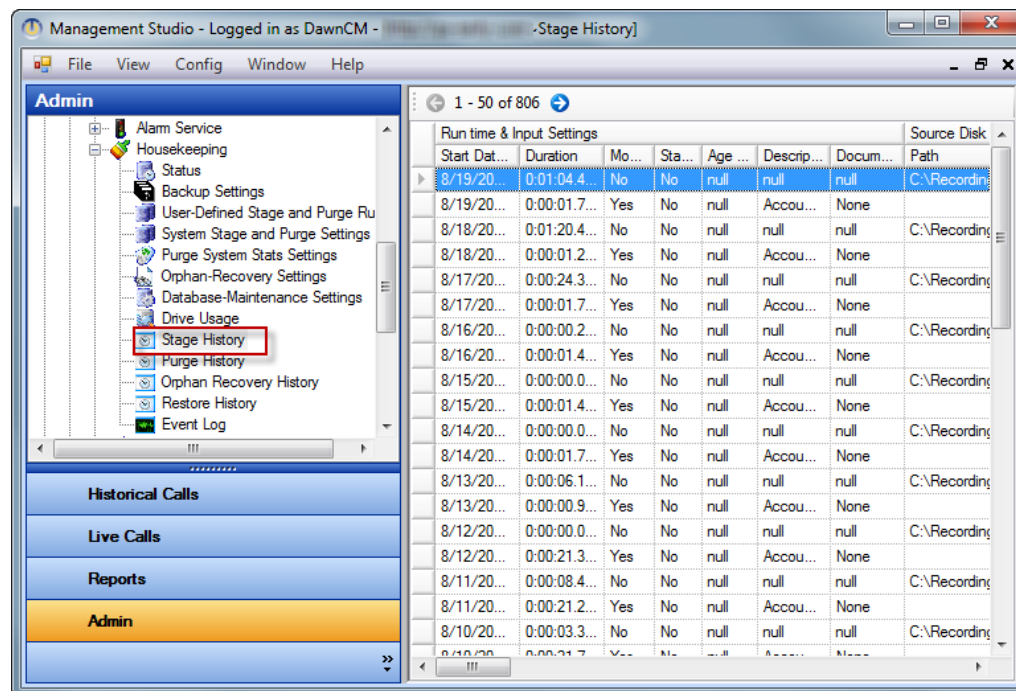
Stage History

This section displays the history for the staged PVDs.

Purge History

This section displays the history for the purged PVDs.

Orphan Recovery History

This section displays the history for the orphaned PVDs that have been recovered.

Restore History

This screen displays the history for the PVDs that have been recovered.
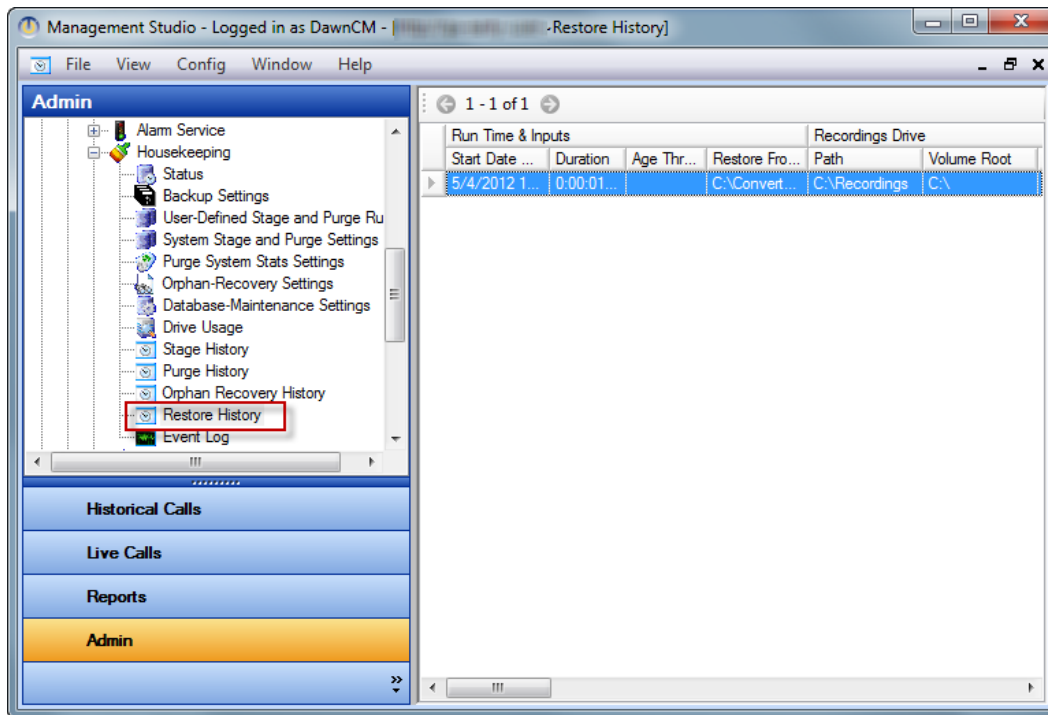
Event Log

This displays events for the housekeeping tasks.
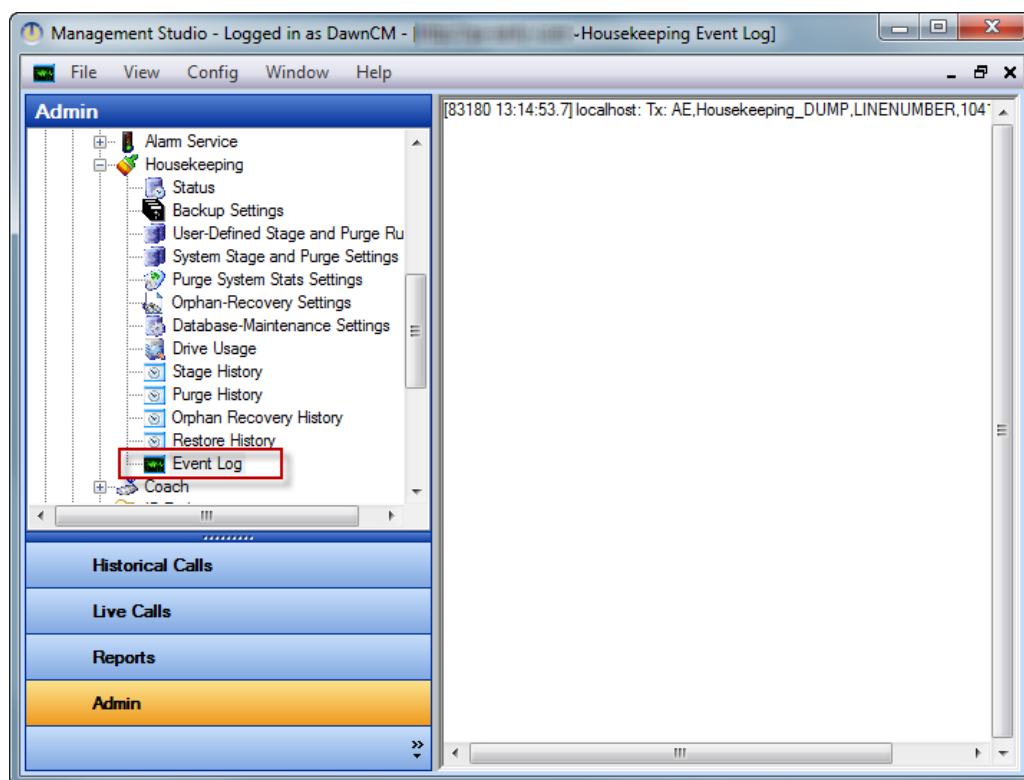
IP ENDPOINTS

This section is used to enter information about the SIP Endpoints (i.e., Edge Device(s) or SIP phones) when SIP Trunks or SIP Stations are recorded; click the Plus sign to add a new SIP Endpoint (use the Edit, Copy, and Delete buttons accordingly).
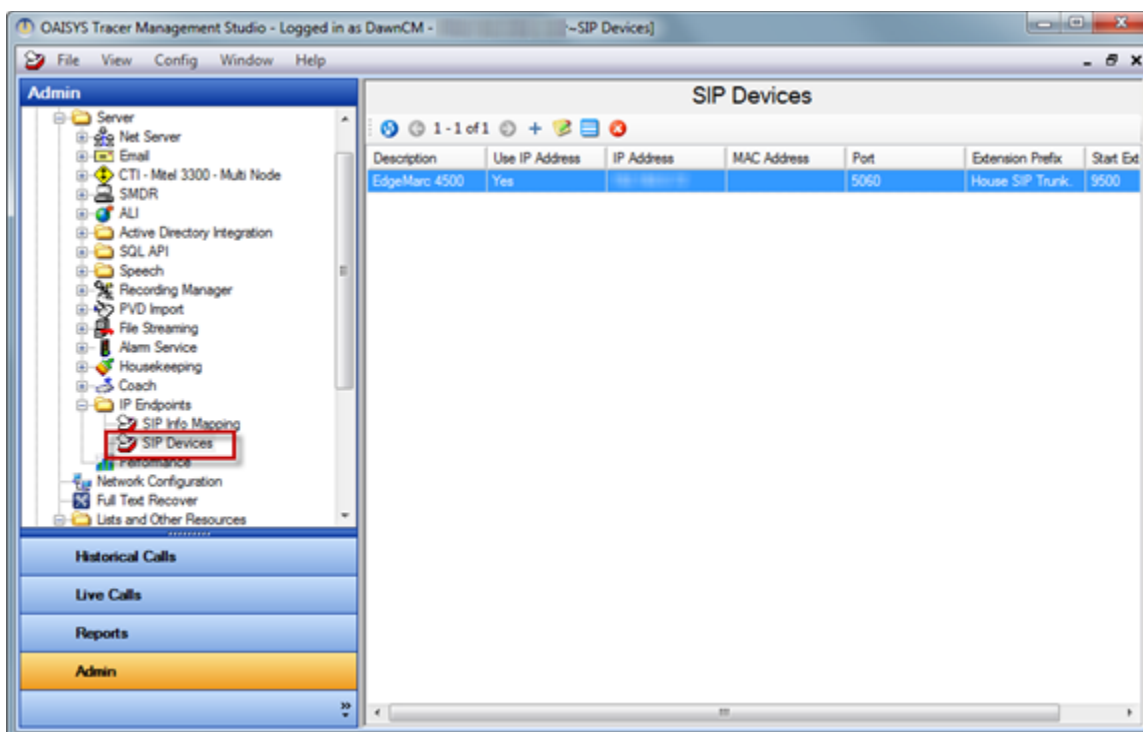
SIP CALL MAPPING
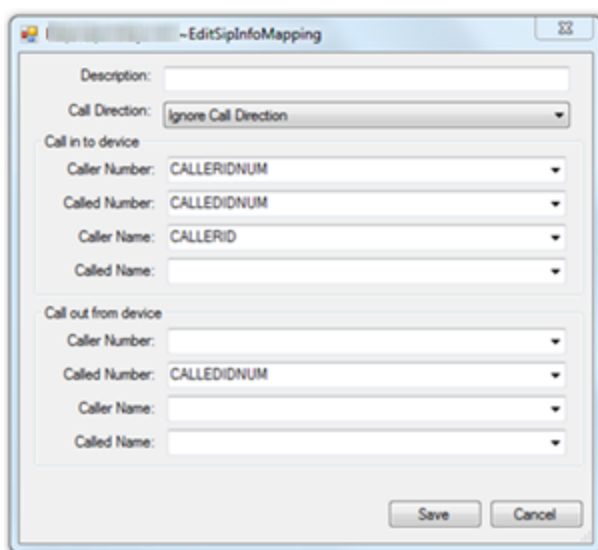
This feature allows the user to assign the mapping of the following information:

- SIP URI in the To field
- SIP URI in the From field
- Display name in the To field
- Display name in the From field

To the following OAISYS fields:

- Extension field
- Agent ID field
- ACD Group
- Outside name
- Outside number
- DNIS/DID
- Extra Call Info field

The caller name and called name are reported in SIP and can be mapped or ignored. Call direction can also be ignored, but still captured as SIP-info fields and mapped. SIP-call info mapping details are now programmed into profiles, making it easier to share settings among various SIP devices without opening and changing each SIP device.

SIP DEVICE DETAILS

This screen allows you to enter the SIP Device details; the specific elements are discussed in further detail below.

Description

Enter a unique description for the SIP Device.

IP Address

Enter a unique static IP address for the SIP Device.

MAC Address

Enter a unique MAC address for the SIP Device.

NOTE: Either an IP Address or a MAC address is required.

Port

Enter the port used for the SIP Device; typically this is 5060.

SIP Device Type

Select the type of SIP Device from the drop down list:

- SIP Trunk
- SIP Station
- Generic SIP Device

Call Direction

Select if traffic into the device should be considered an inbound or outbound call from the drop down.

Extension Options

Select from the following options:

- Auto Generate
    - Select this option if the PBX and /or Gateway do not reliably use the to/from field to communicate the trunk extension over SIP. If this option is selected you must enter the Extension Prefix, the extension number you wish to start with, and an extension sample.
- SIP to/from Digits
    - Select this option if the PBX and/or Gateway reliably use the to/from field to communicate the trunk extension over SIP.
- Fixed Extension
    - Enter a fixed extension for your SIP Device.

NOTE: If you do not know which option to select please contact OAISYS Support for assistance.

The options listed under coaching provide information about the coaching application such as what calls are available for coaching and active coaching sessions.
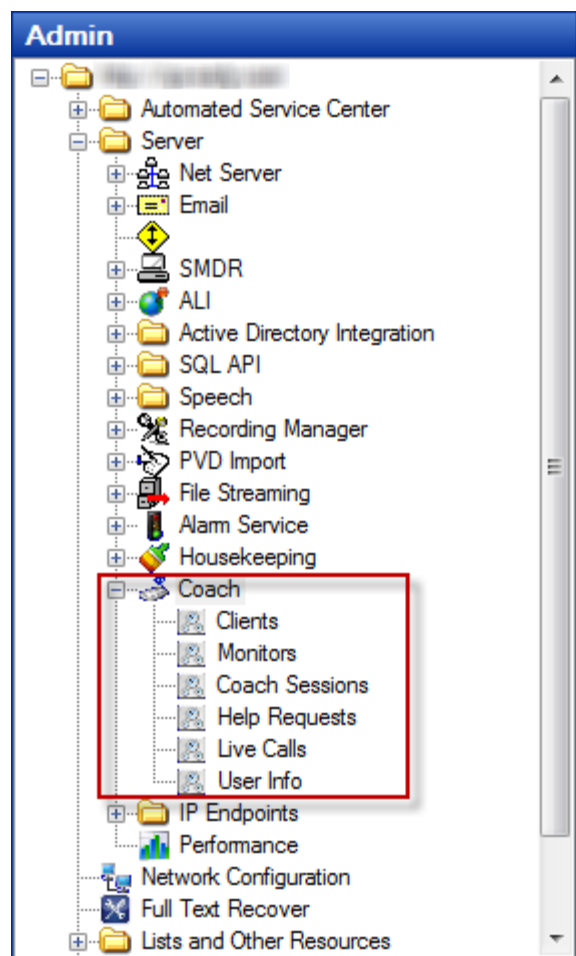
Clients

This section provides a list of user names and user types that are currently logged into the OAISYS system with coaching permissions enabled. User types that can coach are Call Agents and Call Managers.

