

# OAISYS Net Server



## Operations Manual

Version 4  
3/2003



**Computer Telephony Solutions, Inc.**  
9831 South 51st Street, Suite C-119  
Phoenix, AZ 85044  
(480) 496-9040



## Table of Contents

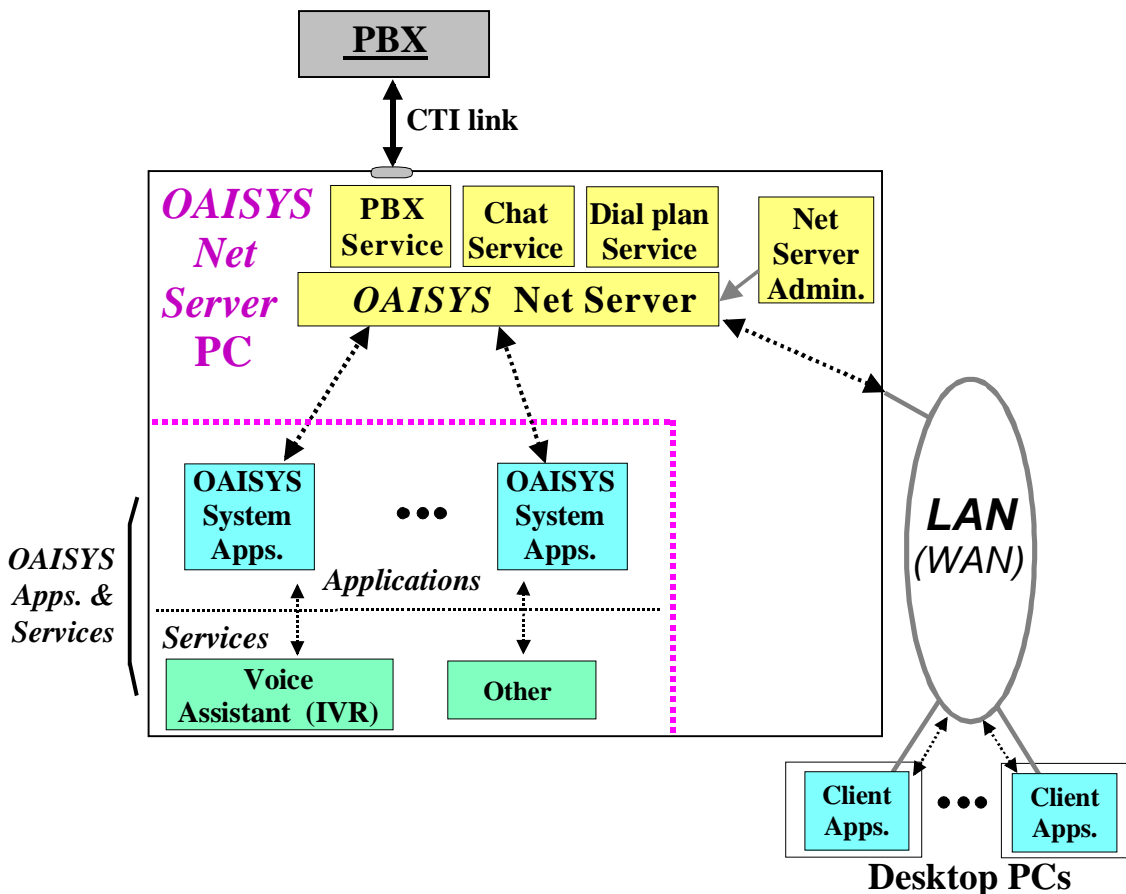
|  |    |
|--|----|
| Overview.....                                    | 1  |
| Net Server Components .....                      | 2  |
| System-Level Client Applications.....            | 3  |
| Desktop-Level Client Applications .....          | 3  |
| Requirements .....                               | 4  |
| PC Requirements.....                             | 4  |
| LAN Requirements .....                           | 4  |
| Power-Up.....                                    | 4  |
| Installation .....                               | 5  |
| OASYS Net Server.....                            | 6  |
| Clients .....                                    | 6  |
| Services.....                                    | 7  |
| Copy Key .....                                   | 8  |
| Errors & Troubleshooting .....                   | 9  |
| Zip Log Utility .....                            | 9  |
| Level2 Service .....                             | 10 |
| Events .....                                     | 14 |
| Errors & Troubleshooting .....                   | 16 |
| Dial Plan Server .....                           | 17 |
| Status.....                                      | 17 |
| OASYS App Server-16.....                         | 20 |
| Errors & Troubleshooting .....                   | 22 |
| OASYS Net Server Administrator .....             | 23 |
| Application Users.....                           | 26 |
| Appendix A-Using App Server-16 .....             | 28 |
| Appendix B- Net Phone Server Configuration ..... | 30 |
| Appendix C- Replay Users.....                    | 39 |
| Appendix D- OASYS Feature Points Explained ..... | 49 |

### Overview:

*OAISYS Net Server* is the next generation server product and the cornerstone component of the OAISYS Net Suite of products from **Computer Telephony Solutions, Inc.** The *OAISYS Net Server* supports remote clients over a TCP/IP LAN (and/or WAN). Thus, in addition to running the existing OAISYS applications (both old and new versions), it can also support hundreds of simultaneous desktop applications.

### Net Server Components

*OAISYS Net Server* – This is the main program and it manages all of the service sub-components as well as all of the System-level and Desktop-level client applications. Please refer to the following diagram to see how all of the components interact.



**Figure 1: Net Server and Version 4.0 OAISYS System Applications**

- **Level2 Service** – This is a service sub-component of the *Net Server* that actually connects to either (1) the COM port or (2) TCP/IP port and interfaces to the PBX System.
- **OAISYS Net Server Administrator** – This is the configuration program for the *Net Server*. Typically it is installed and runs on the same PC as the *Net Server*, but it can be used from another PC on the LAN to ‘remotely’ administer the *Net Server*.
- **OAISYS App Server-16** – This is a client program of the *Net Server* and it is used to either (1) simulate the functions of the previous *OAISYS Server* to older OAISYS applications (versions

previous to 3.0 such as *Park & Page*, *ACD Manager*, *Auto Call Record*, or (2) provide a Unifier interface for applications such as the *TASKE* Information Collector (see drawing above). *App Server-16* can be installed on the same PC as *Net Server* or it can be installed on a different PC on the LAN. This would allow the connected applications to be installed and run on a different PC from the *Net Server*.

### **System-Level Client Applications**

System-level applications are those that are designed to be run on a single server PC (usually the OAISYS Net Server PC). These system-level applications make use of the services of *OAISYS Net Server* to perform their functions.

- **Version 4.0 OAISYS Applications** – A number of new system-level OAISYS applications have been developed and these run directly on the OAISYS Net Server PC. These new system level OAISYS application are 32-bit versions of *Park & Page*, *Auto Call Record*, *ACD Manager*, *Voice Assistant*, and *Call Router*.
- **Older Versions OAISYS Applications** – The OAISYS applications previous to version 3.0 are supported by *OAISYS Net Server* by using the *App Server-16* module described above. These OAISYS applications can be loaded and run on the same PC as *OAISYS Net Server*. However if the OAISYS Net Server PC is running the Windows NT operating system, then these OAISYS applications (and the *App Server-16*) must be loaded on a separate Windows '95 (or Win '98) PC and connected via LAN to the OAISYS Net Server PC.
- **3<sup>rd</sup>-Party Applications** – Applications developed by other companies can be designed to be compatible with the OAISYS Net suite of products. **Taske Technology Inc.** has designed the *TASKE Contact* to be fully compatible with *OAISYS Net Server* via *OAISYS App Server 16*.

### **Desktop-Level Client Applications**

Desktop-level applications are those that are designed to be run on multiple desktop PCs which are connected via LAN to the OAISYS Net Server PC. These desktop-level applications make use of the services of *OAISYS Net Server* remotely over the LAN. Following are examples of some of the existing applications available from **Computer Telephony Solutions, Inc.**

- **OAISYS Net Phone** – This is a PC Phone client that can be used to make and receive phone calls as well as provide screen-pop and database dialing to/from various 3<sup>rd</sup>-party applications (such as Microsoft Outlook).
- **OAISYS Group DSS** – This a DSS program that uses a virtual OAI connection from *Net Server* to monitor phone status.
- **OAISYS Chat** – This is a program that can be used to initiate and receive Chat Calls to/from other desktop PCs running an equivalent Chat program. This program utilizes the Chat Service of *OAISYS Net Server*.

## Requirements

### PC Requirements

The following table defines the PC requirements for running OAISYS *Net Server*, the OAISYS server-side applications (*Voice Assistant*, *Database Assistant*, *Call Router*, etc.) and TASKE.

Microsoft no longer provides official support for Windows 95. TASKE and CTS no longer support Server applications on Windows 95 or 98.

| Voice Assistant Configuration | Windows NT / Windows 2000 <sup>2</sup> |                                |
|-------------------------------|--|--------------------------------|
|                               | Minimum                                | Recommended                    |
| No ports                      | Pentium II 266<br>128Mb RAM            | Pentium II 350<br>128Mb RAM    |
| 12 ports or less <sup>3</sup> | Pentium II 266<br>128 Mb RAM           | Pentium II 350<br>128Mb RAM    |
| Between 12 and 24 ports       | Pentium II 266<br>128Mb RAM            | Pentium III 600<br>128Mb RAM   |
| Over 24 ports                 | Pentium II 266<br>256Mb RAM            | Pentium III 600+<br>256Mb+ RAM |

#### Notes to the Table

1. NT Workstation or Windows 2000 Professional is generally acceptable but NT Server / Windows 2000 Server is required if TASKE is using 10 or more supervisor/agent desktop licenses and recommended for any OAISYS configuration of 24 ports or more.
2. Dialog/4, Proline/2V, and ISA T1 voice cards require 1 ISA per card. D/4-PCI and PCI T1 cards require one PCI slot per card. All T1 boards require a full-length slot.

