



BroadWorks

BroadSoft Partner Configuration Guide

OAISYS Tracer and Talkument Solutions

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BroadWorks® Guide

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Document Revision History

Version	Reason for Change
1.1	Introduced document for OASYS Tracer /Talkument version 7.3.0 validation with BroadWorks Release 18.SP1.
1.2	



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1 Overview

This document describes the configuration procedures required for the OAISYS Tracer and Talkument solution to be interoperable with BroadWorks.

The OAISYS Tracer and Talkument solutions are full-featured call recording applications that enables service providers to deliver contact center management, legal and regulatory recording, as well as general purpose call recording known as “voice documentation.”

This guide describes the specific configuration items that are important for use with BroadWorks. It does not describe the purpose and use of all configuration items within the OAISYS Tracer and Talkument solutions. For those details, see the *OAISYS Installation and Configuration Guide [1]* supplied by OAISYS.

OAISYS Tracer and Talkument solutions integrate with BroadWorks using the BroadWorks Call Recording Interface and Call Recording Service, which is available on Release 17.sp4 and beyond.

The BroadWorks Call Recording Service (CRS) allows each user to be designated for recording (Always or OnDemand) so that when that user makes a phone call, the CRS will automatically (a) make a “recording tap” call to the OAISYS Tracer or Talkument solution as well as (b) providing information about the user and the other parties on the call. OAISYS will then automatically record that user’s phone conversation

Users can then use an OAISYS Playback client to view their calls as well as listen to, annotate, and privately share those calls.

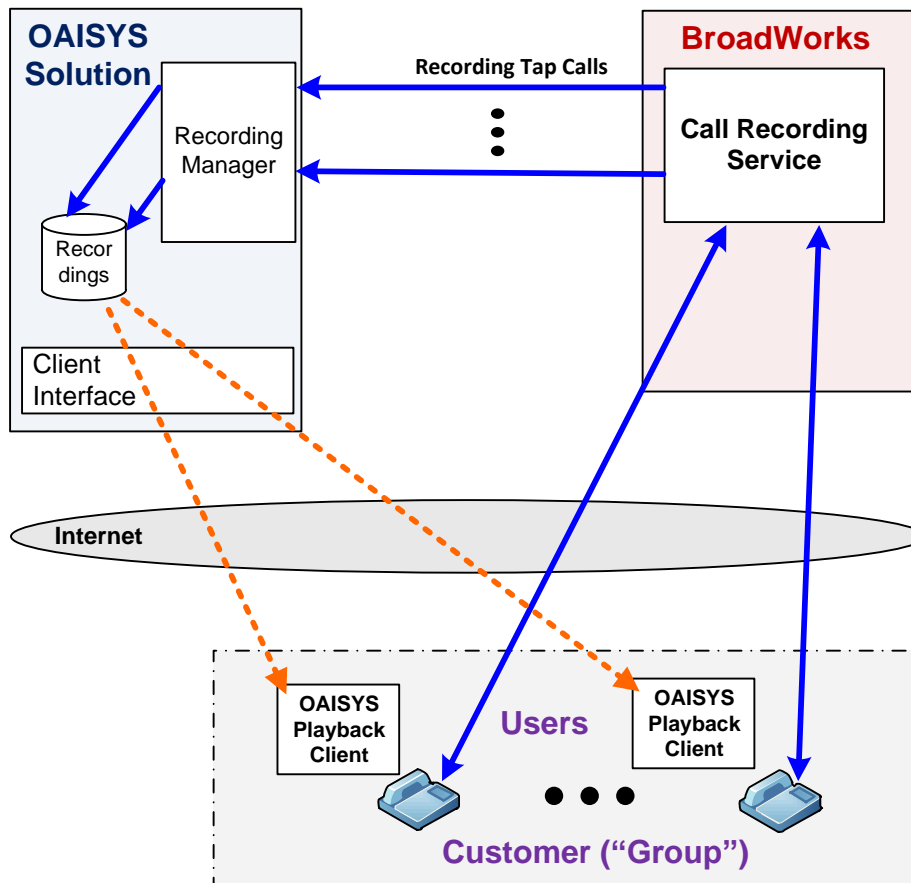


Figure 1: Cloud Configuration

The OAISYS Tracer and Talkument solutions can be located “in the cloud,” as shown in Figure 1, but for customers who do not want to keep copies of recorded conversations “in the cloud,” the OAISYS call recording server can just as easily be located at the customer site.