Monitors

This section lists all monitors on coaching sessions.

Coach Sessions

This section displays coaching sessions in progress.

Help Requests

This section displays active help requests from call agents to supervisors.

Live Calls

This section displays the live calls with active coaching sesssions.

User Info

This section displays users available for coaching.

This section is primarily used for troubleshooting purposes. Configuration cannot be done under this section.

NETWORK CONFIGURATION

The following sections address network configuration for the OAISYS system.
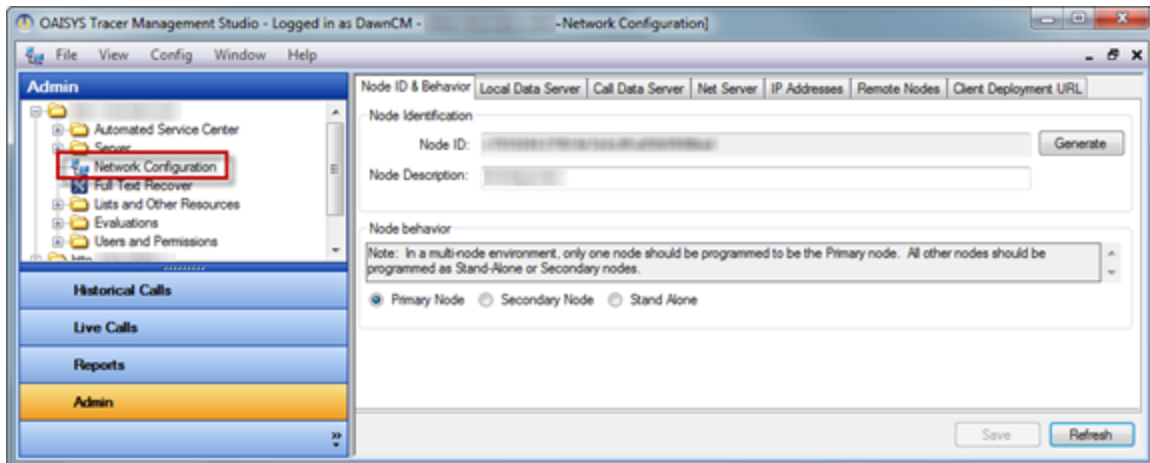
NODE ID & BEHAVIOR

The node ID is used to identify unique nodes, and is used for processes such as orphan recovery. It is highly discouraged to generate a new node ID once one has been established as this may interfere with existing processes.

NOTE: The Archive Database will show up as a node – OAISYS currently only supports one (1) Archived Database.
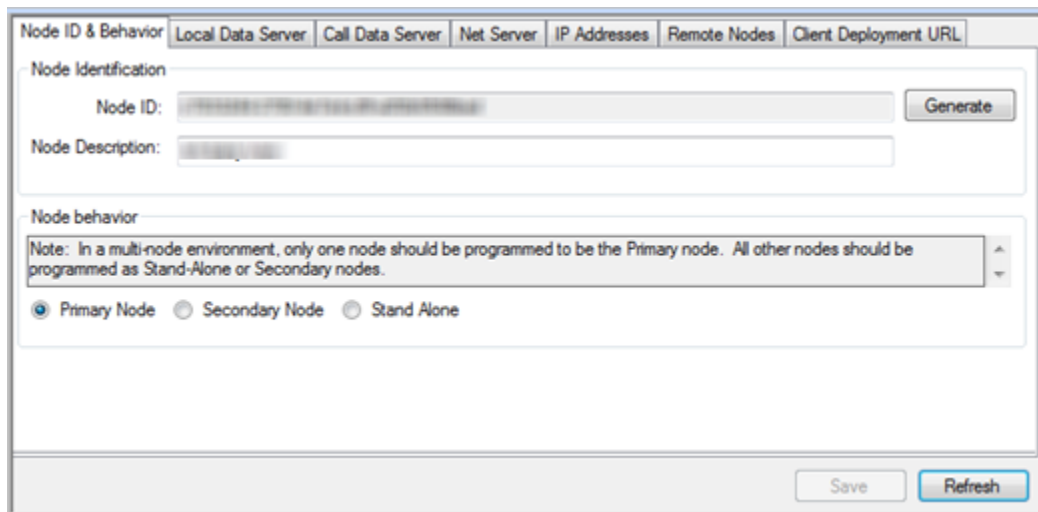
The attributes are discussed in further detail below.

NODE DESCRPTION

Enter a description to identify the node.

NODE BEHAVIOR

Select the radio button to identify the network configuration.

Primary Node

This is the primary node in a network of two or more OAISYS systems.

Secondary Node

This is one of two or more OAISYS systems that are networked together and this node is not designated as the primary node.

Stand Alone

This is indicative of only one OAISYS system in a network.

LOCAL DATA SERVER

The Local Data Server is used to define the instance name for the local databases of each OAISYS Server when using SQL named instances.

NOTE: In a multi node OAISYS Server configuration, this must be configured on each OAISYS Server's Network Configuration independently. If using the default instance, this remains blank.

CALL DATA SERVER

The Call Data Server tab is used to define the primary call data server which hosts the primary databases. In a multi node OAISYS Server configuration this must be configured on only the primary node. This will be communicated to secondary nodes by the primary.

SERVER NAME USED BY LOCAL CLIENTS

This defines the hostname of the primary call data server as it concerns clients running locally on the OAISYS Server. If the primary databases are hosted locally on the OAISYS Server it is recommended you use "localhost".

SERVER NAME PUBLISHED TO CLIENTS ON THE LAN

This defines the hostname of the primary call data server as it concerns clients running on the LAN.

SERVER NAME PUBLISHED TO CLIENTS ON THE WAN

This defines the hostname of the primary call data server as it concerns clients running on the WAN.

If using SQL named instances enter the server name and instance name in this format "server name\instance name".

NET SERVER

This tab lets you define the Net Server and port that the clients will connect to as well as enable or disable compression of the communication.

LOCAL CLIENTS

This defines the Net Server and port for clients running locally on the OAISYS Server. Typically this will be "localhost".

LAN CLIENTS

This defines the Net Server and port for clients running on a LAN.

WAN CLIENTS

This defines the Net Server and port for clients running on a WAN.

IP ADDRESSES

This where you define the internal address of your firewall and additionally where you set the address ranges for Local and LAN clients. Client connections being attempted from addresses outside of the defined ranges will be considered WAN and the connection will be attempted over the defined WAN port.

Click the Add button to enter the various ranges of IP addresses for clients accessing the OAISYS system.

Use the Edit button to change information about the range.

Use the Delete button to delete a range of IP addresses.
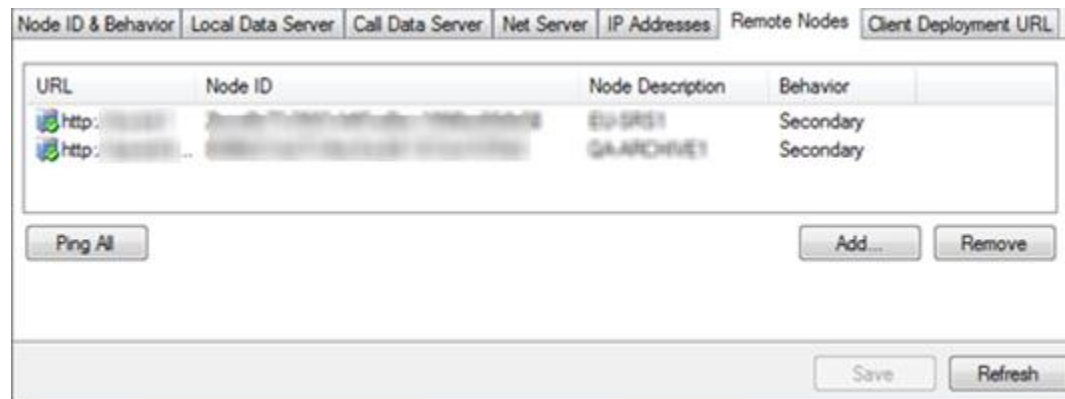
REFRESH

Click refresh to update the screen with recent changes.

REMOTE NODES

This section displays any networked nodes.
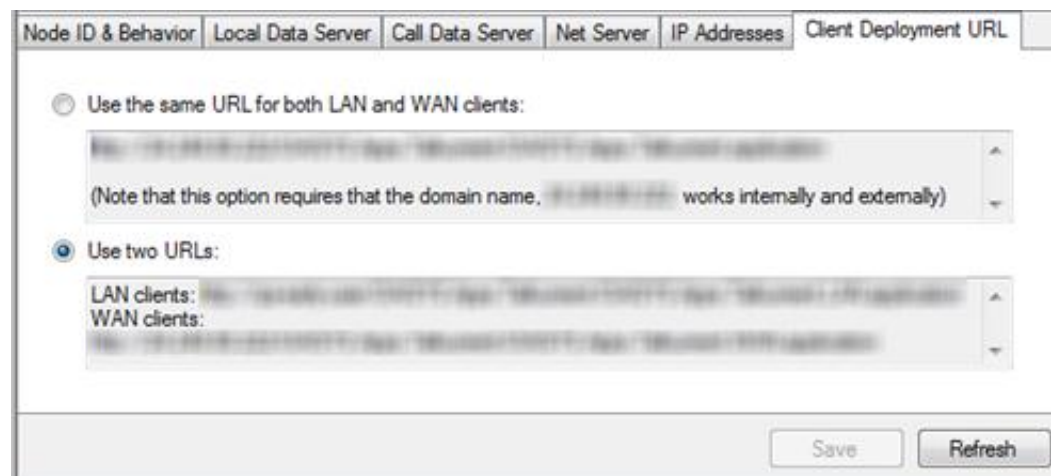
CLIENT DEPLOYMENT URL

Indicate whether or not to use the same URL for both LAN and WAN clients or use different URLs. If you wish to use one URL the domain name must work both internally and externally.

FULL TEXT RECOVER

This section allows the administrator to re-index the Full Text Catalog in SQL when a "Full Text Mode Catalog Error" message appears.
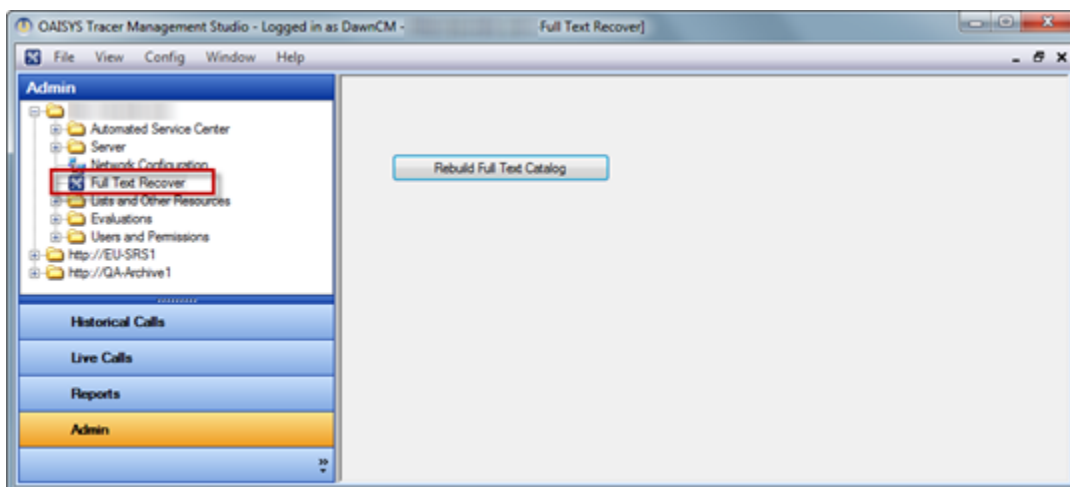
LISTS AND OTHER RESOURCES

The Lists and Other Resources section of the OAISYS Administrator consists of five sub-sections (listed below), and an additional resource entitled IP Endpoints:

1. Lists
2. Calls
3. Area & Office Codes
4. Extra Call Info fields
5. Actions

Administrators use the **Lists** section to create lists to define the call filters user permissions are based on. The lists and call filters created here are used throughout the OAISYS Administrator to populate several drop-down lists.
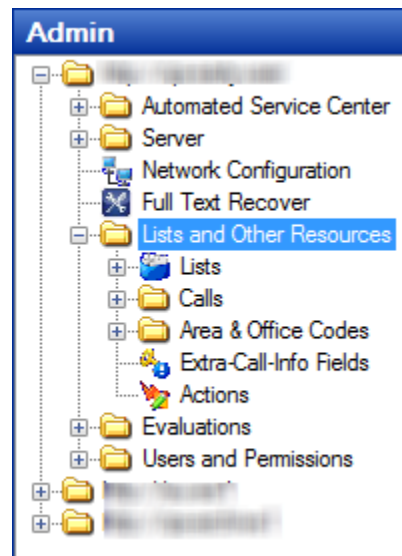
LISTS

There are eleven different types of lists available within OAISYS:

1. Account Code
2. ACD Group
3. Ad Campaign
4. Agent
5. ANI
6. DNIS/DID
7. Extension
8. Schedule
9. Extra-Call Info
10. VAT Port
11. Subject