#### Other Requirements:

- 1 RS-232 Communications Port
- 1 Standard Parallel Port
- CD ROM Drive
- 3 ½" Floppy Drive
- Network Interface Card
- Hard Drive (size/ disk access requirements vary dramatically based on the applications being run)

#### Other Recommendations:

- Industrial grade hardware components appropriate to a mission-critical server
- Additional RS-232 communications ports as may be required
- Modem
- PcAnywhere* Remote software

## LAN Requirements

The *OAISYS Net Server* PC communicates with desktop clients on a Microsoft network over TCP/IP so this type of network must be installed and running. If a site already runs a different network protocol, such as Novell IPX/SPX, that site will need to run a dual stack configuration.

The *OAISYS Net Server* PC should be assigned a fixed IP address (not a dynamically assigned IP address) to minimize problems for client programs using the server.

## Installation

The *OAISYS Net Server* software should be installed on the Net Server PC using the following steps:

1. Run the SETUP.EXE program to install *OAISYS Net Server* on the server PC. This should install: (1) *OAISYS Net Server*, the (2) *Level2 Service*, and (3) *Copy Key* (4) optionally *App Server-16*.

Note: You should always install *OAISYS Net Server* to automatically run at Startup so it starts whenever the Server PC is reset or restarted.

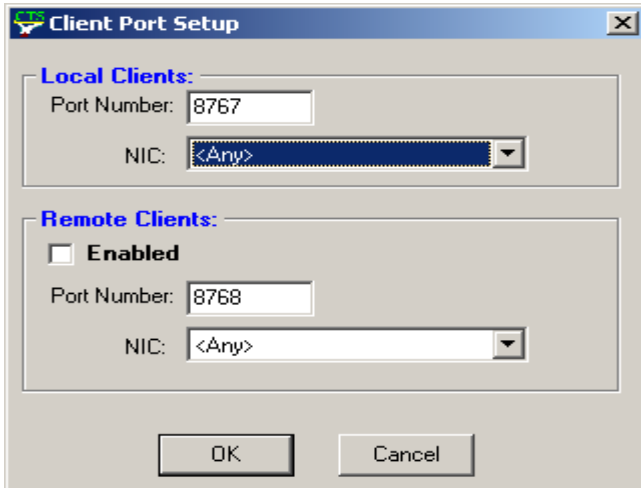
**Note:** This installation program installs some of the very latest OLE files from Microsoft, so during the installation (depending on the configuration of the target PC), the installation program may require you to Reset your PC and restart the installation a 2<sup>nd</sup> time.

2. Mount the OAISYS software key on the parallel port (LPT1) of the server PC.
3. Make the appropriate connections to your PBX.
4. Run the *OAISYS Net Server* program that should then automatically start *Level2 Service* (and the other services).
5. Configure your *Level2PBX Service* and get it fully operational (see page **Error! Bookmark not defined.**)
6. Configure *OAISYS Net Server* get it fully operational (see page 6)

## OAISYS Net Server

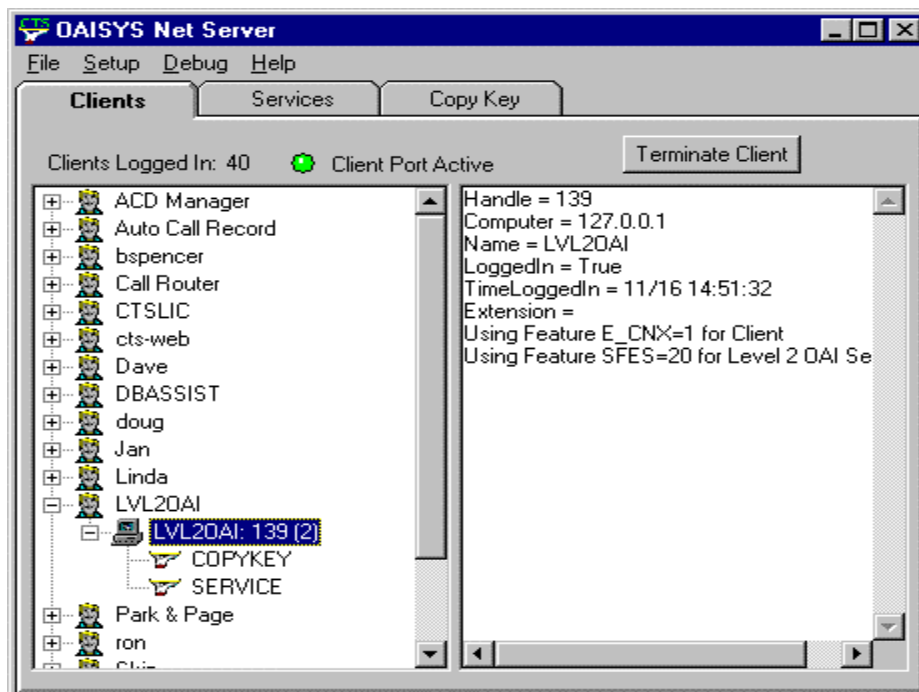
### Setup Menu/Client Port Setup

This window provides a way to enable another port for using Net Server and Net Phones through a fire-wall. You have to tell it which port you want to use and which network card. See the Net Server Administrator setup for configuring the Net Phone clients.



### Clients

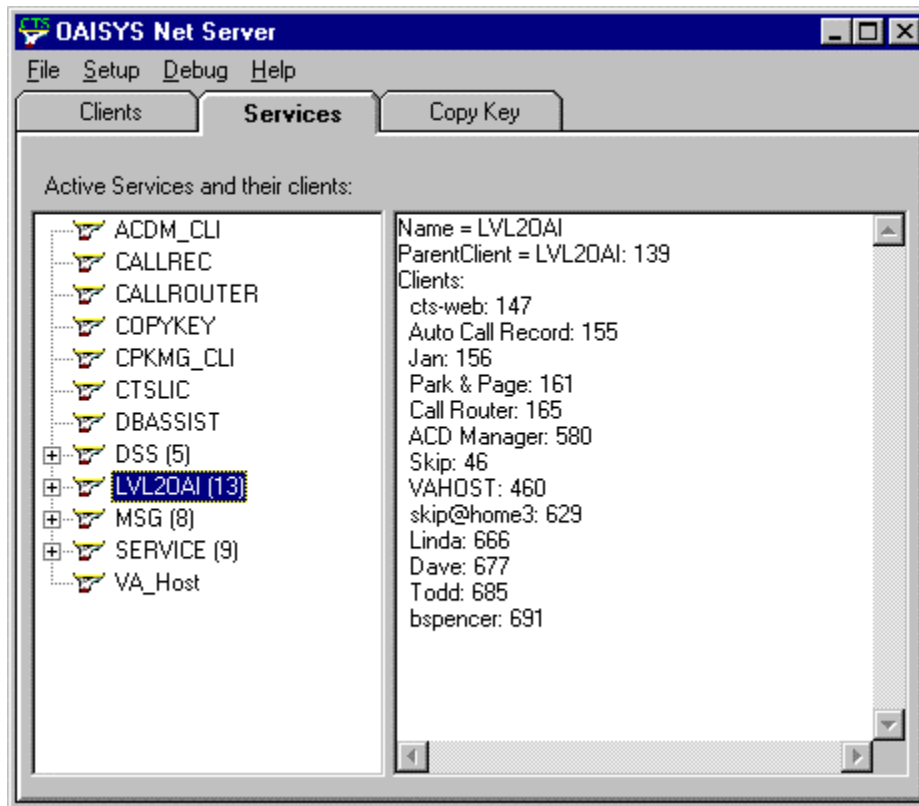
This window provides a view of which clients are presently logged into the server. This window is used by technical support to monitor the program activity.



## Services

This window shows which services are presently operating with the server. Some services (like COPYKEY, MSG, and SERVICE) are part of the server and are always present. Other Services will appear in this list when they are provided by other programs. For example, the services of DSS and the PBX Service will appear when the *PBX Service* is operating correctly. By highlighting a service and right clicking on the service, you can bring up a menu that gives you the option to **Show Service Window**, **Hide Service Window**, or **Shutdown Service**. If you select **Show Service Window**, the service window will be displayed. If you select **Hide Service Window**, the service window will disappear. In this case, there will no longer be an icon across the bottom of the desktop nor in the system tray, however, the service will still be running. If you select **Shutdown Service**, the service will be shut down.

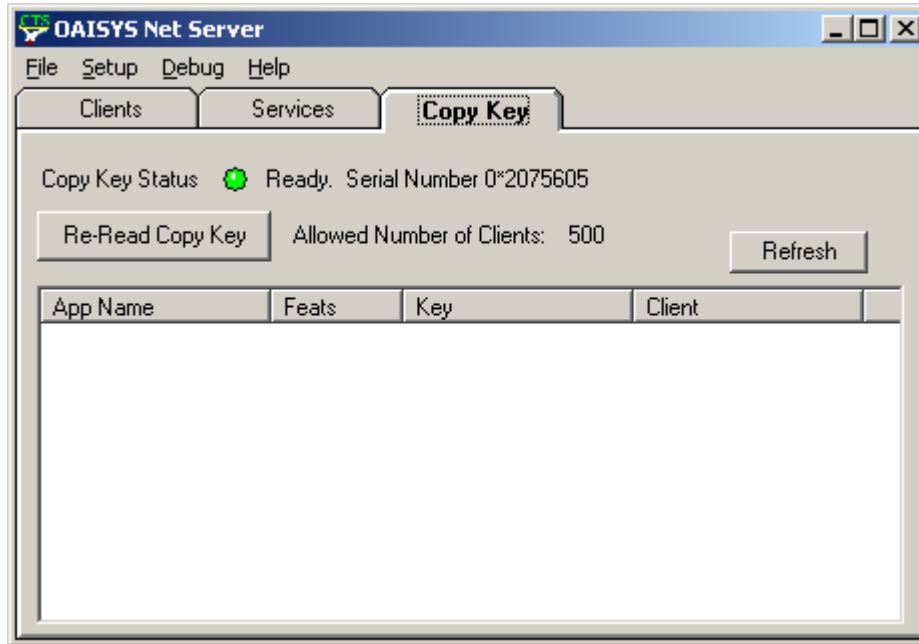
This is primarily used by technical personnel for monitoring the program activity.