2 Interoperability Status

This section provides the known interoperability status of the OAISYS Tracer and Talkument solutions with BroadWorks. This includes the version(s) tested, capabilities supported and known issues.

Interoperability testing validates that the device interfaces properly with BroadWorks via the SIP interface. Qualitative aspects of the device or device capabilities not affecting the SIP interface such as display features, performance, and audio qualities are not covered by interoperability testing. Requests for information and/or issues regarding these aspects should be directed to OAISYS.

2.1 Verified Versions

The following table identifies the verified OAISYS Tracer and Talkument solutions and BroadWorks versions and the month/year the testing occurred. If the device has undergone more than one test cycle, versions for each test cycle are listed, with the most recent listed first.

Compatible Versions in the table below identify specific OAISYS Tracer and Talkument versions which the partner has identified as compatible and should interface properly with BroadWorks. Generally, maintenance releases of the validated version are considered compatible and may not be specifically listed here. Contact OAISYS for any questions concerning maintenance and compatible releases.

Verified Versions Table			
Date (mm/yyyy)	BroadWorks Release	Tracer/Talkument Verified Version	Tracer/Talkument Compatible Versions
08/2012	18.SP1	V7.3.0	Any maintenance version of verified version.

2.2 Known Issues

This section lists the known interoperability issues between BroadWorks and specific partner release(s). Issues identified during interoperability testing and known issues identified in the field are listed.

The table below provides a description of each issue and, where possible, identifies a workaround. The verified partner device versions are listed with an "X" indicating that the issue occurs in the specific release. The issues identified are device deficiencies or bugs, so typically not BroadWorks release dependent.

The *Issue Number* is a BroadSoft ExtraView partner issue number if the testing was performed by BroadSoft. If the testing was performed by the partner or a third party, the partner may or may not supply a tracking number.

For more information on any issues related to the particular partner device release, see the partner release notes.

Issue Number	Issue Description	Partner Version
--------------	-------------------	-----------------



		V7.3.0			
EV157223	Call Record On-Demand fails to activate for network conference After network conference is setup, the network conference initiator cannot activate Call Record On-Demand. Workaround: none	X			X

3 BroadWorks Configuration

This section describes the general steps required to enable BroadWorks for Call Recording.

3.1.1 Add Call Recording Device on AS

Add Call Recorder from AS CLI to allow it is available for use.

```
AS_CLI/Service/CallRecording> add [name] [netAddress] [port]
[transportType] [mediaStream] description [description label]
```

```
AS_CLI/Service/CallRecording>add Oaisys 63.156.187.195 5060 UDP
dual
```

Notes:

- For the [transportType] the Oaisys system can communicate via either UDP or TCP, however UDP is typically used.
- For the [mediaStream] the Oaisys system supports either “dual” or “single” stream, however “dual” is typically used.

3.1.2 Authorize Call Recording Service to User

Authorize Call Recording service from Group -> *Resources*->*Services* screen.

3.1.3 Configure Group Call Recording Platform

Configure the group with Call Recorder added in step 3.1.1 from Group-> *Resources*-> *Group Call Recording Platform* screen.

[System](#) > [Interoperability](#) > [Oaisys](#)