System Lists are indicated by brackets appearing around the name.
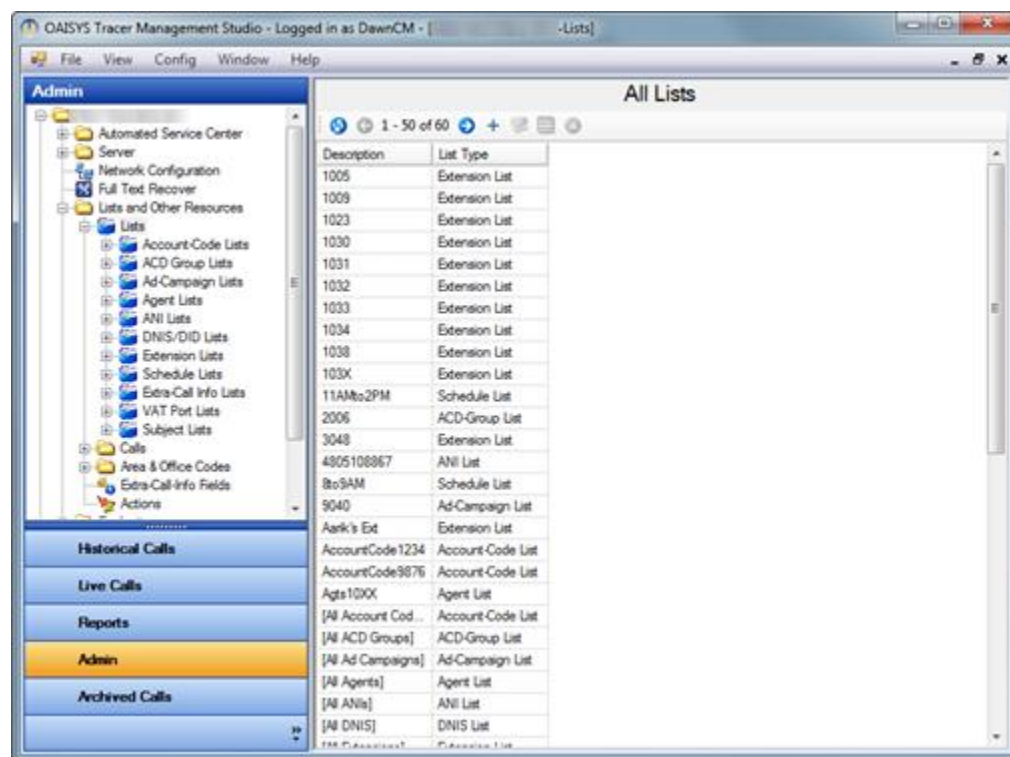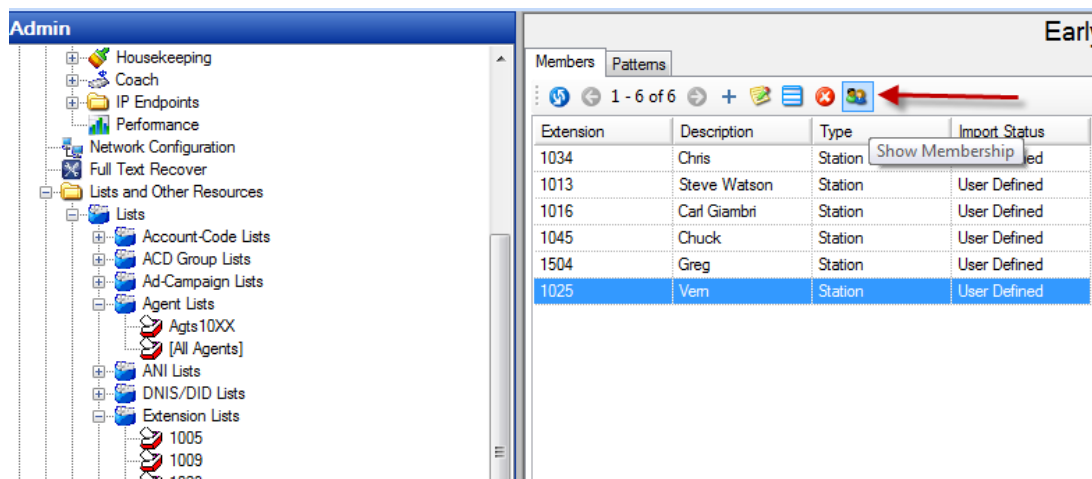
Example

[All Account Codes] represents a system list of all of the account codes in the system. System lists cannot be edited or deleted.

Show Membership
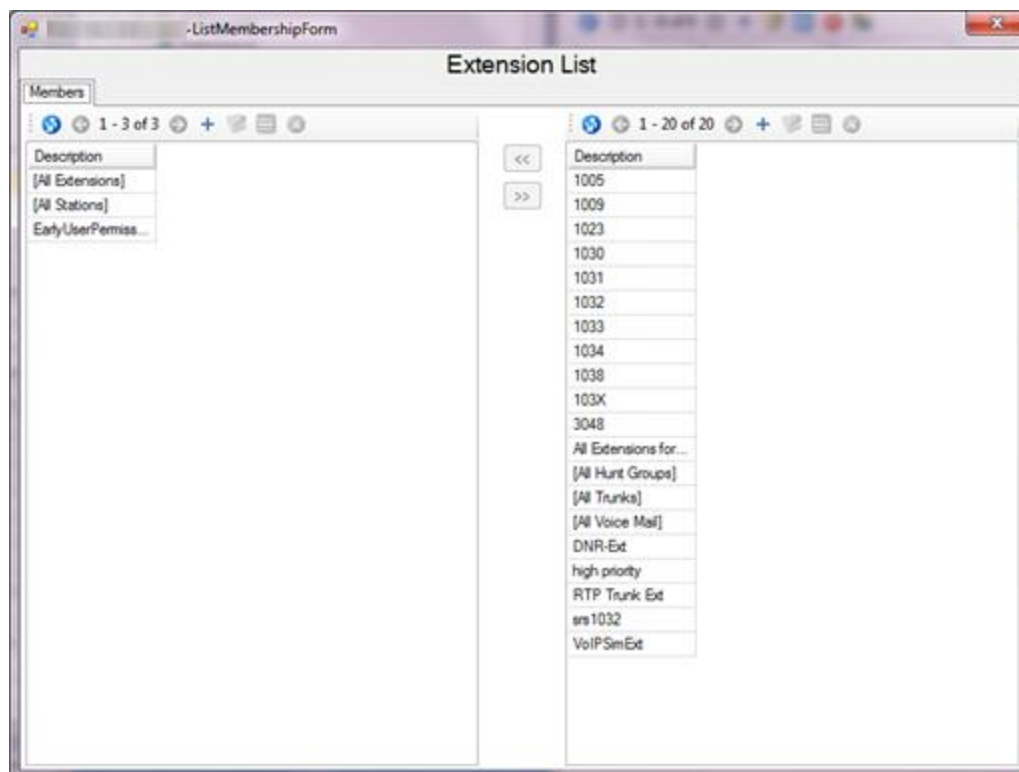
This function provides the ability to select a list member and view the other lists that member is associated with; this is especially helpful when setting up call filters and permissions.

Open the desired list → click Show Membership

Account Codes

Account Code Lists are used by OAISYS to allow users to view or listen to calls that have specific account codes associated with them. Account Code Lists can apply to recording rules.

Create a New Account Code List

From the tree view on the left → highlight the Account Code Lists → click Action → New
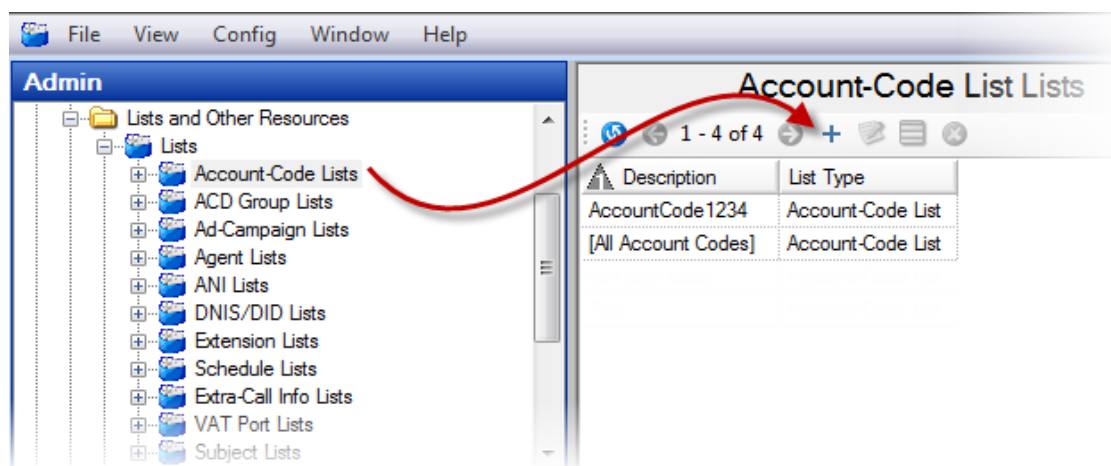
ACD Group

ACD Group Lists are used by OAISYS to allow users to view or listen to calls that have specific ACD Groups associated with them.

Ad Campaign

Ad Campaign Lists are used by OAISYS to allow users to view or listen to calls that have specific Ad Campaigns associated with them. It is necessary to set up an Ad Campaign List if evaluations and/or reports will be set up to use information in one or more Ad Campaigns.

Agent

Agent Lists are used by OAISYS to allow users to view or listen to calls that have specific agent IDs associated with them. This information can be used as a recording trigger.

ANI

ANI Lists are used by OAISYS to allow users to view or listen to calls that have specific ANIs associated with them. This information can be used as a recording trigger.

DNIS/DID

DNIS/DID Lists are used by OAISYS to allow users to view or listen to calls that have specific DNIS/DIDs associated with them. This information can be used as a recording trigger.

Extension

Extension Lists are used by OAISYS to allow users to view or listen to calls that have specific extensions associated with them. This information can be used as a recording trigger.

Schedule

Schedule Lists are used by OAISYS to allow users to view or listen to calls that have specific schedules associated with them.   This information can be used as a recording trigger.

Extra Call Info

Extra Call Info Lists are used by OAISYS to allow users to view or listen to calls that are associated with a piece of information (i.e. extra call info). Extra Call Info can be added real time or after the call is completed. This information can be used as a recording trigger.

VAT Port

VAT Port Lists are used by OAISYS to allow users to view or listen to calls that arrived at specific VAT Ports. This information can be used as a recording trigger.

Subject

Subject Lists are used by OAISYS to allow users to view or listen to calls that have a specific subject attached to them. A subject can be added real time or after the call has completed. This information can be used as a recording trigger.

CALLS

Expand the Calls view to display the Call Filters view.

Call Filters

Call Filters are used to make permission granting easier.

Example

To give your employees permission to view documents and playback calls to or from their extension, or to or from your extension. You can set up a call filter to do this.
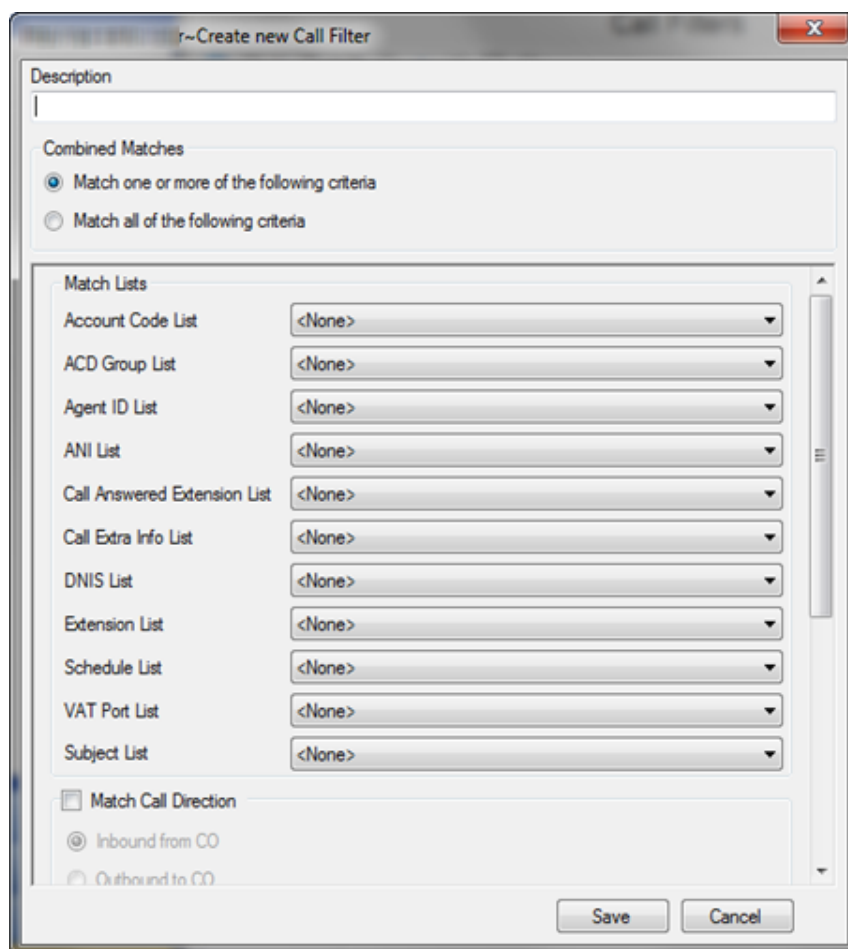
Call Filters are created automatically by checking the Call Filter option when creating lists. Call Filters can be created, edited, copied, and deleted from the tree view.

Create a New Call Filter

From the tree view on the left → highlight the Call Filters folder → click Action → New
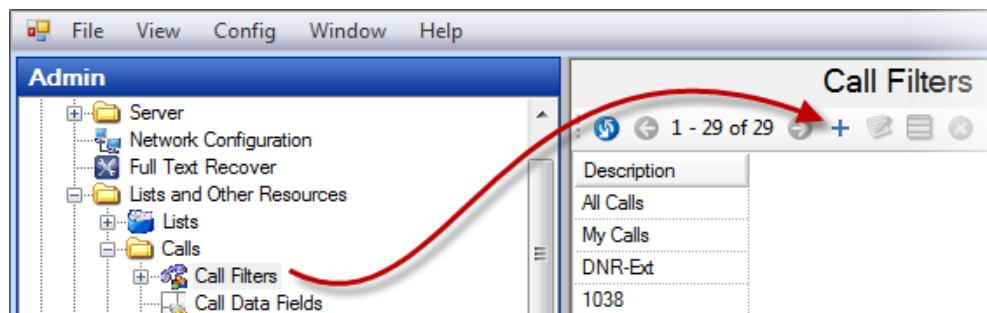
This will display the Create a New Call Filter pop-up. You can create call filters based on DNIS #s, Extensions, Account Codes, Agent IDs, ANI, ACD Groups, or Call Direction.

Description

Enter a name for the Call Filter.

Combined Matches

Select the appropriate radio button. If you'd like to match **only** the selected options then select the first radio button. If you'd like to call to match **all** of the options you select, use the bottom radio button.

Match DNIS #s

Create the Call Filter to match information about DNIS numbers.

Match Extensions

Create the Call Filter to match information about extensions.

Match Account Codes

Create the Call Filter to match information about account codes.

Match Agent IDs

Create the Call Filter to match information about Agent ID numbers.

Match ANI

Create the Call Filter to match information about ANI.

Match ACD Group

Create the Call Filter to match information about ACD Groups.

Match Call Direction

Create the Call Filter to match information about call direction.

Matching and Pattern Matching

Once an option to match is selected a drop-down appears allowing you to choose from an existing list. You can also match a pattern. (Pattern Matching is done on the "Patterns" tab when creating a list, not when creating a call filter.)

Example

If you want to match any account code that begins with 1, you will enter 1* in the account code pattern matching.

Wildcard	Regular Expression Equivalent	SQL Equivalent	Description
* or +	.*	%	Matches zero or more characters.
?	.	_	Matches a single character.
[charlist]	[charlist]	[charlist]	Matches a single character that is one of the characters in charlist.
[^charlist]	[^charlist]	[^charlist]	Matches a single character that is not one of the characters in the charlist.
#	\d	[0-9]	Matches a single numeric character.
-	None	None	Must be the first character. This wildcard finds values that do *not* match the rest of the pattern.
\	N/A	N/A	This is the escape character.
\\	N/A	N/A	Translates into a single '\' character.