## Copy Key

If **Copy Key Status** doesn't display a green light with a *Ready* status, then the copy key is not properly installed and operational (refer to the Troubleshooting section on page 9).

The information displayed in this area will show which applications are presently using the various feature units from the copy key. Normally this information is used by authorized personnel for troubleshooting.



*Note: See the **OAISYS Feature Points Explained** application note or Appendix D for more information on the Copy Key Service.*

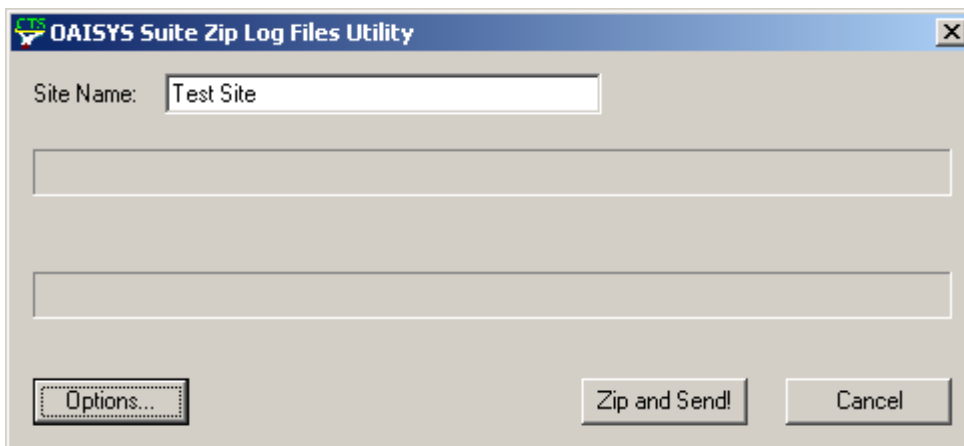
## Errors & Troubleshooting

### *Symptom: Copy Key Status displays “No Button Found”*

- **Copy Key Not Installed Properly** -- The copy key must be installed on the parallel printer port (LPT1) of the Net Server PC. The LPT port must be configured at I/O Address 378h and IRQ 7. See your PC documentation for instructions on changing the system BIOS.
- **Copy Key Not Functional** – If the copy key is not functioning correctly it may need to be replaced. To test the copy key, install it on a different PC, preferably from a different PC manufacturer. Install the *OAISYS Net Server* (without the *level2 Service* or *App Server-16*). Run *Net Server*, and check the copy key status. Most key problems are due to configuration problems with the physical LPT port.

## Zip Log Utility

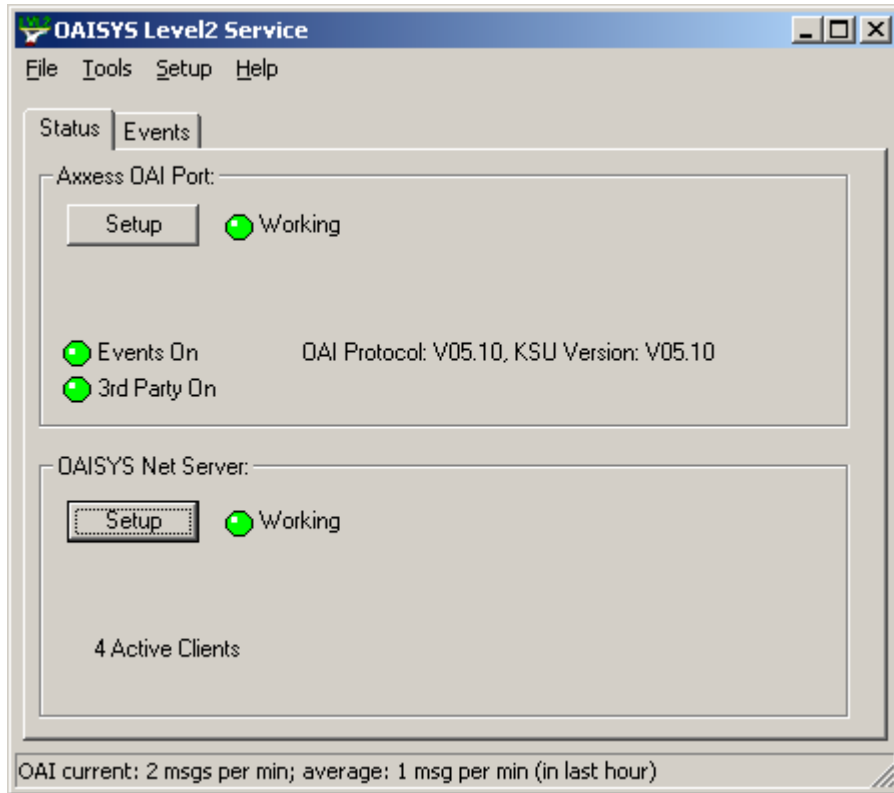
To assist technical support in troubleshooting problems, the OAISYS Net Server includes a utility that zips and automatically sends the OAISYS events to our FTP site. In order to run this utility, choose **Debug** and **Send Log Files** from the Main Menu of the OAISYS Net Server. Put in the Site Name and press Zip and Send! Please call your OAISYS Reseller so a ticket can be open with Technical Support.



*Note: The OAISYS Net Server will need permissions to write to an FTP site in order for the upload to complete. If the server doesn't have those permissions press **OPTIONS** and change the option to **Split Output into smaller files for E-mail** and then send the zipped files to your reseller.*

## Level2 Service

This sub-component, also referred to as *OAISYS Level2OAI Service*, is the service that interfaces to either the COM port that connects to the System OAI Level 2 port on the Axxess PBX or makes a TCP/IP connection via the network to the NTCPU, the CPC card or the CT Gateway. It allows multiple client applications to simultaneously share the use of this port.



The status line on the bottom of the *OAISYS Level2 Service* screen displays the average number of messages per minute and the average number of messages per minute in the last hour. This information is helpful for determining the level of system activity.

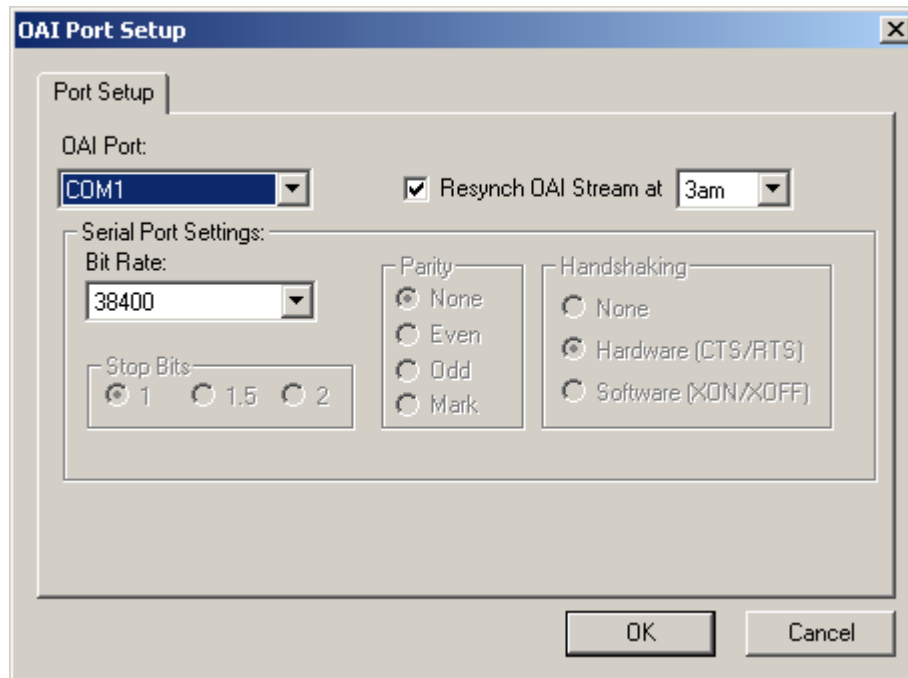
## Tab Choices

### Status

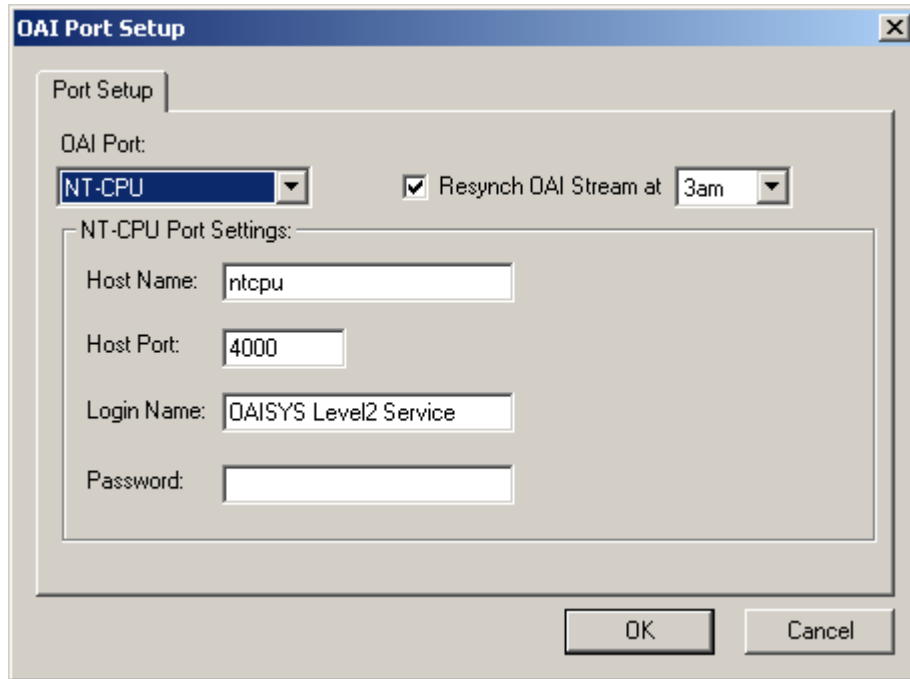
### Axxess OAI Port

If this section doesn't display a green light with a *Working* status you will likely need to setup the configuration that is being used to connect to the Axxess Phone System. Use the **Setup** button (or the menu **S**etup and then **Axxess OAI Port**) to setup the configuration.