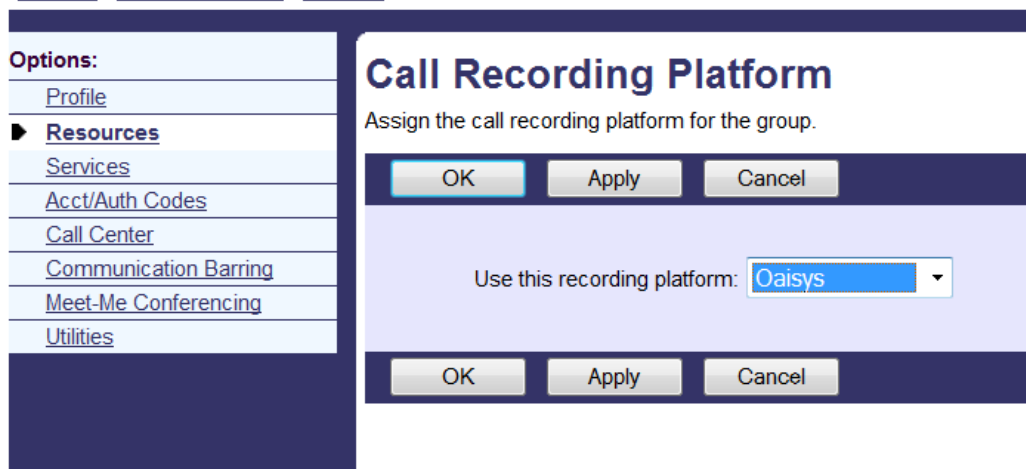
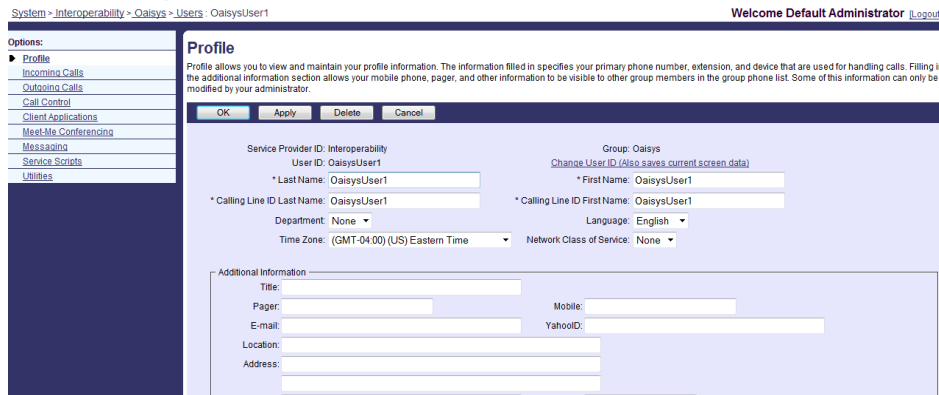


Figure 2: Configure Call Recording Platform

3.1.4 Create Group Call Recording User

Create a user in the group as the Call Recording User. Ensure the Call Recording service is assigned to the user.



System > Interoperability > Oaisys > Users : OaisysUser1 Welcome Default Administrator [Logout](#)

Options:

- Profile
- Incoming Calls
- Outgoing Calls
- Call Control
- Client Applications
- Meet-Me Conferencing
- Messaging
- Service Scripts
- Utilities

Profile

Profile allows you to view and maintain your profile information. The information filled in specifies your primary phone number, extension, and device that are used for handling calls. Filling in the additional information section allows your mobile phone, pager, and other information to be visible to other group members in the group phone list. Some of this information can only be modified by your administrator.

OK Apply Delete Cancel

Service Provider ID: Interoperability Group: Oaisys
 User ID: OaisysUser1 [Change User ID \(this saves current screen data\)](#)

* Last Name: OaisysUser1 * First Name: OaisysUser1

* Calling Line ID Last Name: OaisysUser1 * Calling Line ID First Name: OaisysUser1