Copy a Call Filter

From the tree view on the left → highlight the Call Filters folder → select the call filter you want to copy → click Action → Copy

Edit a Call Filter

From the tree view on the left → highlight the Call Filters folder → select the call filter you want to edit → click Action → Edit

Delete a Call Filter

From the tree view on the left → highlight the Call Filters folder → highlight the call filter you want to delete → click Action → Delete

CALL DATA FIELDS

The Call Data Fields in OAISYS can be used in many ways.

Example

A Call Data Field can be used as a drop down list. The drop down list can appear in the Historical Calls View in the OAISYS Management Studio and/or under a configurable button in the OAISYS Desktop Client.

Create a New Call Data Field

From the OAISYS Administrator → select Calls → Call Data Fields → click on the Plus sign on the tool bar
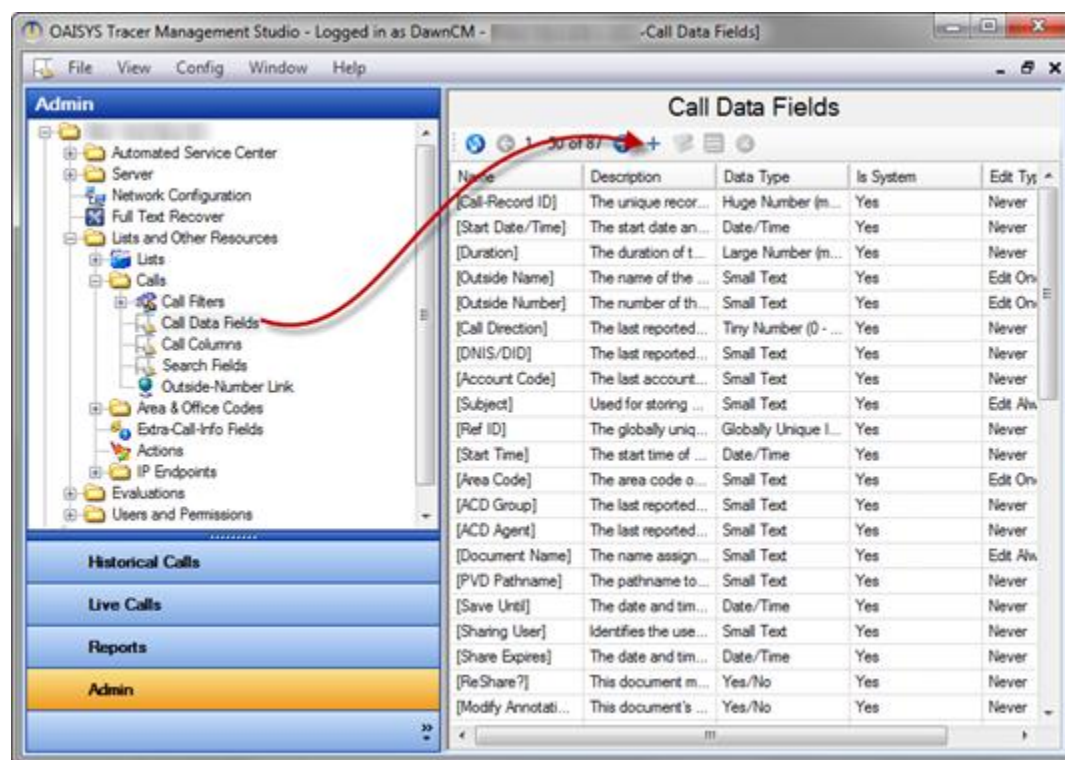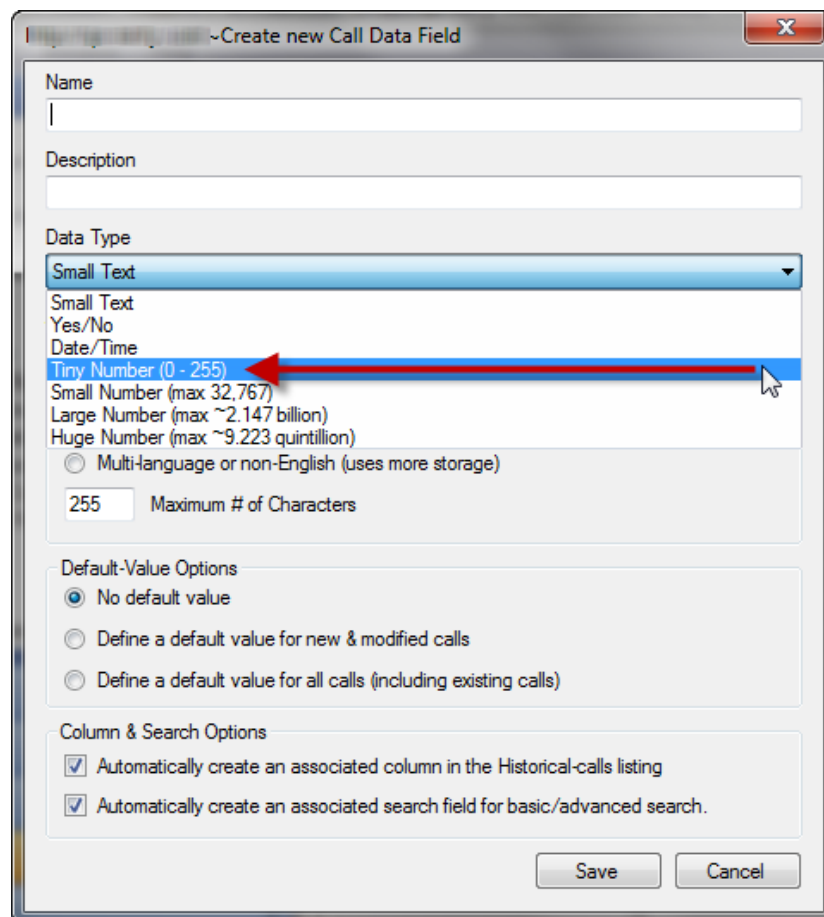
NOTE: Please note Call Data Fields with brackets [ ] around them are system Call Data Fields and cannot be edited or deleted.

The following window will appear to add a Call Data Field.

Enter a Name and Description for the Call Data Field → select the Data Type

NOTE: Select *Tiny Number* as shown below if you want to create a drop down list.

DEFAULT VALUE OPTIONS

Select a radio button to indicate a default value.

The options are:

- Never define a default value
- Define a value for only new and modified calls
- Define a value for all calls; including all historical/existing calls.

COLUMN & SEARCH OPTIONS

Enter check boxes to automatically create a column with your newly created

Call Data Field Name in your Historical Calls View and/or to create a search field with this Call Data Field Name in basic and advanced searches.

DATA TYPE

Select the data type of Tiny, Small, Large and Huge Number when you want text to appear in drop down lists.

For predefined data to appear in the user's interface, select Define an enumeration to represent/edit the data. Once this option is selected the Enumeration options appear (see next page).

A numeric value ranging from 0-255 can be used with Tiny Number.

Enter the text you want to appear in the dropdown in the text field → enter a value for your text

NOTE: This value must be a number between 0 and 255. The values

entered do not need to be in numeric order nor in sequential order. In other words, you can enter the values of 2, 7, and 5 if you wish.

Changing the numeric value does not change the order the text will be displayed in the User Interface. The text will appear in the order it was entered.
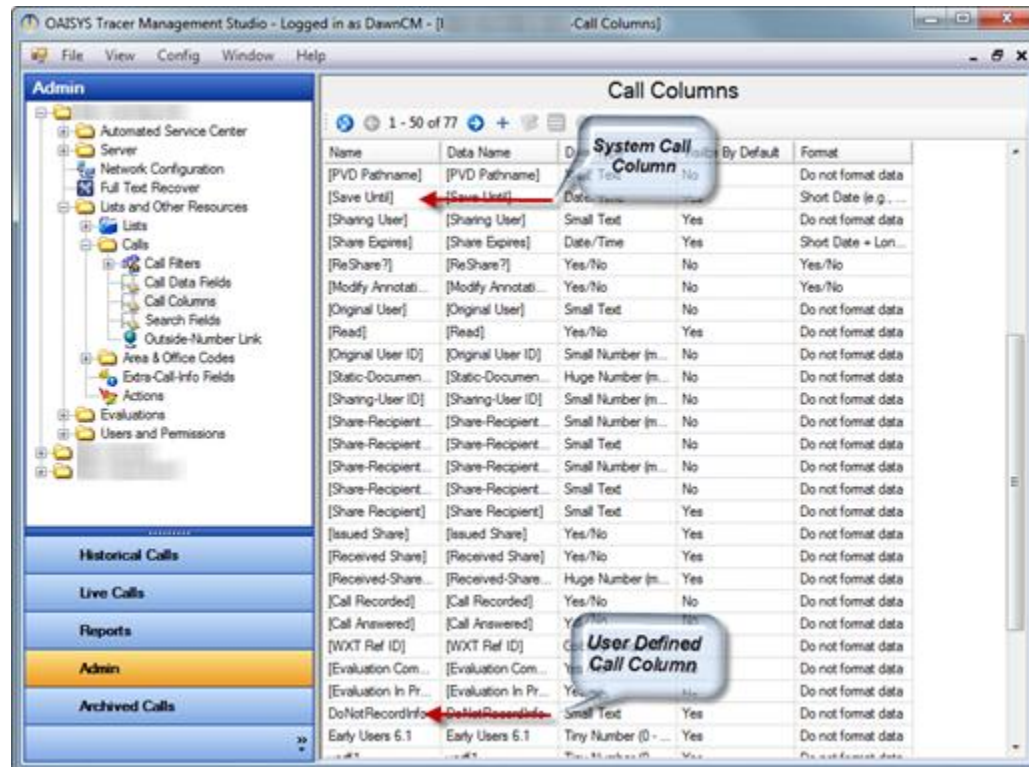
Below is an example of how the Call Data Field configured on the previous page will appear in the OAISYS Management Studio.
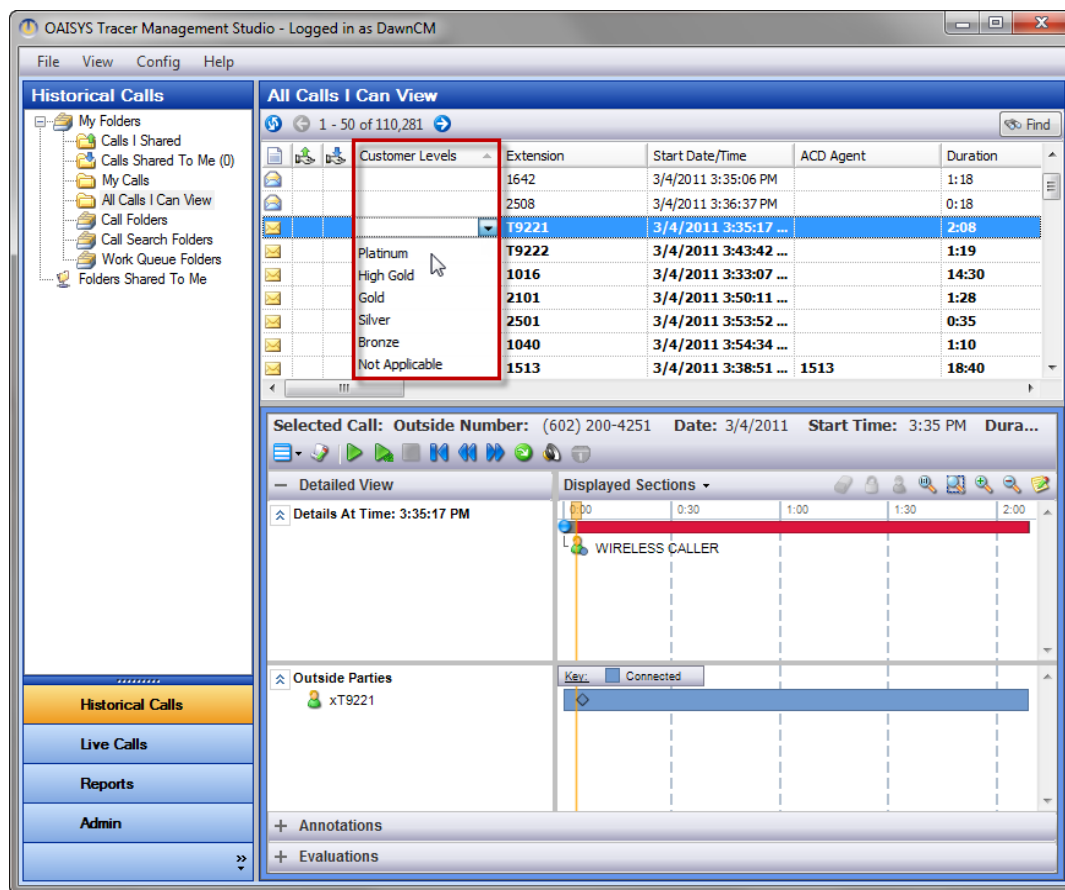
> ➢ Entries selected from the drop down option through a Call Data Field cannot be deleted.
> ➢ The order of the text in the display in Historical Calls or the Desktop Client cannot be changed.
> ➢ The text for an item in an enumeration cannot be changed.
> ➢ You can add more names and values to an enumerated Call Data Field.

Call Columns

This branch displays the call columns that are available for display in the Historical Calls tab. Call columns with brackets around them are System call columns, and cannot be edited or deleted. Call columns without brackets are user defined call columns, and can be automatically created when creating new call data fields.

Create a new Call Column

Click the Plus button [+] to display the following:

COLUMN NAME

Enter a name for the call column.

CALL DATA FIELD

Select a call data field from the drop down list.

DEFAULT VISIBILITY

Choose to show or hide the column in the Historical Calls call grid. If the column is hidden, by default the users may still display the call column by going to their Field Chooser.