1. COM port connection. Choose which COM port will be used from the drop down menu. 38400 should always be the bit rate speed.

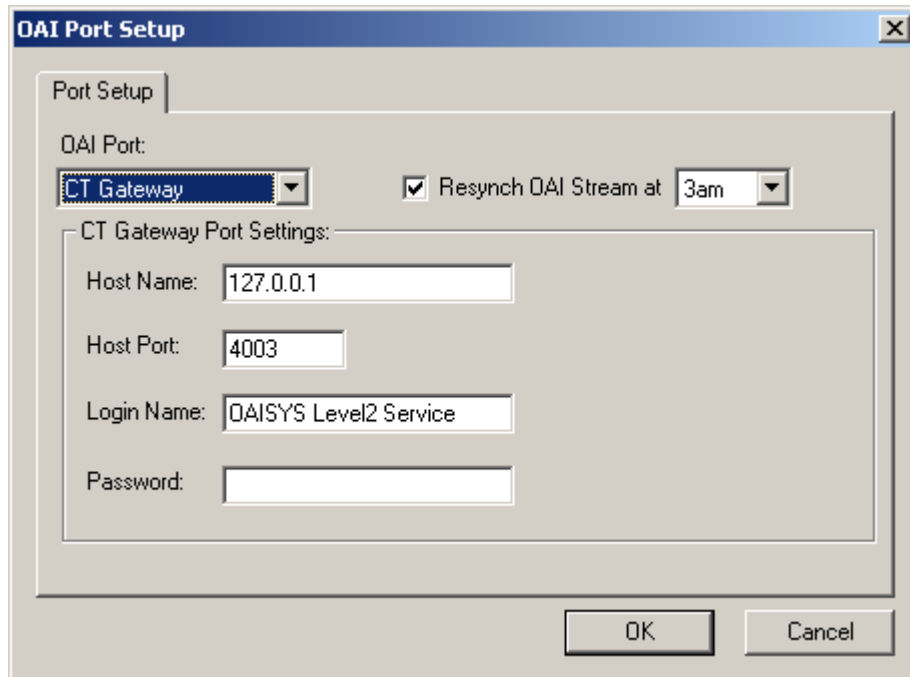


2. NT-CPU/CPC connection. Put in the host name or the IP address of the NT-CPU or CPC card.  
Make sure the host port matches. (*see the Application Note for more information*)



The screenshot shows the 'OAI Port Setup' dialog box with the 'Port Setup' tab selected. The 'OAI Port' dropdown menu is set to 'NT-CPU'. The 'Resynch OAI Stream at' checkbox is checked, and the time is set to '3am'. The 'NT-CPU Port Settings' section contains the following fields: 'Host Name' with the value 'ntcpu', 'Host Port' with the value '4000', 'Login Name' with the value 'OAISYS Level2 Service', and an empty 'Password' field. 'OK' and 'Cancel' buttons are at the bottom right.

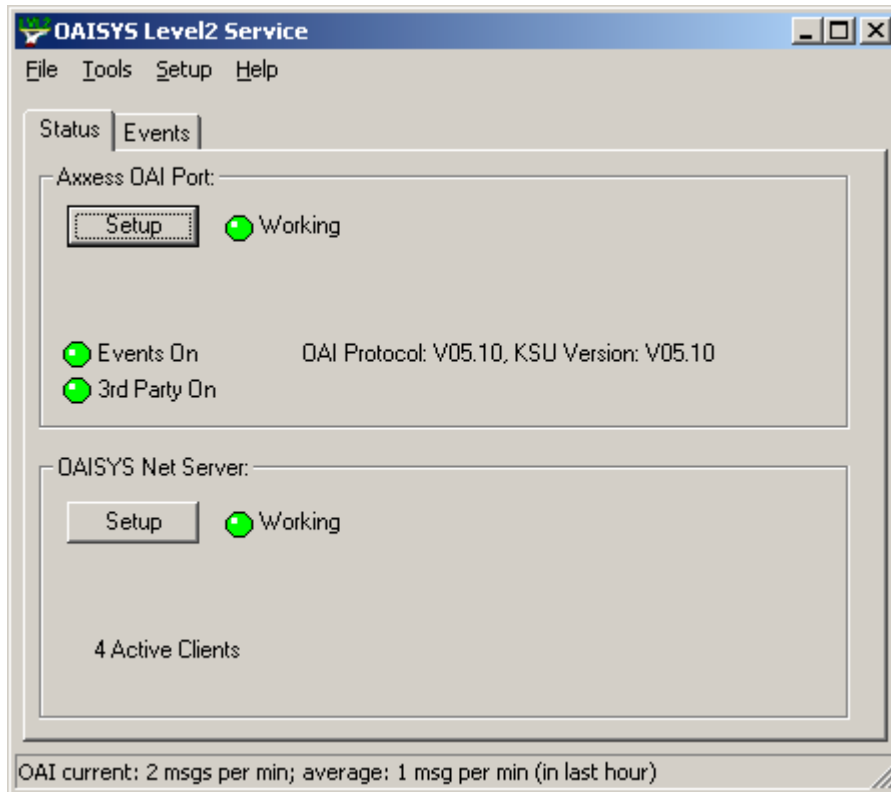
3. CT Gateway. Put in the host name or the IP address of the CT Gateway.  
Make sure the host port matches that of the Application Port setting in the CT Gateway.  
(*see the Application Note for more information*)



The screenshot shows the 'OAI Port Setup' dialog box with the 'Port Setup' tab selected. The 'OAI Port' dropdown menu is set to 'CT Gateway'. The 'Resynch OAI Stream at' checkbox is checked, and the time is set to '3am'. The 'CT Gateway Port Settings' section contains the following fields: 'Host Name' with the value '127.0.0.1', 'Host Port' with the value '4003', 'Login Name' with the value 'OAISYS Level2 Service', and an empty 'Password' field. 'OK' and 'Cancel' buttons are at the bottom right.

Once the port is setup correctly and is properly connected to the Axxess PBX system, you should see green light in the Axxess OAI port of the status section. If not, refer to the Troubleshooting section, page 16, for more instructions.

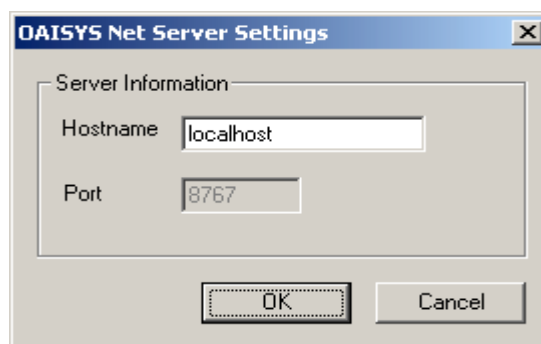
There are two lights below the **Setup** button. These lights indicate whether or not **System OAI Events** is enabled in the Phone System and whether or not **3<sup>rd</sup> Party Call Control** enabled in the Phone System. Green lights indicate they are enabled.



### ***OAISYS Net Server***

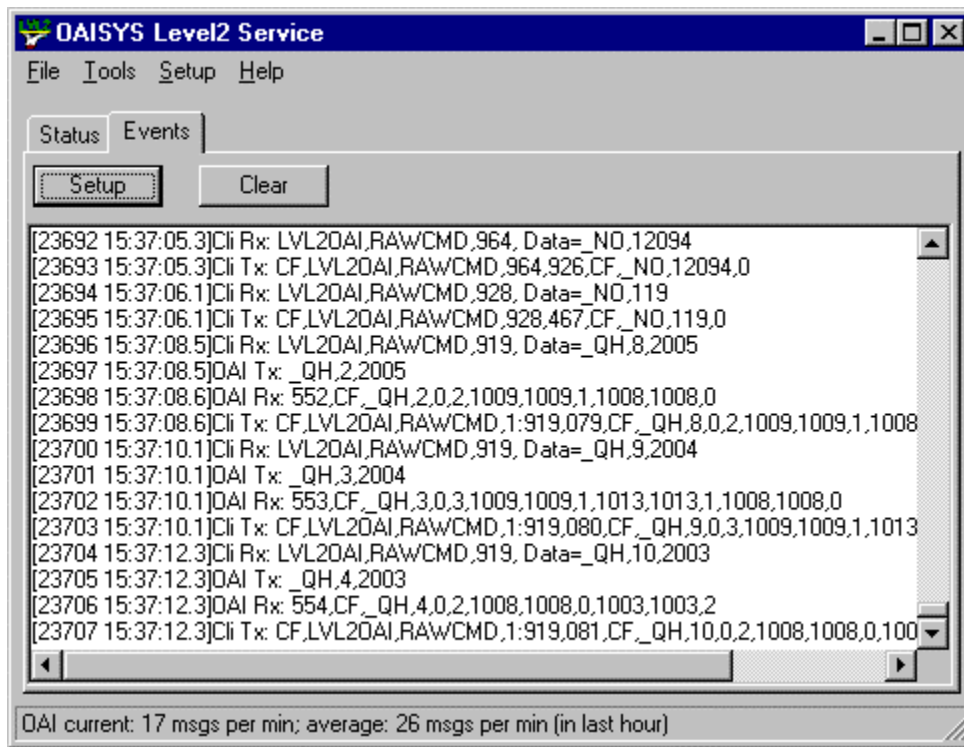
If this section doesn't display a green light with a *Working* status you will likely need to setup the configuration to *OAISYS Net Server*. To operate successfully, this program must be allowed to access *OAISYS Net Server* using a TCP/IP connection.