Department: None Language: English

Time Zone: (GMT-04:00) (US) Eastern Time Network Class of Service: None

Additional Information

Title: _____

Pager: _____ Mobile: _____

E-mail: _____ YahooID: _____

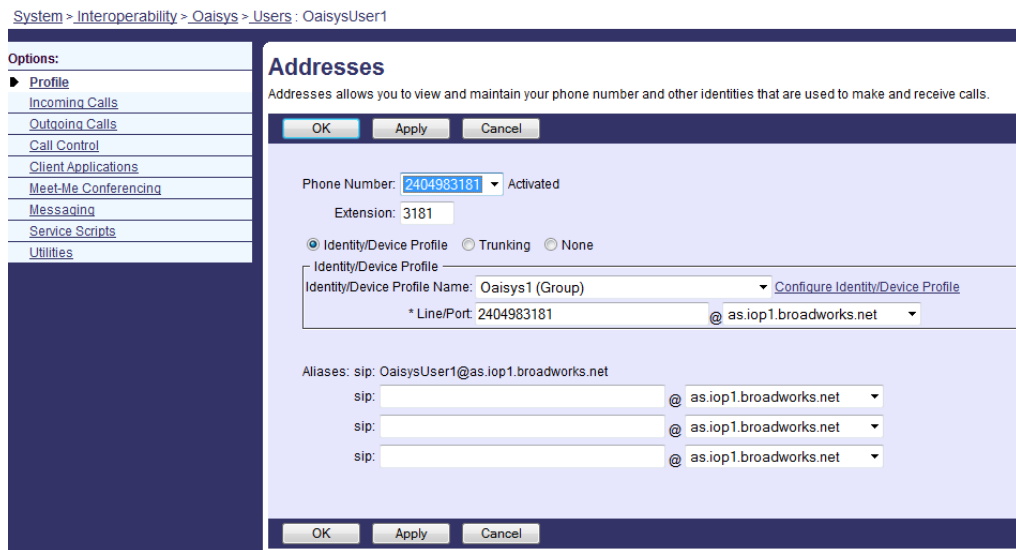
Location: _____

Address: _____

Figure 3: Create Group Call Recording User

3.1.5 Configure Call Recording User Address

Configure the Call Recording user's address information.



System > Interoperability > Oaisys > Users : OaisysUser1

Options:

- Profile
- Incoming Calls
- Outgoing Calls
- Call Control
- Client Applications
- Meet-Me Conferencing
- Messaging
- Service Scripts
- Utilities

Addresses

Addresses allows you to view and maintain your phone number and other identities that are used to make and receive calls.

OK Apply Cancel

Phone Number: 2404983181 Activated

Extension: 3181

Identity/Device Profile Trunking None

Identity/Device Profile

Identity/Device Profile Name: Oaisys1 (Group) [Configure Identity/Device Profile](#)

* Line/Port: 2404983181 @ as.iop1.broadworks.net

Aliases: sip: OaisysUser1@as.iop1.broadworks.net

sip: _____ @ as.iop1.broadworks.net

sip: _____ @ as.iop1.broadworks.net

sip: _____ @ as.iop1.broadworks.net

OK Apply Cancel

Figure 4: Configure Group Call Recording User Address

3.1.6 Assign Call Recording User service

Assign Call Recording service to a user from user->Profile->Assign Services screen.

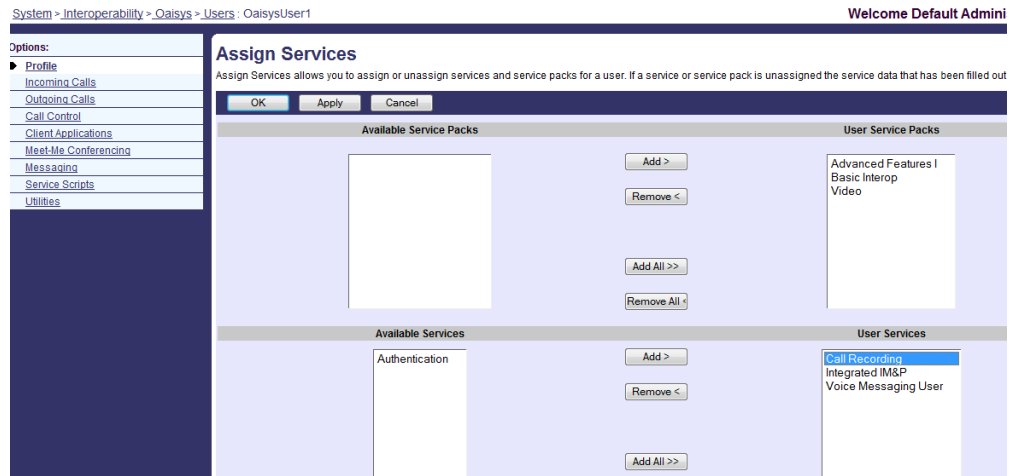


Figure 5: Assign Call Recording Service

3.1.7 Configure User Call Recording Service

Configure user Call Recording service from user->*Call Control*-> *Call Recording* screen. The Call Recording service, when provisioned for the user, can be turned on by selecting *Always* or *On-Demand* or can be turned off by selecting *Never*.