DISPLAY COLUMN DATA USING THE FOLLOWING FORMAT
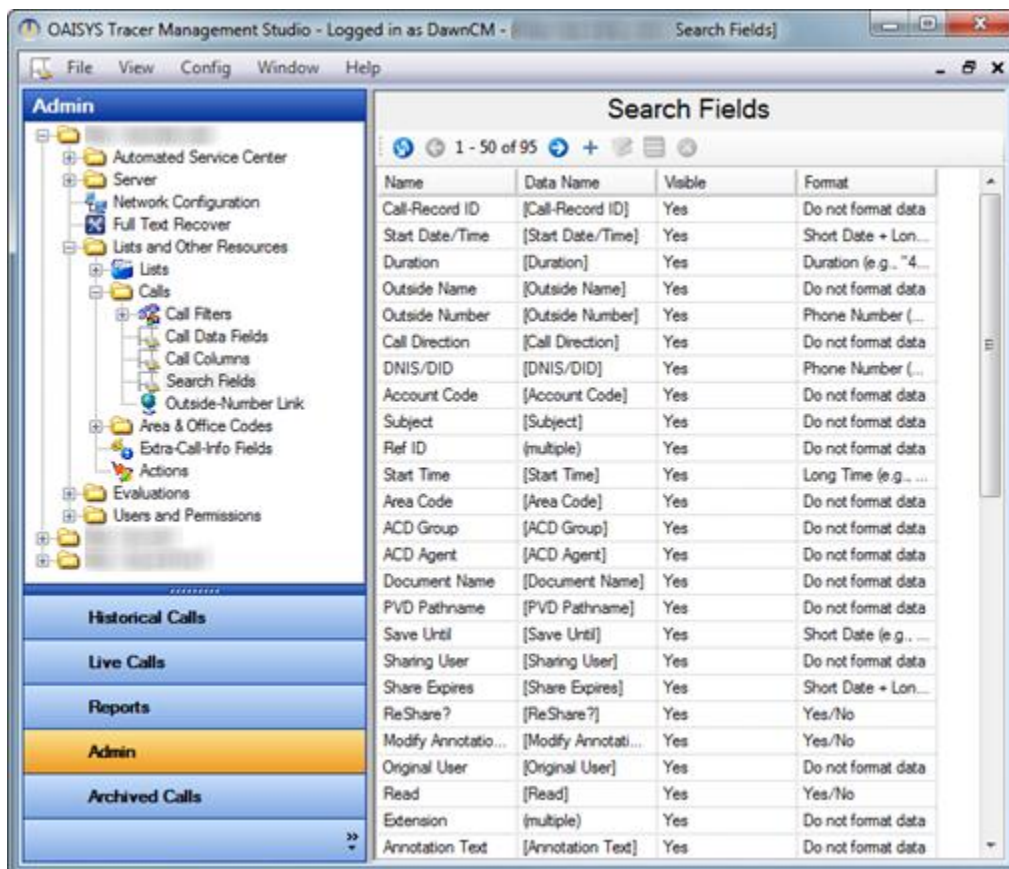
Select an option from the drop down list:

- Do Not Format Data
- Whole Number (i.e. 1,254)
- Fractional Number (12.35)
- Yes/No
- Duration (i.e. 12:34:56)

Click **Save** to save your changes.

Search Fields

This branch displays the Search Fields that are available for searching. Search Fields with brackets around them are System Search Fields, and cannot be edited or deleted. Search Fields without brackets are user defined Search Fields, and can be automatically created when creating new call data fields.

Create a new Search Field

Click the Plus button ![+] to display the following:
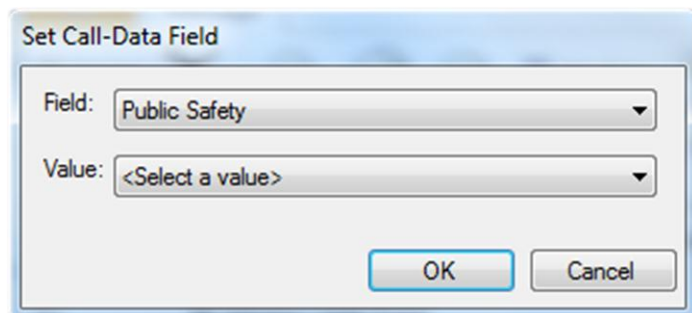
Enter a unique name for the Search Field → select a Call Data Field from the drop down list → select a format for the Search Field → click **Save** to save changes

The new search field will be available anywhere advanced searches can be performed.

Extra Call Info Fields

Extra Call Info Fields are used by the OAISYS Recording Client when attaching information to a call in real time. The Extra Call Info will display in the Call Visualization panel of the OAISYS client and will be searchable information.

Outside-Number Link

This feature allows users to lookup a phone number through a pre-configured URL.
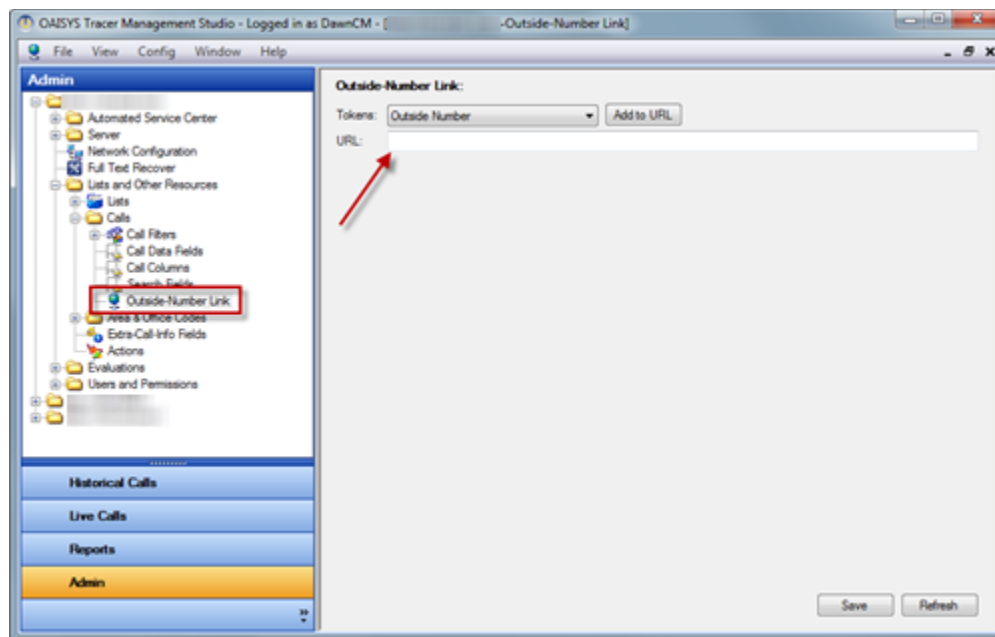
NOTE: OAISYS does not offer or support this service; it is available through a number of companies that provide data quality and phone number/address management solutions.

Actions

Actions must be created before they can be used in After Call Actions.
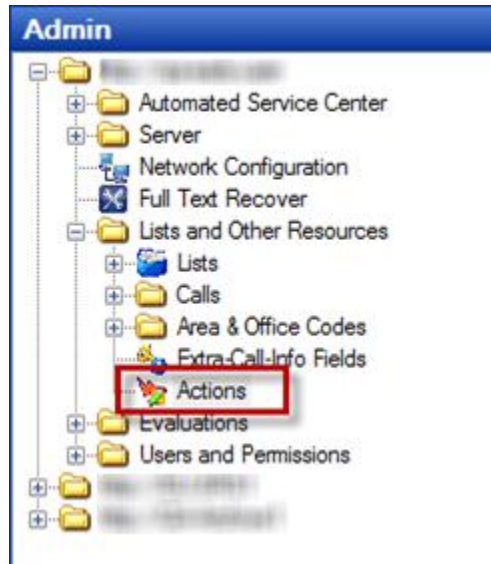
Actions

The user can create, view, change or delete an action. For additional information on accomplishing this, please see After Call Actions.

EVALUATIONS

Evaluations can be performed on Live Calls or Historical Calls. Evaluations are set up in the administrator application.
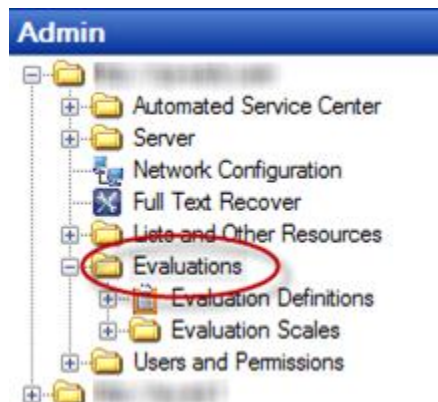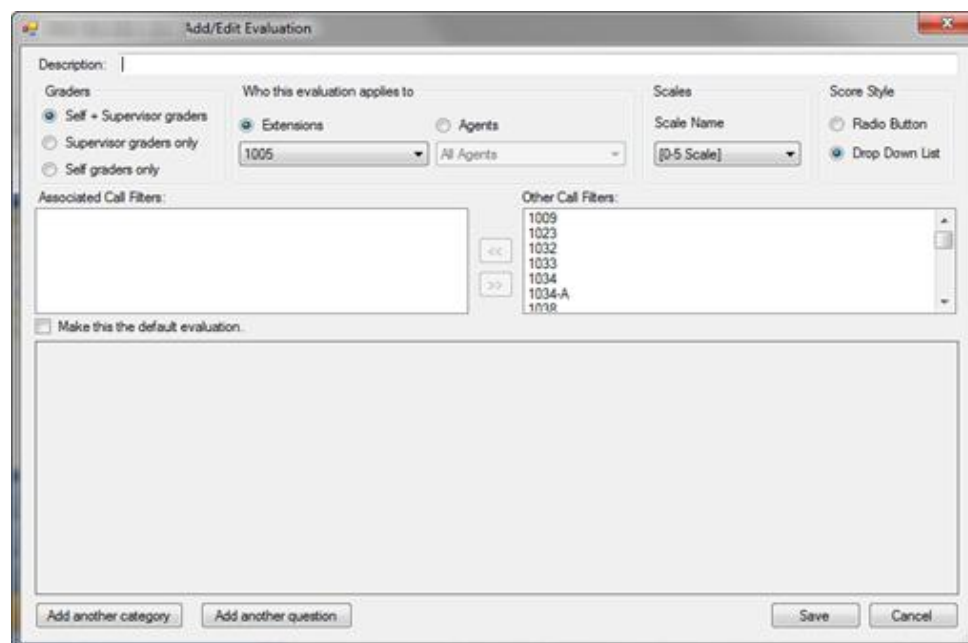
EVALUATION DEFINITIONS

The ability to create evaluation definitions is a permission setting.

To Create a New Evaluation Definition

Click on the Plus button to display the following configuration screen

NOTE: When completing an evaluation, if the score for a particular

queston is set to N/A, that score and the question weight are simply ignored when calculating the weighted average.

DESCRIPTION

Enter a unique description for the evaluation. This description serves as the name of the evaluation and it will appear in Historical Calls, Live Calls, and Work Queues.

GRADERS

Select the radio button to indicate who will perform this evaluation; Supervisors, Self Graders, or both Supervisor and Self Graders.

WHO THIS EVALUATION APPLIES TO

Select either the Extension List that this evaluation will be applied to or select the Agent List that this evaluation will be applied to. You may not choose both.

SCALES

Select the scale to be used for this evaluation from the available scales in the drop down list.

NOTE: The scales must first be set up under [Evaluation Scales](#).

ASSOCIATED CALL FILTERS

Move the call filters that the evaluation applies to over using the double arrows.

Example

To set up an evaluation for your Agent List called "Sales" to apply to inbound calls over five minutes in duration, set up a call filter for inbound calls over five minutes, then apply the call fitler here.

MAKE THIS THE DEFAULT EVALUATION

Check this box to indicate the evaluation is to be used as the default evaluation. (The default evaluation will be used when more than one evaluation meets a call filter.)

ADD ANOTHER CATEGORY

Click this button to add a new category for the evaluation. A category will consist of one ore more questions. Once clicked you must enter at least one question.

ADD ANOTHER QUESTION

Click this button to add one ore more questions to the evaluation. If used, this option will create an evaluation without categories or sections.

Click **Save** to save your evaluation.

EVALUATION SCALES

Define custom scales for your evaluations.

Click the Plus button [+] to create a new evaluation scale
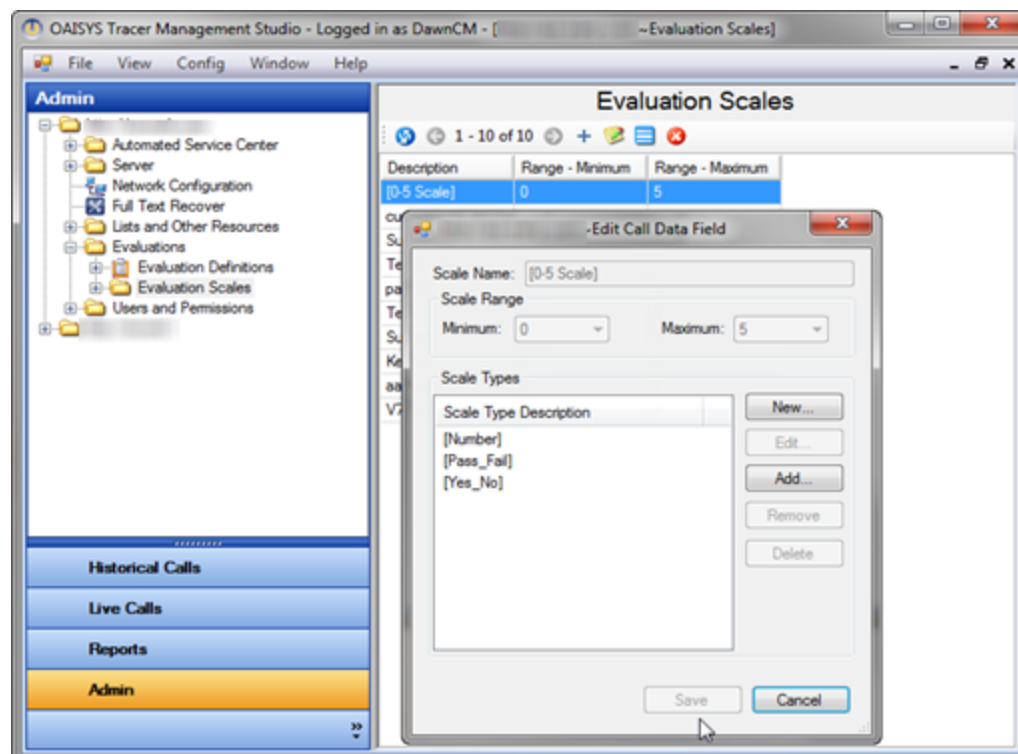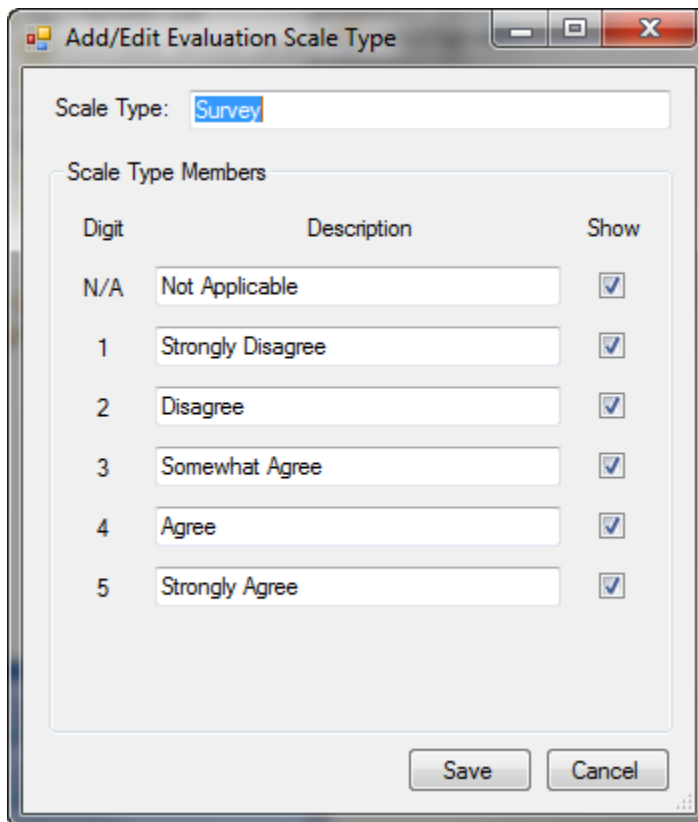
Enter a unique name for the evaluation scale.