The default settings will work in most situations. If they do not, press the **Setup** button. The Hostname field should contain the network name (or IP address) of the Net Server PC. Some network software packages do not allow the use of the special Localhost name. You may need to use the Windows NetBIOS name (NetServer) or the full TCP/IP hostname (Netserver.mycompany.com).



## Events

This section provides a view of the detailed events of this service. Typically this is only used for troubleshooting.



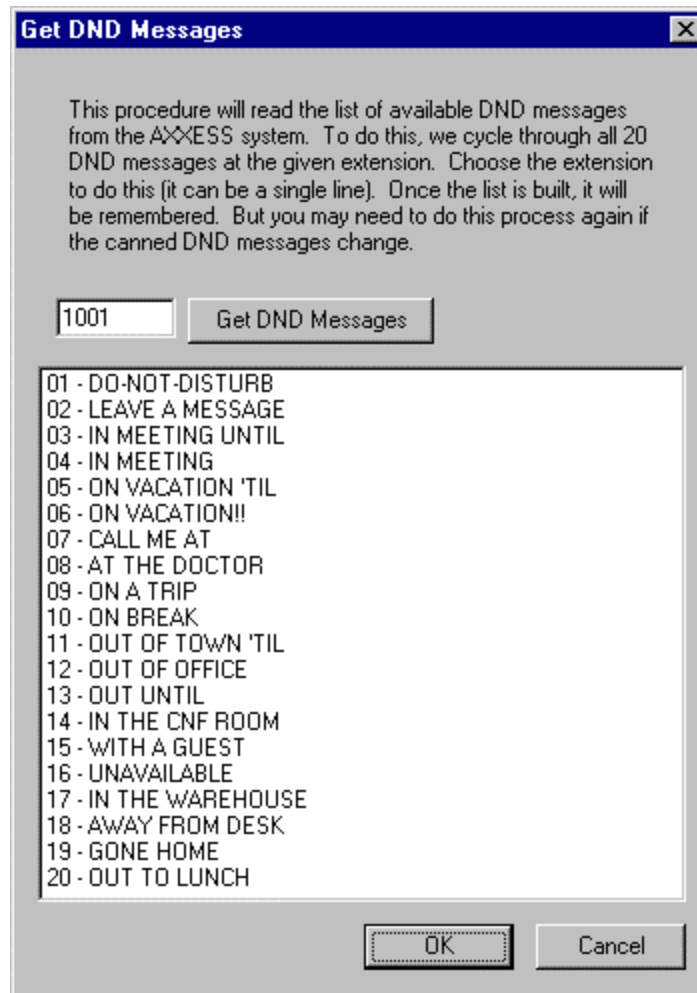
Note: Events are recorded to a disk file in the current directory so if a problem occurs, the events can be examined at a later time. The file name is Level2OAI\*.log. Use *Setup / Debug Output* to select which events are output to the log file.

## Menu Choices

### Setup

#### *Read DND Messages*

On software versions of Axxess prior to V5.0, the PBX DND messages were not automatically available to CTI applications. However, using this menu item you can read the DND messages from the switch manually. You will need to repeat this operation whenever the Axxess DND messages have been changed. A valid station extension must be entered to retrieve the DND messages. Ideally the extension should be idle.



## ***Errors & Troubleshooting***

### ***Symptom: Axxess OAI Port doesn't show Green Light***

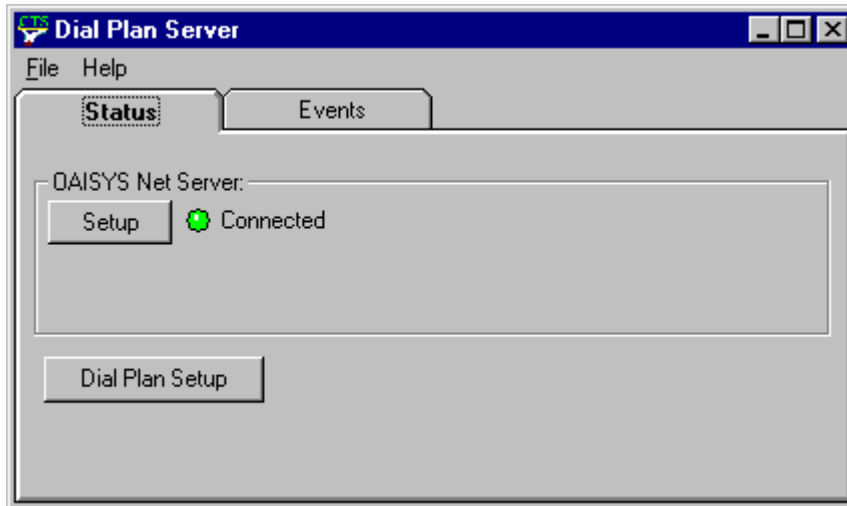
- **Wrong COM Port** – Make sure you have the correct PC COM port selected
- **Wrong COM Port Speed** – Do not use Axxess CPU port 3 because the speed is too slow. CPU Serial ports #1 and #2 support Autobaud and can be set at speeds greater than 9600. Typically you should use the fastest speed supported by the OAI port. We recommend Axxess CPU port 2 at 38400 baud.
- **Won't connect to CT Gateway** – If a node is lost from the CT Gateway and the software gets restarted the Application port doesn't open and the level2 connection will be lost. Delete the node from the CT gateway software and the connection will re-establish.
- **System-Level OAI is not Enabled on the PBX Serial Port** – check Axxess database programming in *Service / System Serial Port Assignment*. Make sure the correct CPU serial port is listed under **Level 2** in the **System OAI Ports** section.

### ***Symptom: OAISYS Net Server doesn't show Green Light***

- **Can't Connect to Server When using LocalHost** – some proxy installations interfere with name resolution. If this happens, change Localhost to be the NetBIOS name of the Server PC. This name can be found by right-clicking **Network Neighborhood**, selecting *Properties*, and clicking the **Identification** Tab.
- **Invalid Software License** -- The server requires an appropriate software license to be available for its use on *OAISYS Net Server*. If an insufficient software license is available, this software will not operate.
- **Demo Mode** – Level 2 will operate in demo mode for 1 hour if it doesn't find a valid license key. The LED will be yellow and display *Demo Mode*. After one hour expires, the service will stop.

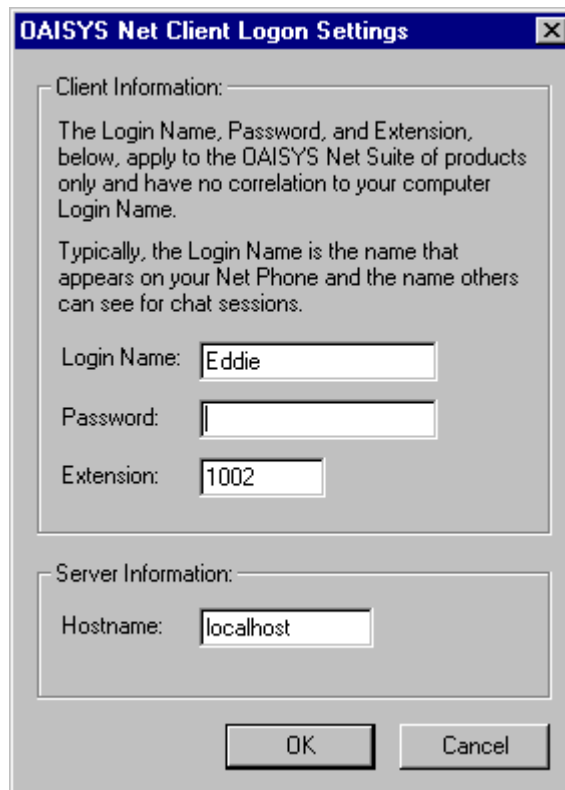
## Dial Plan Server

The *Dial Plan Server* program is automatically launched when *Net Server* is opened. The **Connected** status will display a green light if *Net Server* is running properly. *Dial Plan Server* allows a centralized dialing plan to be created and maintained on the server, and to be used by many desktop clients (like *OAISYS Net Phones*) and system applications (like *Voice Assistant*).



### Status

### Setup



## Client Information

**LoginName:** Enter a unique Login Name for the PC user.

**Password:** Enter the password for the PC user (optional).

**Extension:** (optional)

## Server Information

**Hostname:** Enter the OAISYS Net Server PC name or IP address.

## Dial Plan Setup

### Calling Within My Home Area Code:

**My Home Area Code is:** Enter your local area code.

#### Local Calls

**All Calls in my Area Code:** Select this option if all calls in this area code are local calls.

**Calls to These Office Codes:** Select this option if all calls to the home area code are not local calls and you wish to set up specific Office Codes for the local area code.

**Dial Area Code on All Local Calls:** Enter a checkmark in this box if you wish to dial the local area code before all local calls.

**Long Distance Calls**

**For Long Distance Calls add + 1:** Enter a checkmark in this box to dial a 1 in front of all local calls (calls within the Home Area Code) that are considered long distance.

**Calling Outside the Home Area Code:****Local Calls**

**None:** Select this option if there are no local calls outside of your area code.

**Only Calls to These Area+Office Codes:** Select this option if there are area codes in addition to your home area code that are not long distance calls. For example, Phoenix, AZ has three area codes. Any call to one of the three area codes is considered a local call. After selecting this option, click on the C to change the Local Area + Office Codes.