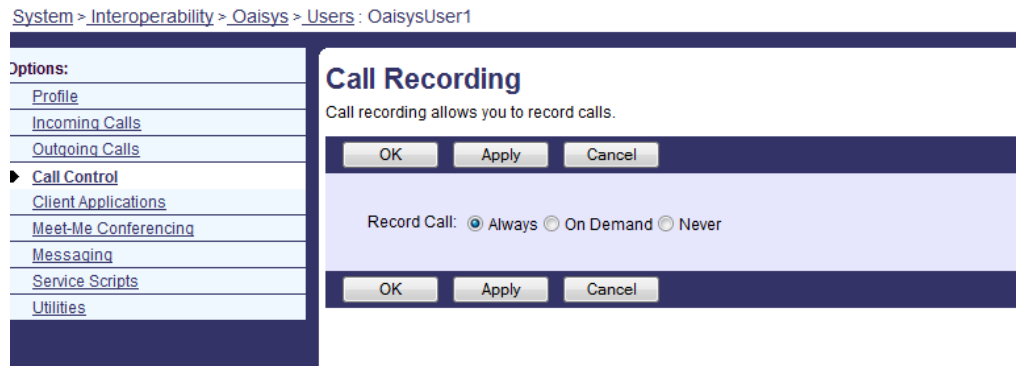


Figure 6: Configure Call Recording Service



4 OAISYS Solution Configuration

The capabilities of the OAISYS Tracer and Talkument solutions have been verified for use with BroadWorks based on the settings described in this section.

OAISYS Tracer and Talkument solutions integrate with BroadWorks using the Broadworks Call Recording Service (CRS). The Broadworks CRS will automatically place SIP “recording tap” calls to the OAISYS server for each call that is to be recorded.

When a “recording tap” call is received from the CRS, in addition to the audio stream of the call, specific information about the call is also provided. This includes: the User being recorded, information about the other party on the call, direction of the call, as well as the recording ‘type’.

The recording ‘type’ can be “On Demand” or “Always” based on the user’s BroadSoft configuration. For “On Demand” calls OAISYS will record the audio of the call, but if during the call the user doesn’t request to “keep” the recording then upon completion of the phone call the audio for the call will be deleted. For users who are setup with “Always” record, all of their calls will be recorded and retained.

Each user can then use a web browser to access one of the OAISYS Playback clients to view their calls as well as listen to, annotate, and privately share those calls.

Following are highlights of the provisioning/configuration of the OAISYS system. For more detail please refer to *OAISYS Installation and Configuration Guide [1]*.

4.1 OAISYS Instances

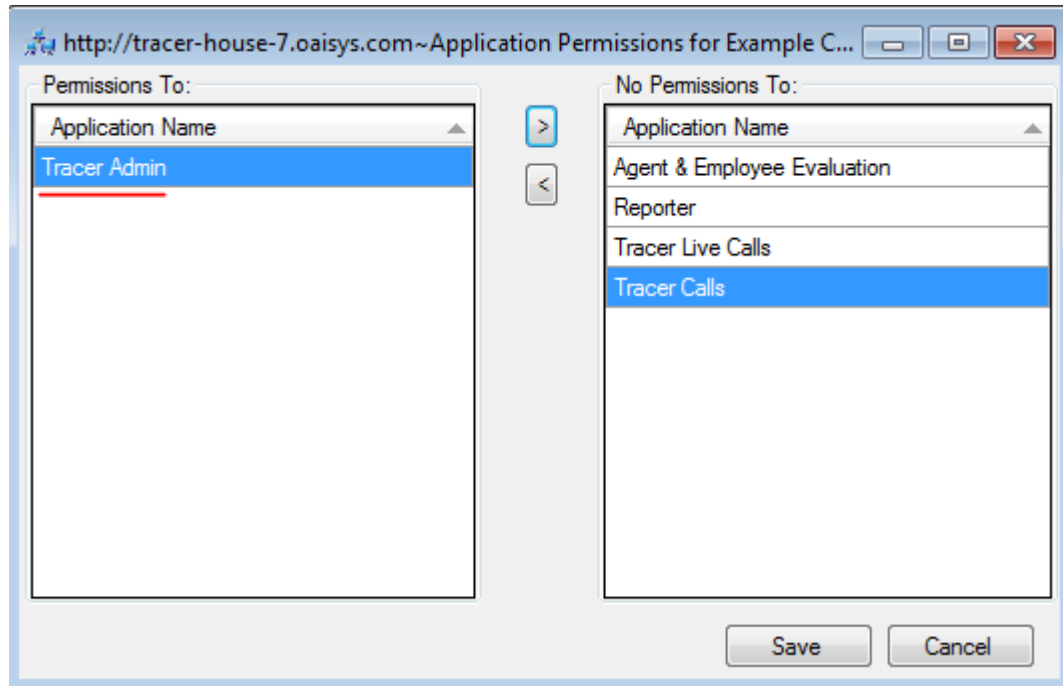
A unique OAISYS instance needs to be configured for each “Group” that will use OAISYS call recording. This insures that recordings and call data for each customer (Group) is completely isolated from all others. There are a number of ways to create an OAISYS instance per details shown in the *OAISYS Instancing Guide [1]*.