Scale Range

Enter a minimum and maximum for the scale. The minimum is 0 and the maximum is 10.

Click **New** to enter descriptions for the range. Enter a checkmark to indicate you'd like the description to appear in the Evaluation. If a checkmark is not entered then the number will appear in the evaluation but the description will not.

Click **Save** to save the changes.

Use the Edit, Copy, and Delete buttons to manage the Evaluation Scales.

USERS AND PERMISSIONS

The OAISYS system records all calls. The permissions set up within the Administrative Client determine who can listen to calls or parts of calls.

The Users and Permissions section of the OAISYS Administrator consists of three sub-sections:

1. Users
2. User Groups
3. Applications

- The Users section is where the administrative user sets up and administers users.
- The User Groups section is for administering groups of OAISYS users or Guest users.

USERS

A user is someone who has permissions to access one of the OAISYS Applications. A user can also be a member of a user group in which case they may inherit the permissions assigned to the user group.

User Table

The user table lists all users with access to the OAISYS Applications and displays:

- Username
- Description
- Agent ID
- Extension

EXTENSION AND AGENT ID COLUMNS

This function has been added to the User table in the Administrator and will be most helpful for sites with a large number of users and extensions to quickly identify which extension or Agent ID is associated with a

particular user.
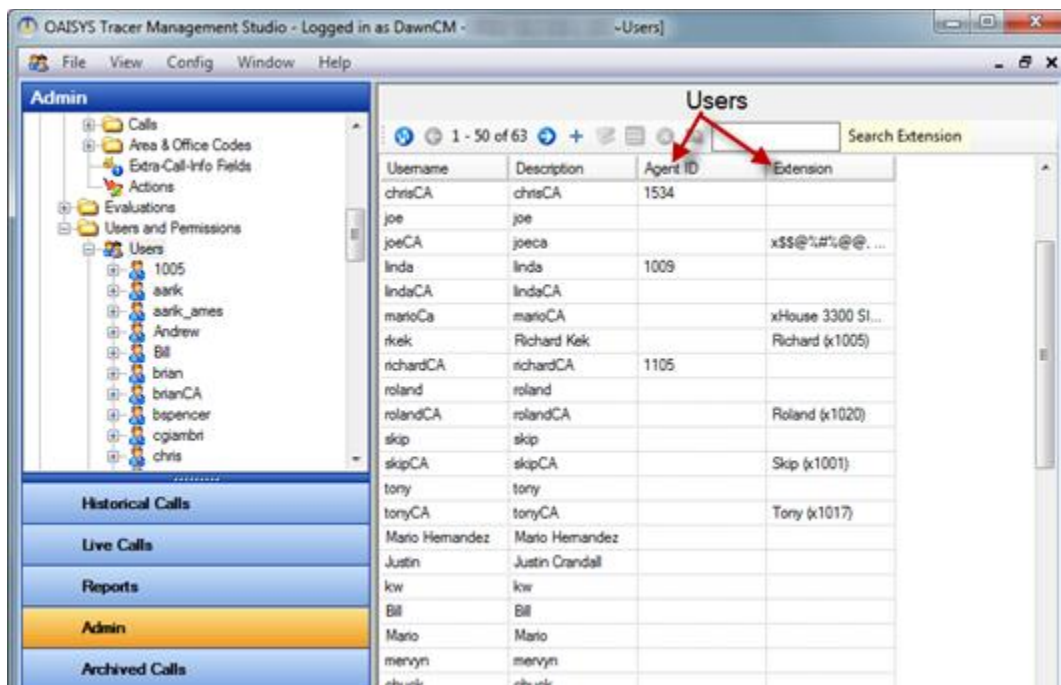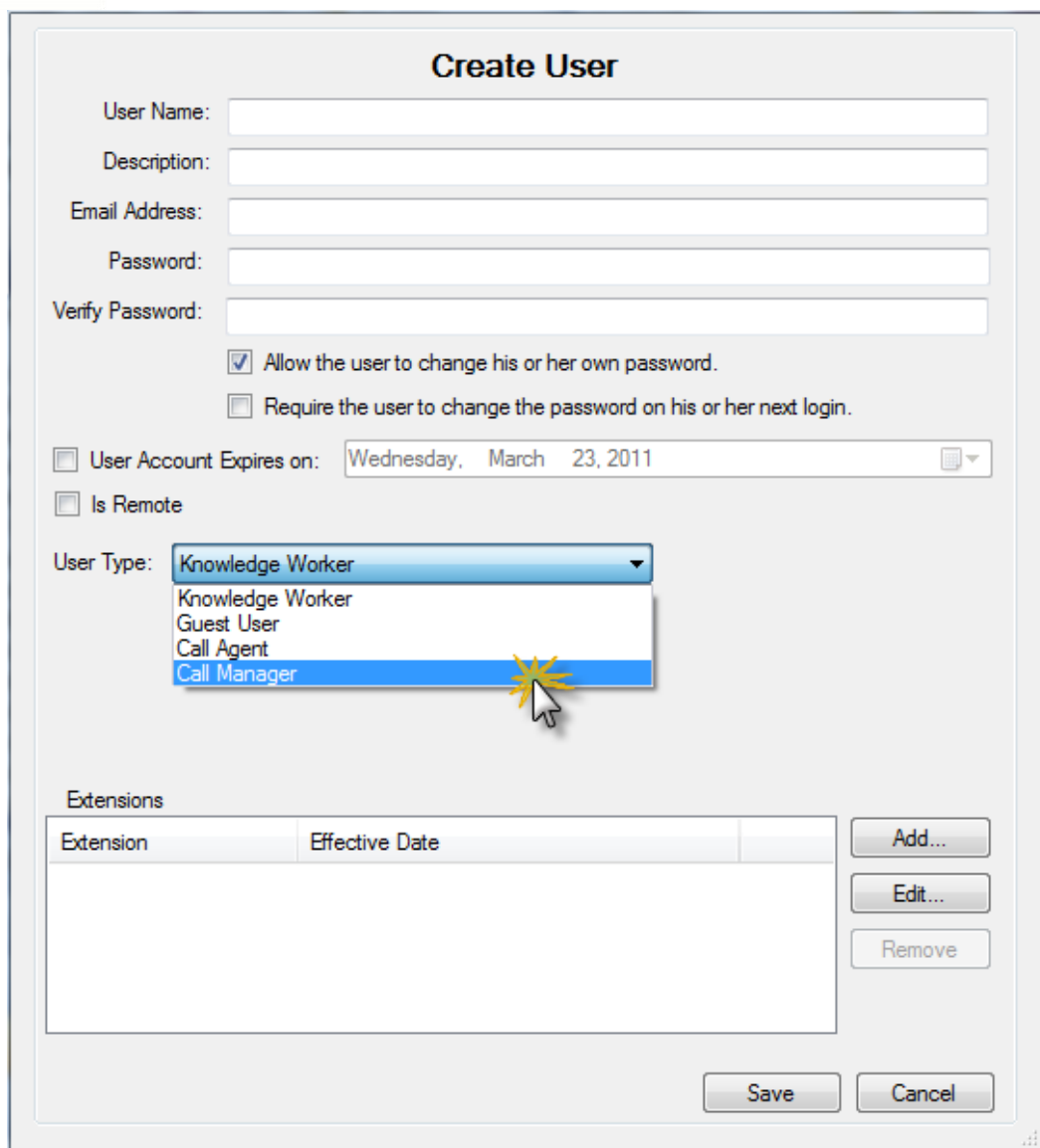
Create a New User

Click on the Plus button to create a new user
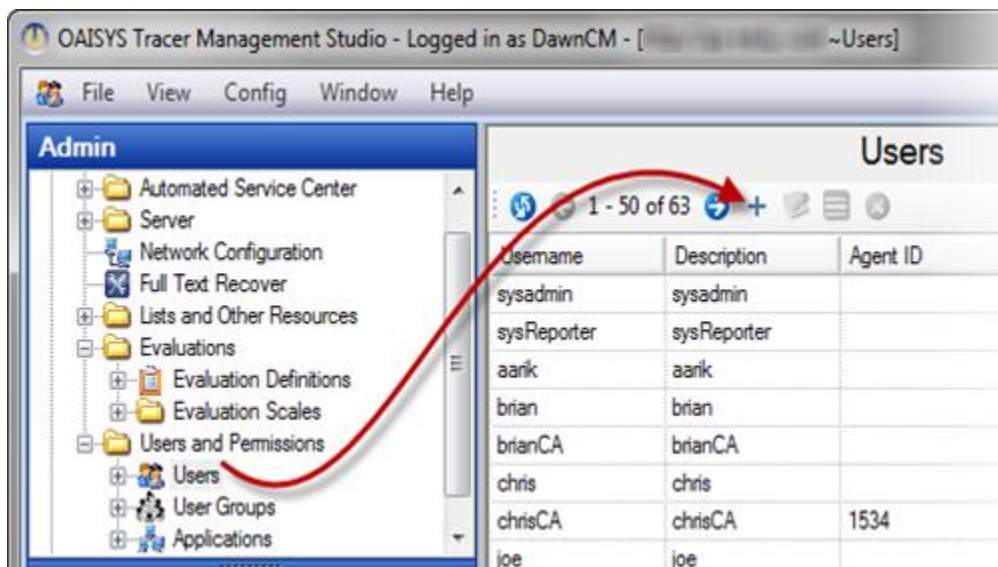
This will display a "Create User" pop-up (see next page).

User Name

Enter a unique user name for the application user.

Description

Enter a description for the application user.

Email Address

Enter the user's email address.

Password

Enter a unique password for the application user.

Verify Password

Reenter the password.

User Account Expires On

Enter a checkmark if you want the user account to expire. Indicate the date the account should expire.

Is Remote

Enter a checkmark for external users.

Extensions

Select one or more extensions for the user. The extension field is not required. The extension(s) will be used in the My Calls folder. Select from the available extensions.

NOTE: The extensions must first be created in your extension list.

Application Permissions and User Groups are subfolders accessible from the User view.

From the tree view, you can highlight the Users folder. Once expanded, you will see all current users. When you expand the individual user in the tree you will see the Applications Permissions folder and the User Groups folder. This allows you to see the user's application permissions and group memberships.
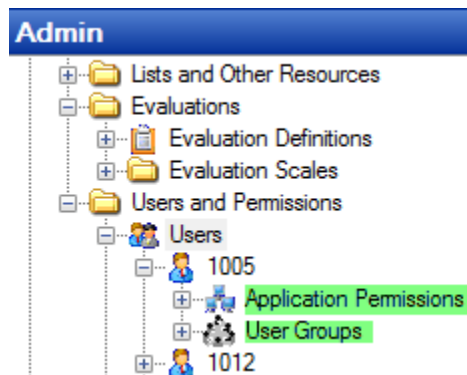
Copy, Edit, and Delete Users

From the Users folder → select the User you want to copy, edit or delete → make the appropriate changes → click **Save**

USER GROUPS

User Groups let you specify a group of users that can perform specific actions within the OAISYS applications. By creating User Groups and assigning Applications Permissions to the User Group the users of the group automatically inherit the permissions of that group.

Create a new user group

From the User Group folder → click the Plus button [+] → enter the Description → click **Save**
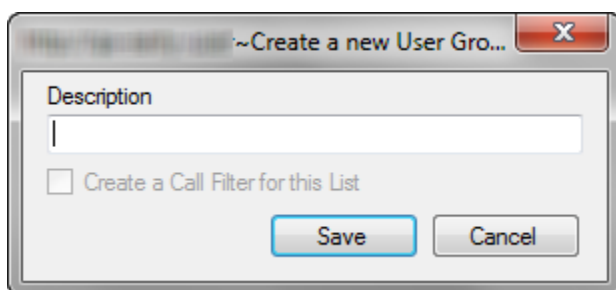
Highlight the new User Group on the left pane → move members to and from the group using the double arrows

APPLICATIONS

There are five OAISYS Applications in which the permissions can be set from the OAISYS Administrative Client, and can be set at the individual user or user group level.
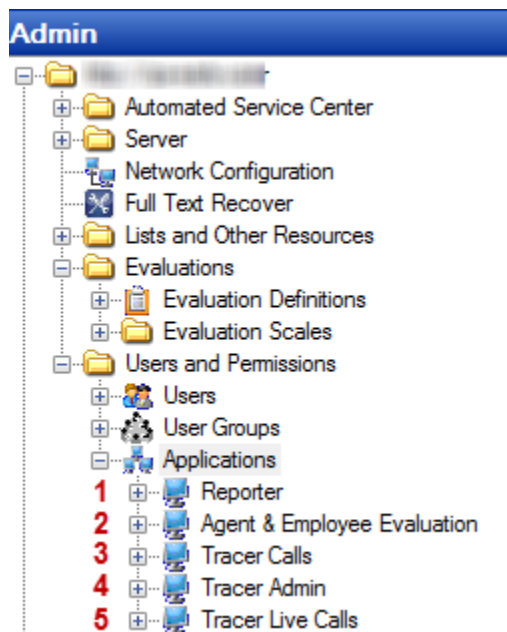
NOTE: Live Calls, Reporter, and Employee Evaluations are available with the OAISYS Tracer recording solution.

Each can be expanded to display the Users with Permissions to the application and User Groups with Permissions to the application.
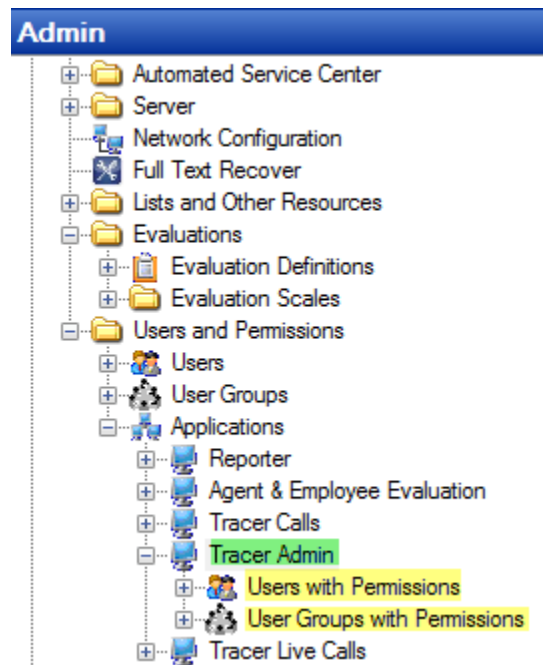
Users with Permissions

Setup or configure individual user permissions.