**Long Distance Calls**

**For Long Distance Calls add + 1:** Enter a checkmark in this box to dial a 1 in front of all long distance calls.

**Test a Phone Number**

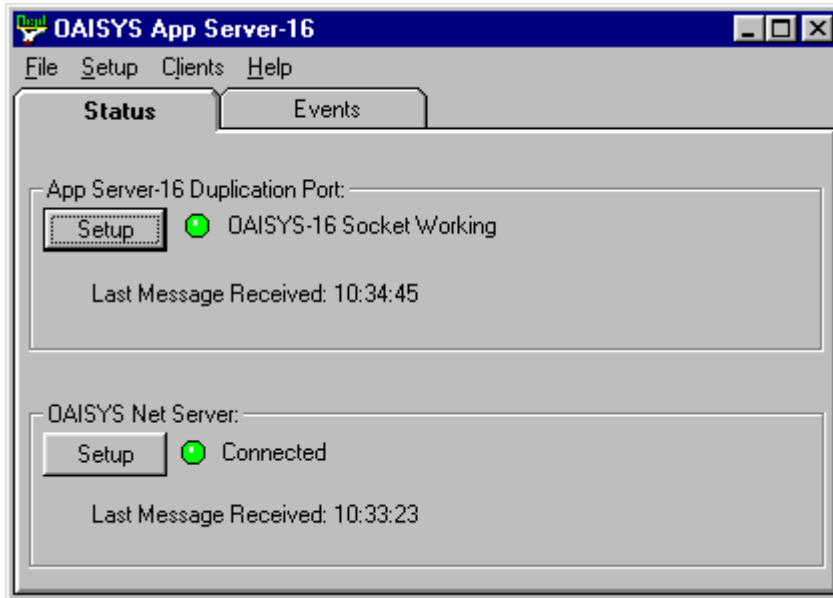
Enter a test number, then press **Check**. This displays the number dialed and what type of call it is.

**Events**

This is a screen that can be used to capture events. Typically this is only used for troubleshooting.

## OAISYS App Server-16

This is a client program of *OAISYS Net Server* and it is used to simulate the functions of *OAISYS Server* to all OAISYS applications previous to version 3.0 (such as *Park & Page*, *ACD Manager*, *Auto Call Record*). Though this program is typically installed on the same PC as *Net Server*, it can also be installed on a different PC on the LAN thereby allowing the OAISYS applications to be installed and run on a different PC from *Net Server*.



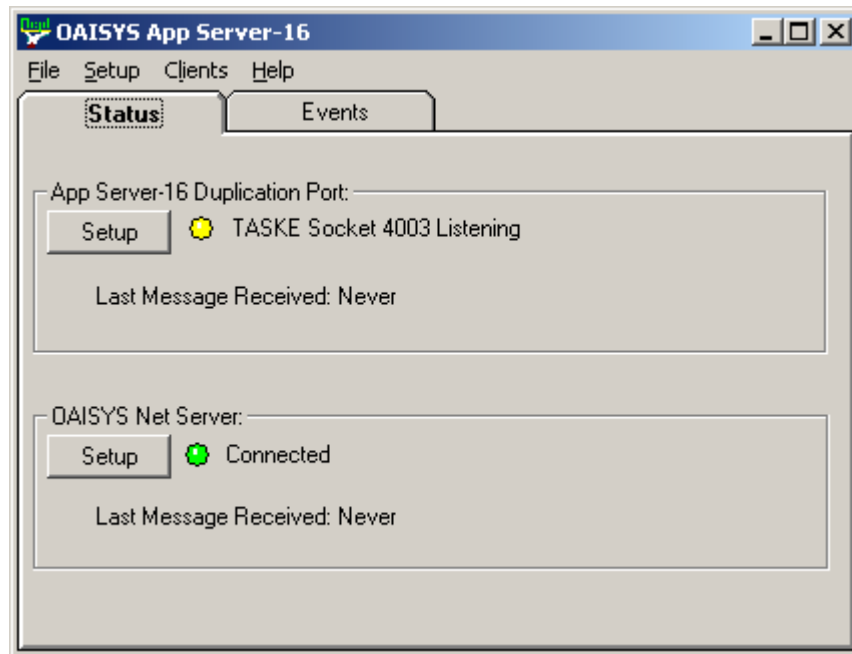
## Tab Choices

### Status

*App Server-16 (see Appendix A for connecting App Server 16 to older versions)*

### TASKE

For some application integrations, such as TASKE Contact, *AppServer-16* is used to simulate a unifier connection to the PBX.



### OAISYS Net Server

If this section doesn't display a green light with a *Working* status you will need to setup the configuration to *OAISYS Net Server*. To operate successfully, this program must be allowed to access *OAISYS Net Server* using a TCP/IP connection.

If installed on the same PC as *OAISYS Net Server*, the default server settings will likely be okay, but if not you can change them using the **Setup** button to select and setup the server shown below. You should only need to change the **Hostname** field.

**Note:** In some installations the default hostname of Localhost may not work, in which case you should just use the NetBIOS name of the server.

If the program is NOT installed on the same PC as *OAISYS Net Server*, then you will need to change the **Hostname** field to be that of the name of the OAISYS Net Server PC.

## ***Errors & Troubleshooting***

### ***Symptom: AppServer16 Port doesn't show Green Light***

- **TASKE Socket 4003 listening (yellow light):** This is OK. The program is waiting for a Unifier application (most likely TASKE) to connect. TASKE is not configured correctly. Check the port on the Information server and make sure it is set to 4003 also.

### ***Symptom: OAISYS Net Server doesn't show Green Light***

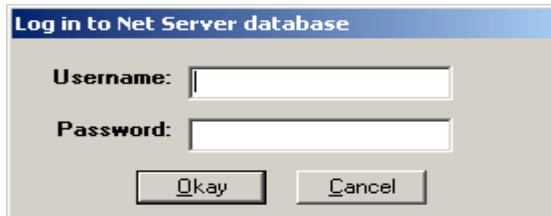
- **Can't Connect to Server When using "LocalHost"** – some proxy installations interfere with name resolution. If this happens, change Localhost to be the NetBIOS name of the Server PC. This name can be found by right-clicking **Network Neighborhood**, selecting *Properties*, and clicking the **Identification** Tab.
- **Invalid Software License** -- The server requires an appropriate software license to be available for its use on *OAISYS Net Server*. If insufficient software license is available, this software will not operate.
- **Unable to connect to Service U- Unknown Service** – *Axxess Level2 OAI Service* must be installed and operational for this program to work. See page 16 for troubleshooting *Axxess OAI Service*.

## OAISYS Net Server Administrator

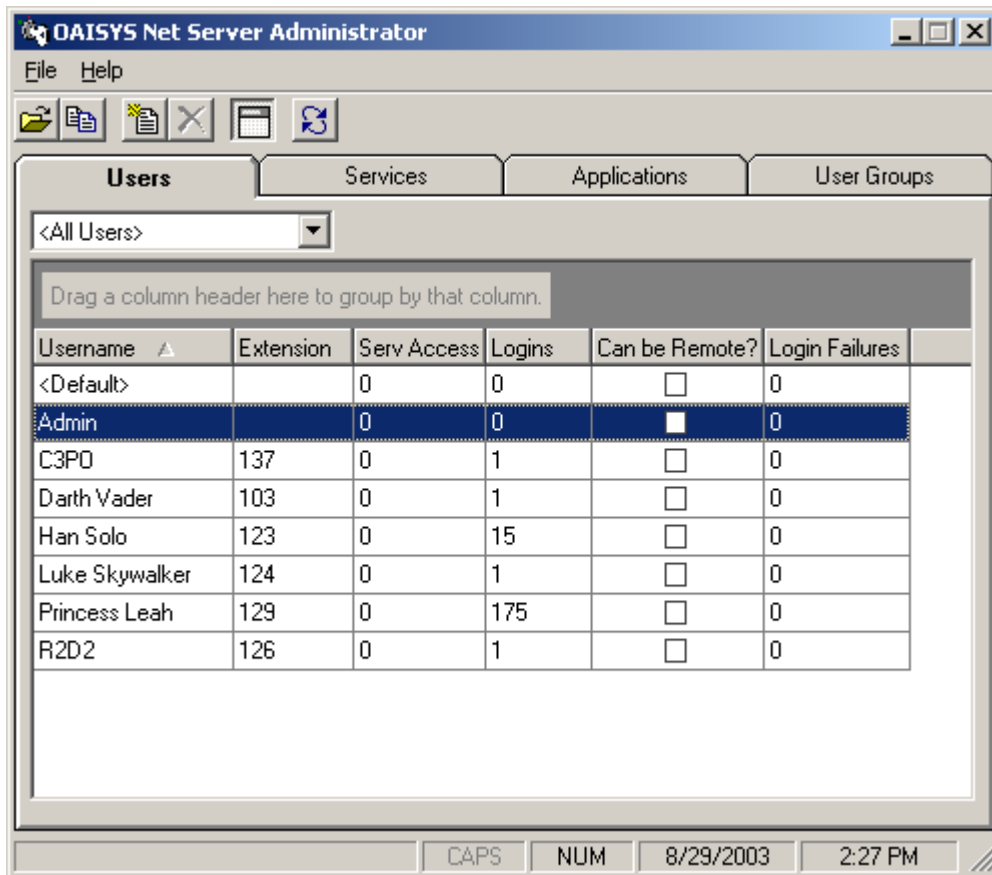
This program is used to setup and control which client programs have access to *Net Server*.

To access the database containing the settings you must first open the database (by pressing the **Open** button) and then log on with a valid username and password. The default access username and password is:

Username: **Admin**      Password: **Admin**



Once you've successfully logged on, you should see a screen similar to the one shown below:



## Users (Clients)

The users section defines which clients will have access to the server and what server services they can reach. A client actually defines a user and each program must log in to *Net Server* using one of these user accounts.

**Note:** It is certainly possible (even typical) that multiple programs can login using the same user account.

- **Username** -- User's login name. This must be unique.
- **Password** – (Optional) This is the password the client will use to log in. It protects against unauthorized use of this client account. Though it is possible to use no password (leaving this field blank), it is highly recommended that this be set to some value (characters and/or numbers).
- **Extension** –(Optional) This is the PBX extension number for this client. It must be provided if the client is allowed to control a phone extension. No two clients can have the same extension number (unless the extension field is blank).
- **Serv Access** -- This is a number that determines which services the client has access to. Each service has a Service Level number, and a client will have access to all services whose Service Level is less than or equal to the client's service level access number.
- **Logins** -- This is simply a count of the number of successful logins that have occurred by this client.
- **Login Failures** – This is a simply a count of the number for login failures.
- **Last Login Failed on** – This is a date and time of the last login failure.
- **Change Password** – Use this to force the user to change the password upon logging in.
- **Allow to be Remote** – Check this box to allow the user to connect externally. This option is only used if you have a Net Phone client trying to connect from outside the firewall.
- **User Belongs to These Groups** – Select which groups the client belongs to. See App Note.