Note: The OAISYS Tracer or Talkument solutions can be located in the cloud, or, for customers who do not want to keep copies of recorded conversations “in the cloud,” the OAISYS call recording server can instead be located at the customer site.

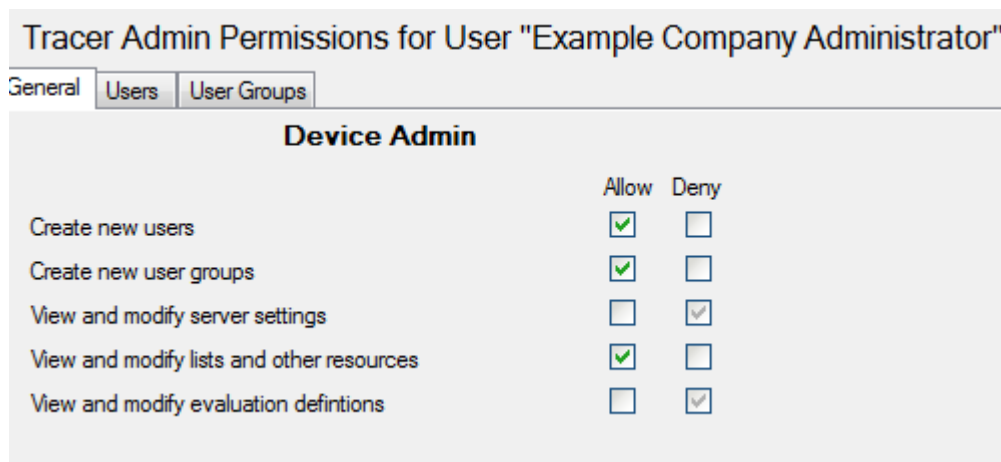
Once the OAISYS instance has been created for the “Group,” the following areas need to be configured.

4.2 Admin Users

Typically at least one “Group” administrator account should be created on the OAISYS Tracer or Talkument solution for use by the company administrator. That “Group” administrator account should be setup with at least the “Tracer Admin” permission.



Then this “Group” administrator account should be configured to allow this user to create all other user accounts by checking “Allow” for the following permissions: “Create new users”, “Create new user groups” and “View and modify lists and other resources”.



4.3 Individual Users

Each time the OAISYS system makes a recording for a BroadSoft user, that user's BroadSoft username will be used as the "Extension" field in the recording.

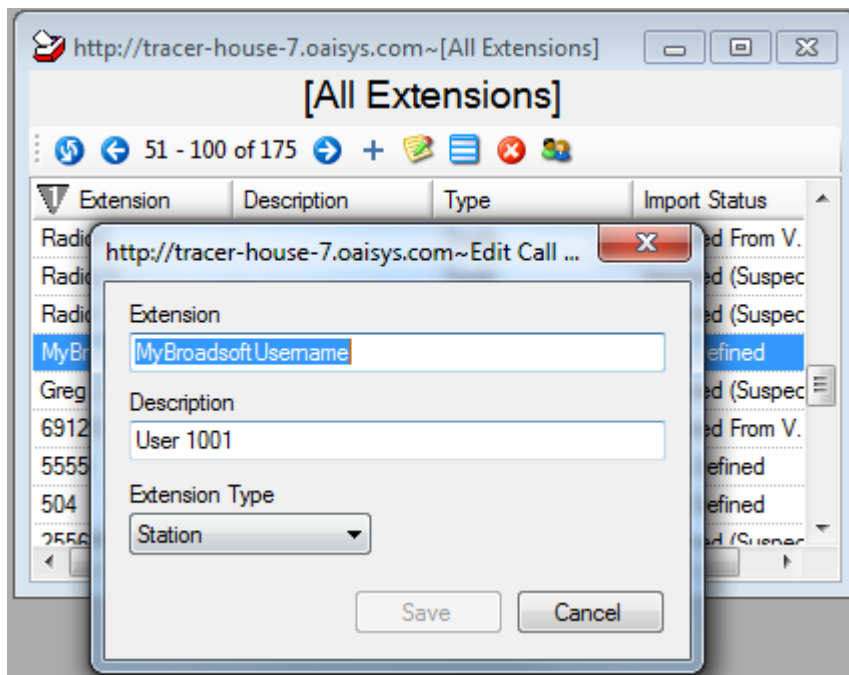
Extension: <BroadSoft Username>

For a user to listen and view his/her call recordings, a user account will need to be created on the OAISYS system by a system administrator. Once that user's account has been created, they will be able to logon to the OAISYS system and view & listen to their calls.