User Groups with Permissions

Setup or configure user group permissions. All users in the user group will inherit the permissions of the user group at a minimum. The individual user's permission can be edited to allow or deny further permissions.

ADMIN PERMISSIONS

This screen is used to set up an administrator user's permission to grant permissions to users/user groups and to administer devices.

Device Administration

This is used to enable permissions for individual users or user groups with Admin permissions to create new users or user groups, view and modify

server settings, and view and modify lists and other resources.

To allow or deny an Admin user rights

Go to Applications → Tracer Admin → Users with Permissions (or User Groups) → select the user or user group → enter a checkmark in the appropriate allow/deny box for each permission
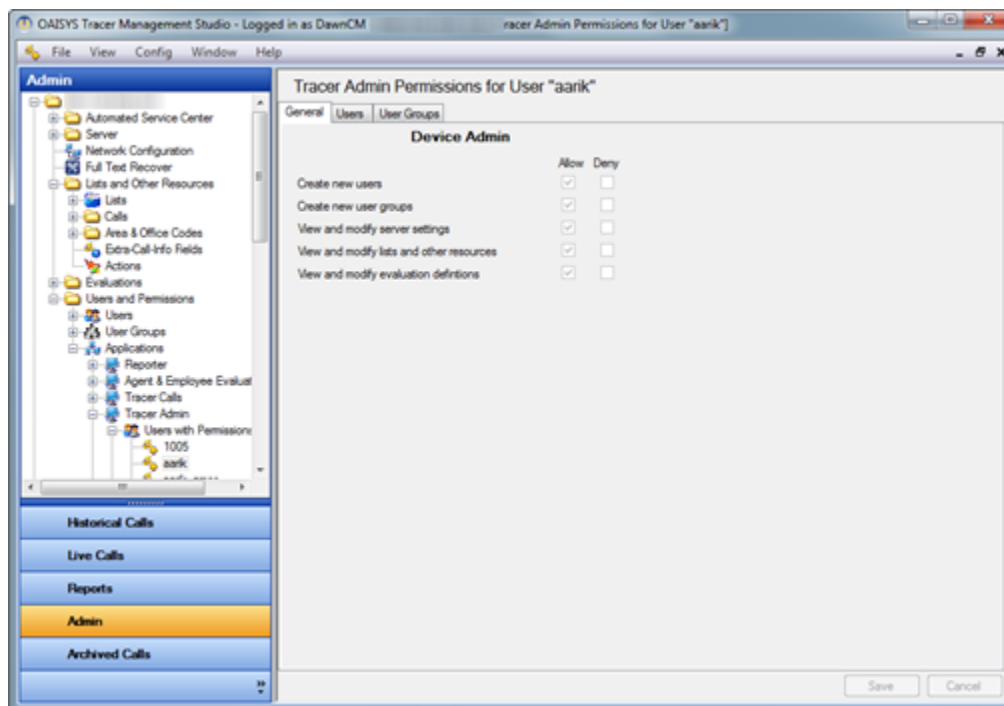
General Administration

A user or user group with Admin permissions may be granted permission to View, Edit, or Delete users or user groups.

To allow or deny an Admin user rights

Go to Applications → Admin → Users (or User Groups) → select the user or user group → move the User Groups the admin user has permission to administer by using the double arrows → enter a checkmark in the appropriate allow/deny box to indicate if the Admin user is allowed or denied permission to View, Edit, or Delete the selected user groups

Admin-Client Administration

NOTE: This section refers to the administration of the OAISYS Admin application.

Permissions can be set for the Admin user to view or change (edit) the permissions for users/user groups. Enter checkmarks indicating the applicable permissions for the Admin user.

Client Administration

NOTE: This section refers to the administration of the OAISYS Client application.

Permissions can be set for the Admin user to view or change (edit) the permissions for users/user groups. Enter checkmarks indicating the applicable permissions for the Admin user.

REPORTER PERMISSIONS (TRACER)

This section is used to set up permissions to the Reporter application within Tracer. Permissions can be set up based on individual users or user groups. The components of each tab are discussed in further detail below.
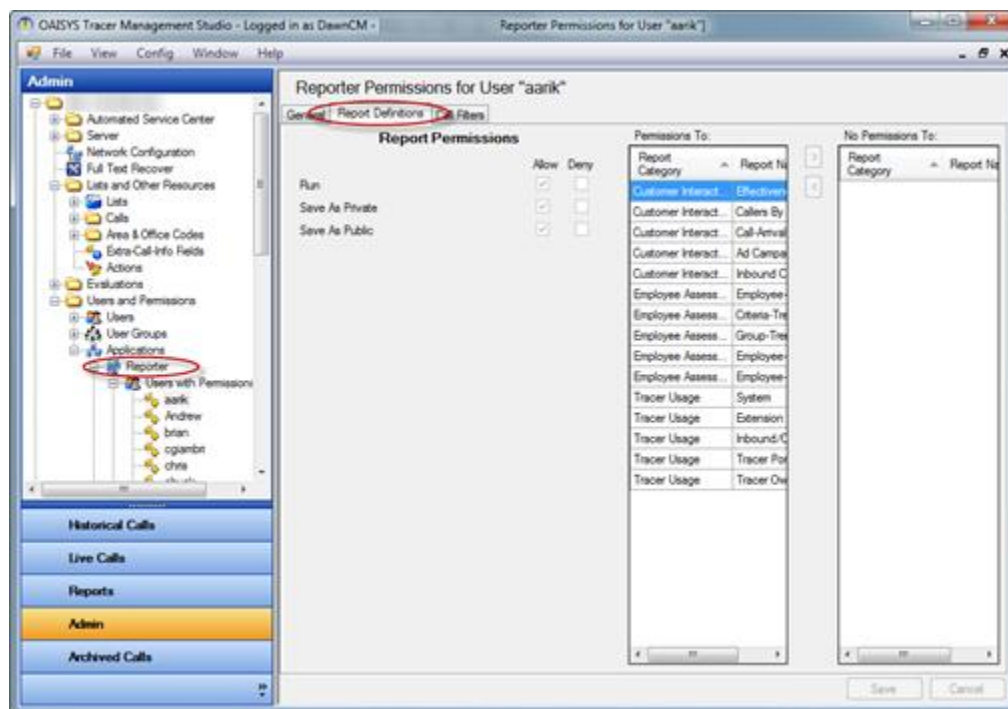
NOTE: Reports do not apply to Archived calls.

GENERAL TAB

Under the General Tab the Admin can allow the users/user groups to report on My Calls; i.e., calls associated with the user's extension(s).

REPORT DEFINITION TAB

Under the Report Definition tab the Admin can select the reports that the users/user groups have permissions enabled. They can allow the users/user groups to Run the reports, Save the reports as Private (i.e., only the user who created the report can view and run the report), or save the reports as Public (i.e., any user with permission to the reports can run them).

CALL FILTERS TAB

Under the Call Filters tab the Admin can enable permissions to specific call filters.

NOTE: Call Filters must be previously set up under the Lists and Other Resources.

AGENT & EMPLOYEE EVALUATION

This section is used to set up permissions to the OAISYS Evaluations based on individual users or user groups.

GENERAL TAB

The options under the General tab are Show Evaluations Grid, and Email Evaluations.

Show Evaluations Grid

By allowing this option, the user/user groups will see the evaluations panel and grid in the Management Studio application. All evaluations with permissions enabled will be displayed here.

Email evaluations

This option will allow the users/user groups the ability to email an evaluation once complete to one or more recipients.

EVALUATIONS TAB

This allows the Admin the ability to enable permissions for specific evaluations to users/user groups. All evaluations that were previously set up under Lists and Other Resources will be available here.
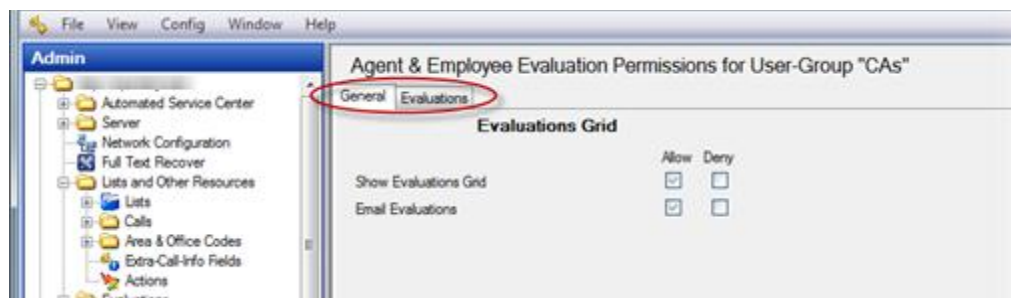
OAISYS CALLS APPLICATION PERMISSIONS

This section is used to setup or configure users/user group permissions to the Management Studio Client Application for folders, documents (call recordings), and annotations.

NOTE: Document and Annotation permissions are based on Call Filters. In order to assign permissions you must first set up your Call Filters.

Folder Permissions

This is used to enable permissions for users/user groups to add new folders, delete folders, or to change the name or search criteria of their folders in their OAISYS Client Application. These folders can be either static folders or search folders.
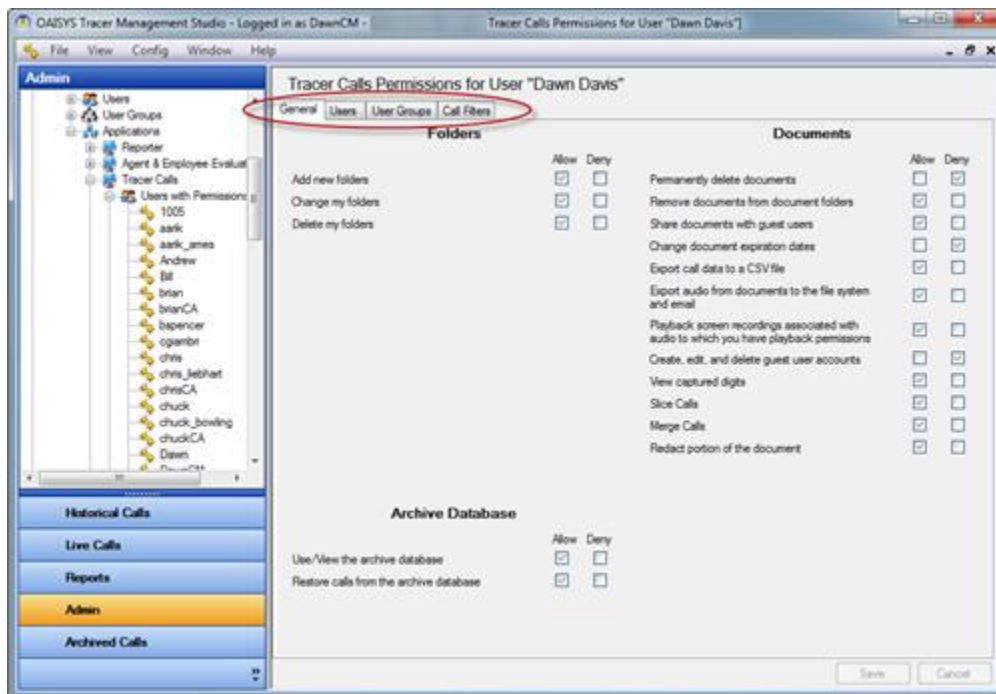
NOTE: Users cannot delete system folders.

Document Permissions

PERMANENTLY DELETE DOCUMENTS

This is used to enable permissions for users/user groups to permanently delete voice documents.

⚠️ **NOTE:** Once deleted, the voice document cannot be retrieved.

REMOVE DOCUMENTS FROM DOCUMENT FOLDERS

This is used to enable permissions for users/user groups to remove documents from their document folders. This does not delete the document; it only removes the document from the folder. The user can no longer see the document in the folder, but it may appear in other folders.

SHARE DOCUMENTS WITH GUEST USERS

This is used to enable permissions for users/user groups to share documents with guest users. Guest users are external to the OAISYS System, requiring adding an email address. Sharing a document with a guest user sends an email with a link back to the document on the Talkument server.

NOTE: The guest user will be emailed a link to install the application the first time they are shared a document.

CHANGE DOCUMENT EXPIRATION DATES

Documents are kept until a specified date. Once a document reaches this date, it follows normal housekeeping rules for staging and purging. Enabling permissions provides users/user groups the ability to change the expiration date of a document so the user can keep a document longer.

EXPORT CALL DATA TO A CSV FILE

Call data appearing in the call grid can be exported to a CSV file based on enabled permissions.

EXPORT AUDIO FROM DOCUMENTS TO THE FILE SYSTEM AND EMAIL

This is used to enable permissions for users/user groups to select one or more recordings from the call grid and export the audio from the call to another format. The user or user group can the email the audio to one or more email recipients.

PLAYBACK SCREEN RECORDINGS

This is used to enable permissions for users/user groups to play the video or screen recordings associated with the calls they have permission to access. OAISYS Screen Recording is an add-on option for the Tracer recording solution.

For more information please refer to the online [OAISYS Screen Recording Manual](#).

CREATE, EDIT, AND DELETE GUEST USER ACCOUNTS

This is used to enable permissions for users/user groups to create, edit, or delete guest user accounts associated with the calls they have permissions to access.

VIEW CAPTURED DIGITS

This permission feature allows users to view the DTMF digits that were captured on a call they have permissions to access. This is used for Analog, Digital (T1/PRI) Trunk Taps only.

SLICE CALLS

Users and user groups with this feature enabled can slice segments from the initial call recording to create two or more legitimate call documents.

MERGE CALLS

This permission feature provides users/user groups the ability to create a single PVD recording to be created from multiple PVD segments. This applies to call recordings as well as radio recording segments.

REDACT PORTION OF THE DOCUMENT

Also called "Blurring" or "Scrubbing"; this feature enables users/user groups to highlight a segment of the audio and play silence over it.

ARCHIVE DATABASE

These permission features allow users/user groups to view, playback and remove online archive files. The archive database provides long-term archiving with instant access.

Call Filters Tab

DOCUMENT VIEW PERMISSIONS

Document view permissions are based on call filters.

Select the call filters and move them with the double arrows to enable permissions to view documents that meet the call filter criteria in the document list view and in the visualization view. Permissions can also be enabled for audio playback with the associated document.

ANNOTATION PERMISSIONS

Annotation permissions are based on call filters and provide users/user groups the ability to view annotations, add and edit their own annotations, and delete their own annotations.

User and User Groups Tabs

SHARE DOCUMENTS

This is used to enable permissions for users/user groups to share documents with specific users/user groups.

OAISYS Live Calls Application Permissions

This section enables permissions for users/user groups within the Live Calls application in the OAISYS Management Studio. Users/user groups can listen to calls live as they take place if permissions are enabled.

NOTE: All permissions are based on Call Filters; Call Filters must be established prior to assigning permissions.