**Edit User**

Username: Luke Skywalker

Password: xxxxx

Extension: 124

Srvc Access: 0    Logins: 1

Consecutive Login Failures: 0

Login Failures: 0

Last Login Failed On: 01/01/02 00:00

User Belongs to These Groups:

- NetPhoneAdmin
- NetPhoneUsers
- Jedi Knight

Change Password

Allow to be Remote

New Group...

Done    Cancel

## Services

The services section defines which services are on the server and what clients can use them. Services are typically created automatically when they are installed so this is mainly used for viewing the configuration of services.

- **Serv. Level** -- This is a number that determines which clients can access this service. Each client has a service level access number, and a client will have access to all services whose Service Level is less than or equal to the client's service level access number.
- **Name** -- Service name. This must be unique.
- **Password** -- This is the password the service will use to login. This should typically never be changed.
- **PathName** -- This is the path and filename for the service. This should typically never be changed.
- **Description** -- This is the description of the service. This should typically never be changed.
- **StartupParms** -- This field contains startup parameters that will be passed to the service upon starting it up (if AutoStart is enabled). This should typically never be changed.
- **AutoStart** -- This determines whether the service will be automatically started whenever *Net Server* starts.
- **AutoHide** -- This determines whether the icon for the service will automatically be hidden after *Net Server* starts.
- **AutoStop** -- This determines whether the service will be automatically stopped when the Net Server shuts down.
- **Start As NT Service** -- This determines if the service will started as an NT Service. (not currently operational)

To Add or Edit a service, click on the **Add** or **Edit** button and the following screen will appear:

The screenshot shows a dialog box titled "Edit Service". It contains the following fields and options:

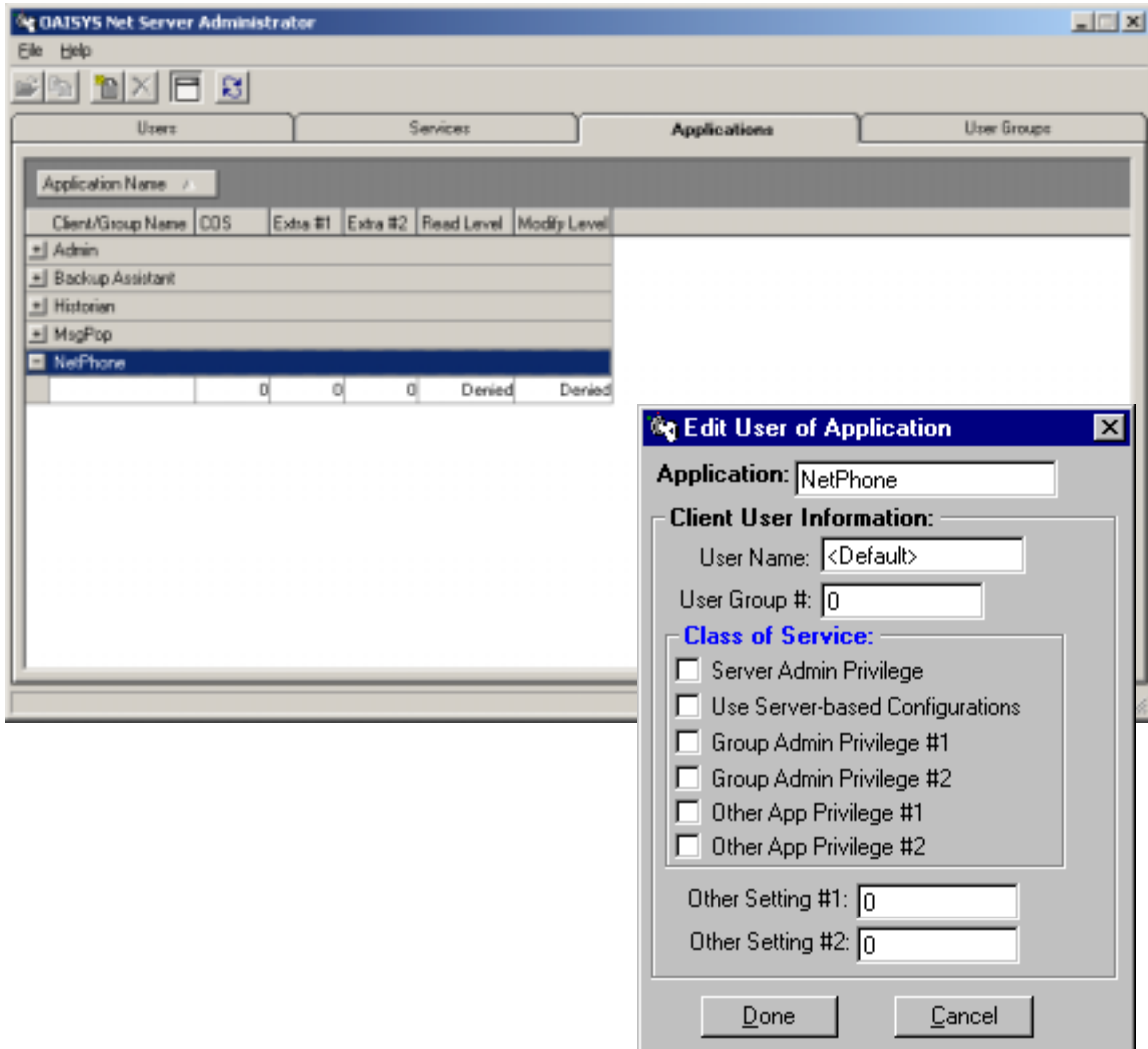
- Service Information:**
  - Name: AppServer16
  - Password: [empty]
  - PathName: C:\Program Files\CTS\NetServer\AppServer.exe
  - Description: App Server 16
  - Startup Parms: [empty]
- AutoStart:
- AutoStop:
- AutoHide:
- Start As NT Service:
- Service Level: 0

Buttons: Done, Cancel

To delete a service, highlight the service in the main services window and click on the **Delete** button. A confirmation box will appear, asking you if you want to delete the service.

## Applications (Application Users)

The Application section allows you to define users for various applications. Some applications (such as *OAISYS Net Phone* and *Group DSS*) can make use of this so you can define a User Group and various Privileges for each user of an application.



- **Application** -- This is the name of the Application for which the User is defined.
- **User Name** -- This is the client name of the user (see Clients). However by setting this to <Default> (or leaving it blank) you will define the settings for the Default User. This is very useful because you can set the behavior for all typical users by creating a Default User, and then you only need to add any additional clients that need settings other than those of the Default User.
- **User Group #** -- Each user can be assigned to a group by setting this number (application may use this to standardize settings/features for each group)
- **Class of Service:** -- These options are used to control the user access privileges.  
**Note:** Each application may (or may not) use these settings so you must refer to the individual applications for information on if and how they use these settings.
  - **Server Admin Privilege** -- Enables the user to do administration of server configuration files
- **Use Server-Based Configurations** -- When enabled this user will get his/her program configuration settings from the server in this application's folder (see below). If this is disabled, the user will get configuration settings from his/her local PC.
- **Group Admin Privileges** -- Determines if this user can perform functions for the group (unique to each application).
- **Other App Privileges** -- Determines if this user can perform other functions (unique to each application)
- **Other Setting #1** -- This is potentially used by the application for other purposes (unique to each application)
- **Other Setting #2** -- This is potentially used by the application for other purposes (unique to each application)

**Application Configuration File** -- The server keeps each application's configuration files in a separate folder on the server. The folder is named the same as the application (i.e. *NetPhone*).

*See the **Net Phone Server Configuration Application Note** or **Appendix B** for specifics on setting up Net Phone User Groups.*

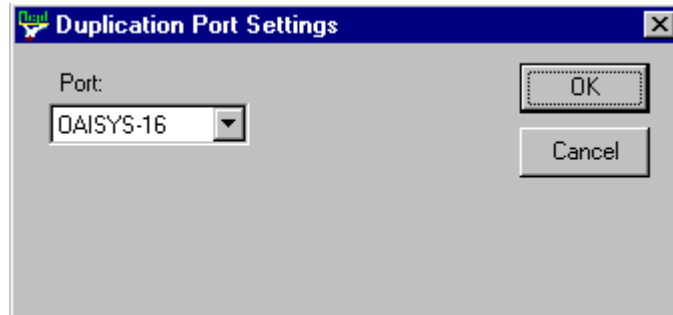
*See the **Replay Users Application Note** or **Appendix C** for specifics on setting up Users for Replay.*

## Appendix A

### Using App Server 16 to connect to older versions of OAISYS

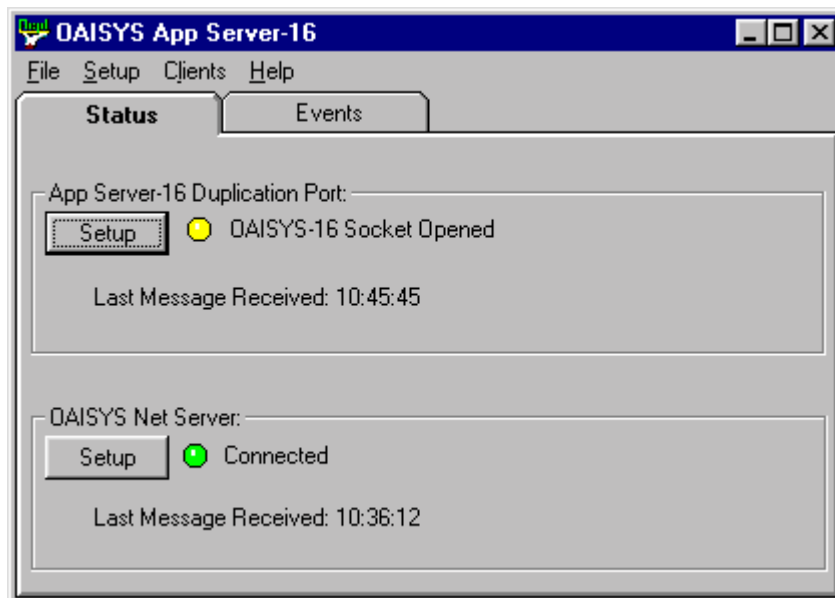
#### Duplication Port

If this section doesn't display a green (or yellow) light with an *Opened* or *Working* status you will need to configure the port being used to connect to the Axxess System-Level OAI port. Use the **Setup** button to access the setup screen shown below.