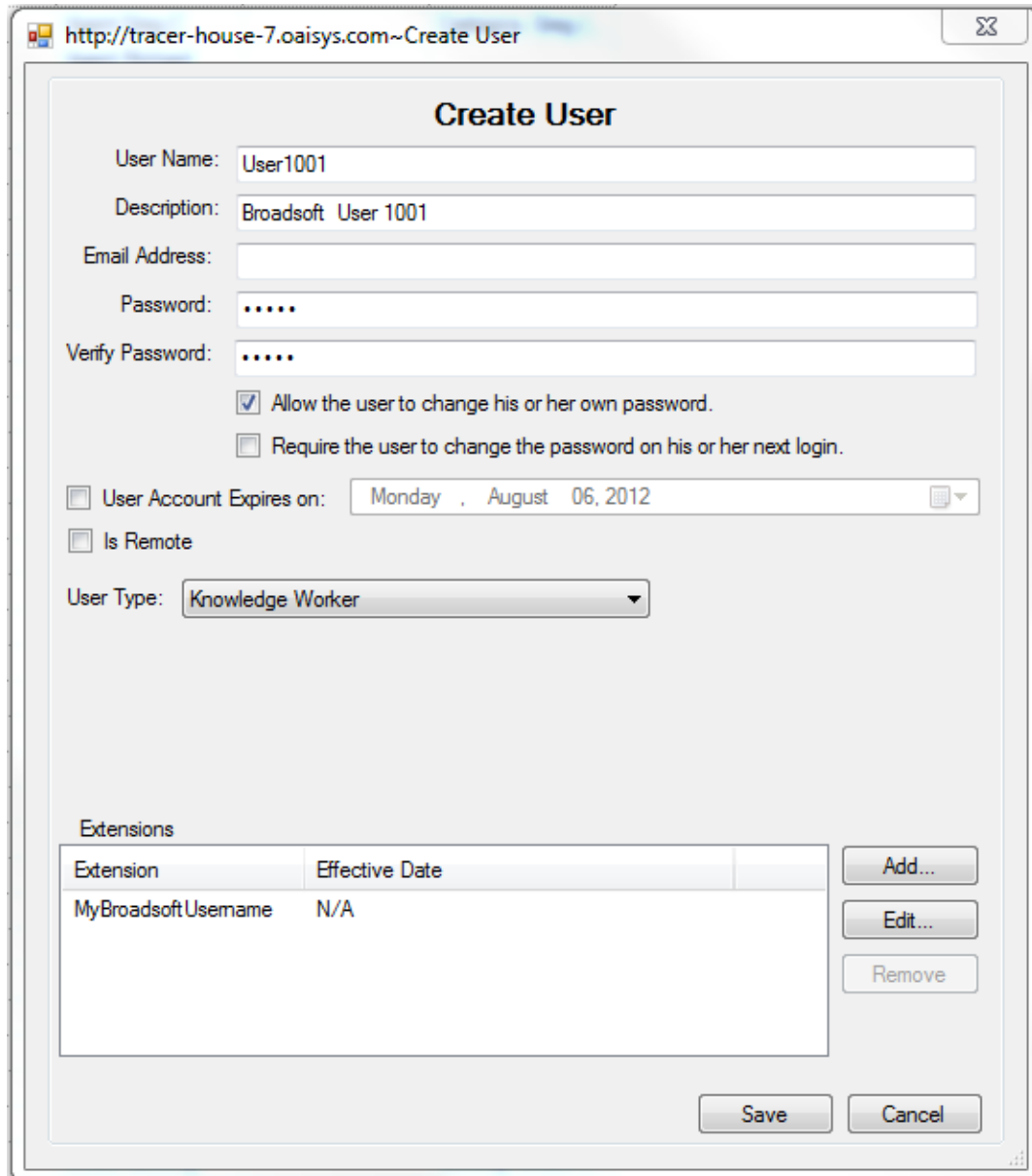
Creating user accounts can be done by any account with "Tracer Admin" permission and the appropriate permissions enabled (like the "Group" administrator account discussed in the previous section).