GENERAL

This is used to enable tracking of users/user groups while monitoring a live call. If enabled, the listening user's login name will appear as extra information in the live call.

ALLOW EMAIL RECORDINGS

This is used to enable permissions for users/user groups to email a secure link to the recording from their Live Calls interface.

To email recordings

Select a call in the call grid → right-click → select email recording

ALLOW USERS TO EXIT OAISYS DESKTOP CLIENT

This is used to enable permissions for users/user groups to close and exit their Desktop Client application which is used to enter information on live calls and for coaching.

For more information please refer to the Desktop Client User Guide.

ALLOW OAISYS DESKTOP CLIENT TO SHOW RECORDING STATUS

Selecting the Allow box displays the recording status on the Desktop Client application. The user of the Desktop Client application will be aware when their calls are being recorded. If the box is checked to Deny, this will allow the Desktop Client application to be used for all purposes; however, the recording status will not appear in the client application.

USERS AND USER GROUPS

Allow or deny users/user groups the ability to create or administer custom buttons to users. These custom buttons are used to enter information to live calls, add annotations to live call, push URLs, and annotate live calls.

For more information on custom buttons please refer to the OAISYS Desktop Client User Guide.

CALL FILTERS

Permissions to view and listen live to calls, and to stop and start recording of live calls from the Live Calls Interface are set from this screen. The Live Calls interface will differ depending on the user type.

- The Live Calls interface for Call Agents is the OAISYS Desktop application.
- The Live Calls interface for Call Managers is the OAISYS Management Studio – Live Calls tab.
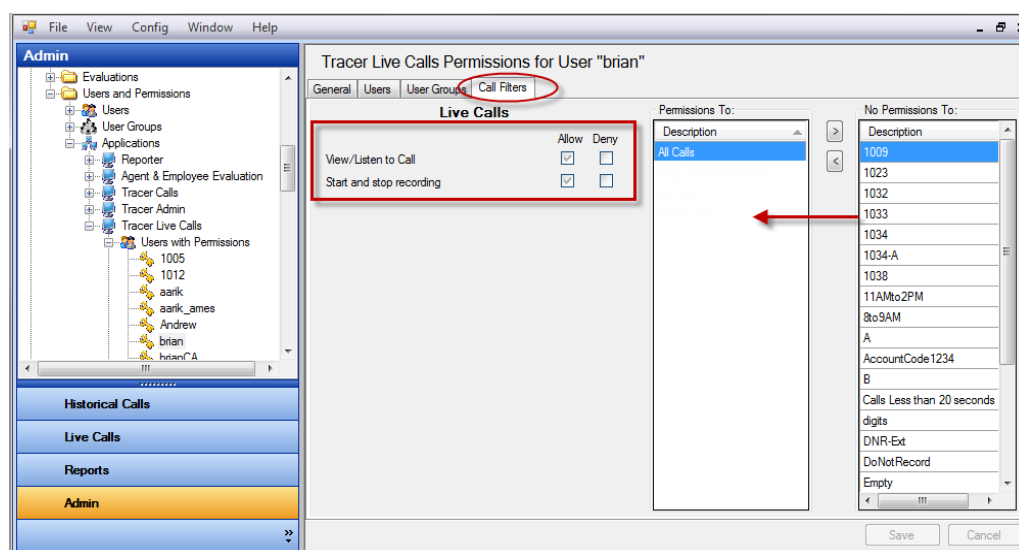
NOTE: Users and User Groups that appear with brackets around them are system users or system user groups, their permissions cannot be edited.

User Types Defined

This section provides a description of the types of users supported in the OAISYS solution system.

Knowledge Worker (unlimited with all OAISYS recording solutions)

The Knowledge worker has permission to his/her own calls and permissions to any other calls the Admin gives them permissions to access. The Knowledge Worker can run the OAISYS Desktop Client application with customizable buttons. (Coaching is NOT available to the Knowledge Worker.)

Call Agent (Tracer only)

This user type is functionally the same as it is for the Knowledge worker. In addition, the Call Agent will have access to self-evaluations. The Call Agent can run the OAISYS Desktop Client with coaching features and customizable buttons.

Call Manager (Tracer only)

This user type has rights to their calls and any other calls the Admin enables permissions to access. In addition, the Call Manager has the ability to run reports and evaluations according to enabled permissions. The Call Manager also may have permission to the Live Calls application.

Admin User

This user type has extended rights. A user or user group with Admin permissions may be granted access to View, Edit, or Delete users or user groups. An Admin User can also view and modify permissions to users and user groups, as well as administer system devices.

CRITICAL ALARMS

3000   Port not responding - Possible Port Failure. Check under Recording Ports →Ports

3001   Board not responding - Possible Recording board failure. Check under Recording Ports →Ports

3002   Recording disk full - Recording has stopped due to lack of drive space. Check under housekeeping →stage settings.

3003   Recording disk usage exceeds high threshold - The recordings partition has met and is now exceeding the high threshold set in the housekeeping settings. Check Housekeeping →Stage Settings / Housekeeping →Drive Usage

3004   Database full - SQL Database had met its maximum size. (Note: This is only for 2005 Express Users) It Check Housekeeping →Drive Usage

3005   Database usage exceeds high threshold - SQL Database size is at or above the high usage threshold. Check under housekeeping →Purge Settings to view threshold percentages / settings.

3008   Failed to create new document / Recording failure - Check to make sure recordings folder isn't full. Make sure all OAISYS services are running and connected.

3009   Failed to update existing document - Check to make sure someone isn't currently viewing the same document that is being updated. Make sure Historian is running.

3010   CTI inoperative or non-responsive - The Level2 service is not sending information from the network element. Check status under CTI tab in Administrator.

3011   SMDR inoperative or non-responsive - The SMDR service is not sending information from the network element. Check status under SMDR tab in Administrator.

3012   Port not operational - Port has a LOS. Check port status in Recording Ports/Ports under Administrator tab.

3013   Critical Triton/software service not available - Voice Assistant Triton service has failed to start. Check Windows Services to make sure it is started.

3014   Port runtime error - Port has a runtime error. Look under Recording Ports/Ports to check status.

3015   Port startup error - Port did not start in a timely manner. Look under Recording Ports/Ports to check status.

3016   Database corruption detected - A corruption in the database has occurred. Check in the Event logs under Housekeeping for details.

3017   The recording has failed at the given port. Some or all of the recording will be lost. - A port has lost the signal during a call. Look under Recording Ports/Ports to check status.

3018   An unexpected critical error has occurred - Check Alarms under Alarm Services. Restart services.

3019   Recording disk usage meets critical threshold – documents will be deleted if they cannot be moved - Storage drive is full. Run purge or stage recordings under Housekeeping.

3020   Recording disk unavailable or inaccessible - The drive used for recording storage is unavailable. Check the system drives to make sure they are connected/ responding.

3021   Database usage meets critical threshold – documents will be deleted if you don't free space - Database is full. Run copy/clean Database under Housekeeping.

3022   Failed to recover up one or more items; i.e. files, registry keys, or databases - Files/Registry key/database was not recovered. Make sure Files/Registry key/database is valid. Try again.

3033   Failed to execute an after-call action - After Call action failed to run. Check Recording Manager/ After Call Actions to make sure it is configured correctly.

3034   Authentication needed at Mitel SRC Server - Username or Password failed at Mitel SRC. Make sure Username or Password is correct.

3035   License has expired recording ports will shut down. -

3036   Installation version mismatch among servers

3037   Failed To Monitor One or More SIP Ports

3038   Failed To Load SIP End Points

3039   Audiocodes Dongle Has Been Removed; Call Data May Not Get Captured

3040   The Automatically Generated Extension For The SIP Trunk Is Too Long.

3700   Transaction expired - Check services to see what might be causing Transaction to expire. Restart services.

MAJOR ALARMS

2000   Archive destination full. – The destination location where archived or staged recording is full. Check under Housekeeping – Stage Setting to find the destination.

2001   Backup destination full. – The destination location where the backup files are moved to is full. Check under Housekeeping – Backup Settings to find the destination.

2002   Database update failed. - The SQL Server did not receive an update. Check SQL Server to ensure its running.

2003   Unexpected port signaling. - The signaling/framing doesn't match with expected programming. Check under Ports of Port Manager.

2004   Invalid port extension. - The extension number programmed in Ports of Port Manager may not be correct or is a valid device in the PBX.

2005   Failed to stage one or more documents. - Document was not able to move to stage destination. Check under Housekeeping - Stage Settings

2006   Failed to back up database. - The SQL Server database was not backed up.Typically this may be due to the Windows account running SQL Server. Make sure SQL Server Services is logged and running with a user account that has access to write to the Backup destination.

2007   PVD not imported because the queue is full. - The database link/connection is probably down and queuing records. Check SQL Server.

2008   Staging destination unavailable. - The destination for staging is not available. Check under Housekeeping - Stage Settings.

2009   Backup destination unavailable. - The destination for backups is not available. Check under Housekeeping - Backup Settings.

2010   Failed to purge one or more database records. - Purge is not working - Check under Housekeeping - Purge Settings - Ensure SQL database is still online.

2011   Database unavailable. - Check to ensure SQL is running and that the SQL protocols are set up correctly.

2012   Failed to backup one or more items, i.e. files, registry keys, or databases. - Check to make sure drive is not full and previous backups have been made.

2013   Invalid port Agent ID - Check ACD Groups under Recording Manager to make sure there is not an error (only available on switches that have ACD integration)

2014   Failed to delete one or more stranded, temporary PVDs - Check for other possible hard drive errors.

2015   Recording file is corrupt. - Check for other possible hard drive errors.

2016   Failed to delete all or a portion of a PVD recording. - Check for other possible hard drive errors.

2017   Failure in CTI monitor. - Check to make sure CTI is still running and communicating with phone system.

2018   ACD Error - Check ACD Groups under Recording Manager to make sure there is not an error (only available on switches that have ACD integration)

2019   PVD Failure - Check to make sure hard drive is not full or giving errors.

2020   Fail to commit PVD - Check to make sure hard drive is not full or giving errors.

2021   Unexpected major exception - Check OAISYS services to be sure they are running. Make sure all portions of Admin are accessible.

2022   Import Failed - PVD Import to database failed. Check PVD Queue ☐ PVD Import

2023   Recording Failure - The recording has failed at the given recording port. Check the port in Recording Ports →Ports

2024   After-call action failure - Execution of After-Call Action failed. Check Recording Manager →After-Call Actions

2025   Database query failure - Possible SQL Issue. Check to make sure SQL Services are running.

2026   Port query failure - Check port status in Recording Ports →Ports

2027   Error in call information - Generic Error. Make sure all services are running.

2028   Fail to export PVD file

2029   Fail to find call recording

2030   Server Board diagnostic Message/Triton

2031   Call recording stopped abruptly

2032   DCN Error

2033   Completing PVD after Timeout

2034   Missing Open File ACK

2035   PVD Import Failed

2036   Failed To Append Recording

2037   Stopped Receiving Data Change Notification from SQL Server

2038   Fuzzy Match Failure

2039   ShoreTel ACD Failure

2040   Failed to User Defined Rule Stage One or More Documents (failed to move PVD files during the staging the PVD files based on a user-defined rule)

2041   Failed to User Defined Rule Purge One or More Database Records (failed to remove the call records from the database during purging of the call records based on a user-defined rule)

2042   ALI Error

2043   Lost Connection to Active Directory Domain (lost connection to AD Domain Server)

2044   SRC Device is Down

2045   OAISYS Service Center is Down

2046   Tracer Clock out of Date (Tracer date is wrong)

2047   Possible Data Corruption (Database may be corrupted)

2048   Monitor Call Count Exceeded (Number of calls detected exceeded max for the system)

2700   Detected devices with duplicate extension - Check to ensure you do not have the same extension programmed twice in Recording Ports →Ports. Also verify you don't have a trunk ID and extension with the same ID.

2701   Fail to open TAPI line - Applies to PBX with TAPI integration. Check TAPI settings in the PBX programming.

2702   Node down - Tracer has lost connection to remote nodes. Check to make sure network connectivity exists between nodes. Check Network Configuration under the Remote Nodes Tab.

2703   Database error - Generic Error. If this is repeated, a call to support may be needed.

2704   Fail to decode PBX message - Check CTI connection to make sure it is up and running properly.

2705   Call already connected to this device; Possible missed event = possibly a missed CTI event. Check under CTI in the admin portion of the client to verify PBX connectivity.

2706   Lost connection to PBX - OAISYS CTI has lost its connection to the phone system. Check under CTI in the admin portion of the client to verify PBX connectivity.

2707   Late TAPI reply - Information Message related to TAPI PBX integration. Possibly check network latency.

2708   Extension not TAPI line

MINOR ALARMS

1000   Cannot read copy key

1001   Maintenance to expire in 1 month

1002   Maintenance expired

1003   User exceeded login attempts

1004   Client exceeded connection attempts

1005   Expected port event on call start

1006   Expected port event on call stop

1007   Expected CTI event on call start

1008   Expected CTI event on call stop

1009	Discovered One or More Stranded, Temporary PVDs on the Server
1010	Fail to email
1011	No user programmed for screen capture
1012	Non critical service not available - Triton
1013	Failed to update system stats
1014	Database usage meets the critical threshold. System Stats Would Cease to Replicate.
1015	Third party API call ends abruptly
1016	Fail to create third party API call
1017	Failed To Update One or More System Strings
1018	Error in Recording Meta Data Module
1019	Suspended Completed Call Will Now Be Forced To Be Completed
1020	SMDR Port Error
1021	ALI Port Error
1700	OAI command from client unhandled
1701	Clear idle call
1702	Unexpected sequence number
1703	SNMP query error

INFORMATIVE ALARMS

0	User Login
1	User Logout
2	Daily stats on PVDs created
3	Stats on the Stage Housekeeping task
4	Stats on the Purge Housekeeping task
5	Stats on the Orphan Recovery Housekeeping task
6	Stats on Recordings Drive Usage
7	Stats on PVD Database Usage
8	Stats on Staging Destination Drive Usage
9	Stats on Backup and Recovery Task
10	Stats on the restore housekeeping task
11	Stats on the database maintenance housekeeping
12	User Call Monitor
13	Call Recording Accessed
14	WXT conversion pre-requisite error
15	Unexpected event

16	Fail to start recording manually
17	Fail to stop recording manually
18	Fail to add annotation
19	Stats on the Clean Database Task
20	Awaiting connection from screen capture client
21	DCN Service is restarting
22	Audiocodes Dongle Added
23	Audiocodes Quota Exceeded; Data for Calls That Exceed the License Will Be Lost
24	Dynamic License Exceeded, the Call Would Not Be Recorded On Dynamic Licensed Ports
25	"Short Circuit" Media Session
26	Historical Folder Wait Time Average Exceeds Max Threshold (Only generated when Tracer is placed into test mode)
27	Historical Folder Wait Time Max Exceeds Max Threshold (Only generated when Tracer is placed into test mode)
700	Link to PBX is up and running