Creating each user account involves two steps:

Step #1: Create the Extension in the "All Extensions" list.



Step #2: Create a user account for that Extension.



The screenshot shows a web browser window with the address bar displaying "http://tracer-house-7.oaisys.com~Create User". The main content area is titled "Create User" and contains the following fields and options:

- User Name:
- Description:
- Email Address:
- Password:
- Verify Password:
- Allow the user to change his or her own password.
- Require the user to change the password on his or her next login.
- User Account Expires on:
- Is Remote
- User Type:

Below these fields is an "Extensions" table:

Extension	Effective Date
MyBroadsoft Username	N/A

To the right of the table are three buttons: "Add...", "Edit...", and "Remove". At the bottom of the form are "Save" and "Cancel" buttons.

4.4 BroadSoft Interface Plugin

The OAISYS integration with the BroadSoft switch is accomplished by the BroadSoft Interface plugin (or applet). This applet needs to be enabled (typically) on the OAISYS server and then it should be configured to operate as desired for the installation. The following are the parameters that are configurable:

- SIP port number – This is the port number on which the applet will expect to receive SIP calls from the BroadSoft switch. Typically the default of 5060 is used.
- RTP port Start – This the beginning port number of a range of ports that will be used to receive RTP (audio) streams from the BroadSoft switch.
- Max RTP port Count – This is the maximum number of RTP ports that will be used. This value should be at least four times greater than the setting for “Maximum Number of Simultaneous calls”.
- Maximum Number of Simultaneous calls – This is the number of calls that OAISYS will record simultaneously. Note: Licensing is required for each simultaneous call (please refer to the “Licensing” section for details).
- NetServer Host Name – Typically the applet operates on the same server as the OAISYS Solution in which case the default value of “localhost” should be used.
- NetServer Port Number – This value should be set to the value that the OAISYS NetServer uses for communication. Typically the default value of 8767 is used.
- Public IP Address – Sometimes for SIP calls to work properly a public static IP address needs to be used. When that is the case, the “Use Public IP” option should be checked and the public IP address provided.
- Recording Path – The path to the root directory where the recording files will be stored. When the applet is installed on the same server as the OAISYS Tracer or Talkument solutions, this field can be left blank and the standard OAISYS recording folder will be used.



Broadsoft Interface Service Admin









 SIP Port Number:	<input type="text" value="5060"/>	 NetServer Host Name:	<input type="text" value="localhost"/>
 RTP Port Start:	<input type="text" value="35000"/>	 NetServer Port Number:	<input type="text" value="8767"/>
 Max RTP Port Count:	<input type="text" value="500"/>	 Maximum Number of Simultaneous Calls:	<input type="text" value="100"/>
 Public IP Address:	<input type="text" value="70.98.168.139"/>	<input checked="" type="checkbox"/> Use Public IP	
 Recording Path:	<input type="text"/>	<input type="button" value="Browse"/>	
<input type="button" value="Apply Changes"/>			

Figure 7: BroadWorks Interface Service Admin



Notes:

- a. The OASYS system automatically supports UDP or TCP communication from BroadSoft so there is no configuration necessary for this.
- b. The OASYS system automatically supports either “dual” or “single” media streams from BroadSoft, so there is no configuration necessary for this.

4.5 Licensing

An OASYS license is needed for each concurrent call that will be recorded. So for example, for 10 calls to be recorded at the same time, the OASYS system would need to be equipped with a licensing for a minimum of 10 “Port” licenses.

4.6 Other OASYS Configuration

The OASYS Tracer and Talkument solutions have many additional features that can be configured to be used by the “Group”/customer. Please refer to the *OASYS Installation and Configuration Guide [1]* for configuration and use of these features.

4.7 OASYS Features

Some OASYS features are not presently supported by this BroadSoft integration. Following is a list of the main features not currently supported:

- Live Call monitoring.
- After-Call actions
- OASYS recording triggers



References

- [1] OAISYS, Inc. 2012. *OAISYS Software Only Installation Guide*. Available at: http://www.oaisys.com/downloads/OAISYS_Software_Only_Install_Guide.pdf
- [2] BroadSoft, Inc. 2011. *BroadWorks Call Recording Interface Guide*. Available from BroadSoft at www.broadsoft.com/xchange.
- [3] OAISYS, Inc. 2012. *OAISYS Instancing Guide*. Available at: http://www.oaisys.com/downloads/OAISYS_Instances.pdf