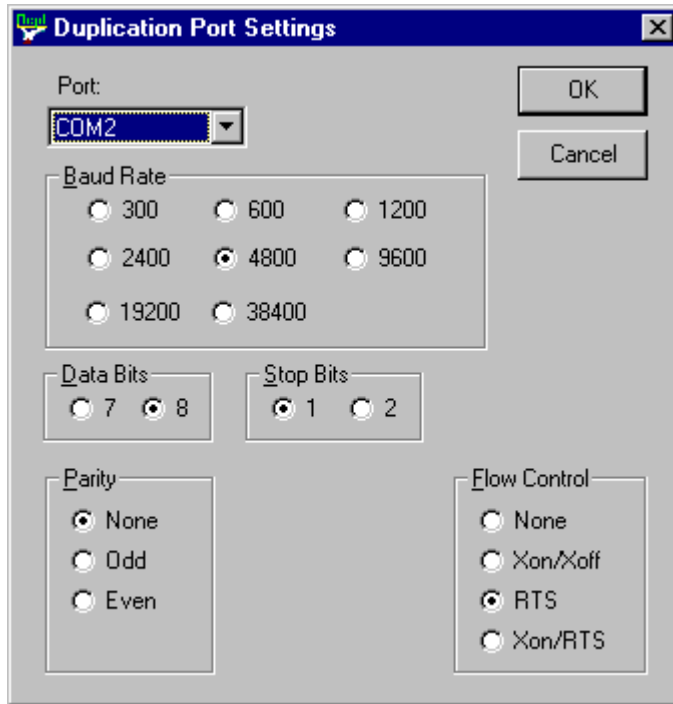
#### OAISYS-16

When using this program to serve existing 16-bit OAISYS applications, the Port setting should be set to **OAISYS-16**. When starting up it will show a yellow light and a status of *OAISYS-16 Socket Opened* (as shown below) until an OAISYS application begins communication with it, and then it will switch to a green light and a status of *OAISYS-16 Socket Working*.



## COM

In special application scenarios *App Server-16* can be set to serve a physical COM port to replicate the function of the System OAI port. Another PC can be connected to the COM port specified and receive OAI events as if it were connected to the PBX.

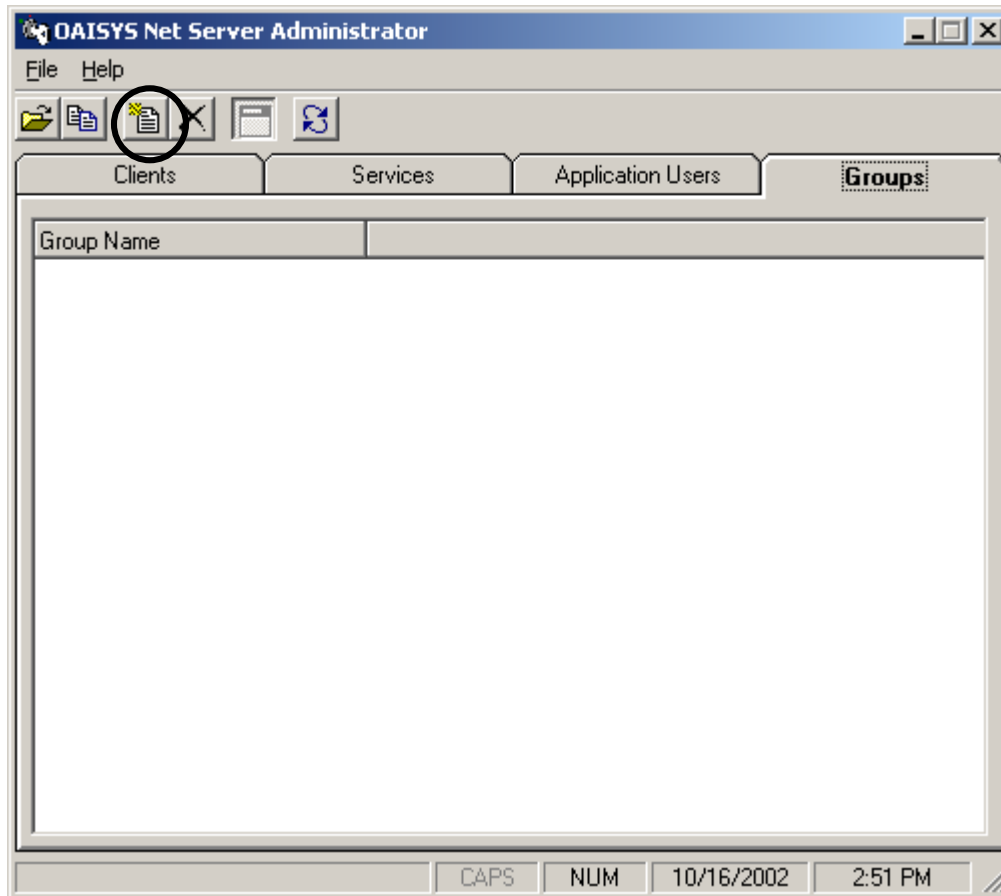


## *Appendix B*

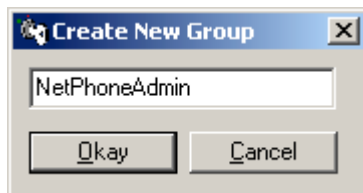
### *Net Phone Server Configuration*

#### **Net Server Administrator - Groups**

Open Net Server Administrator by selecting **Setup\Administration** from within Net Server. Log in with username **admin** and password **admin**. Select the **Groups** tab. Click the **Add New Record** button.

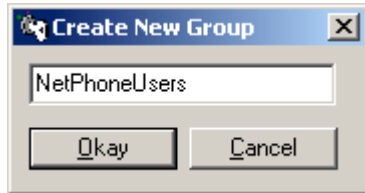


Type in a name to represent the Net Phone Administrator (**NetPhoneAdmin** in this example) and click **Okay**.

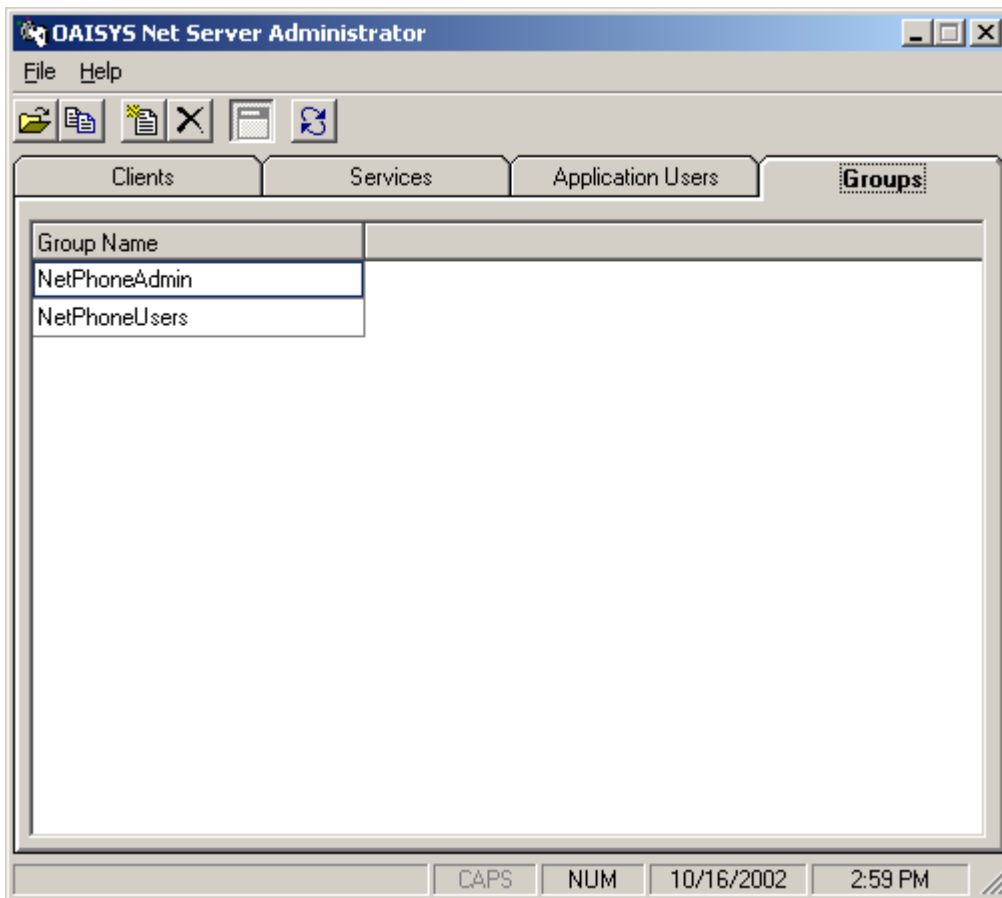


### Net Server Administrator – Groups (cont.)

Click the **Add New Record** button again, and this time, type in a name to represent the Net Phone Users' group (**NetPhoneUsers** in this example) then click **Okay**.

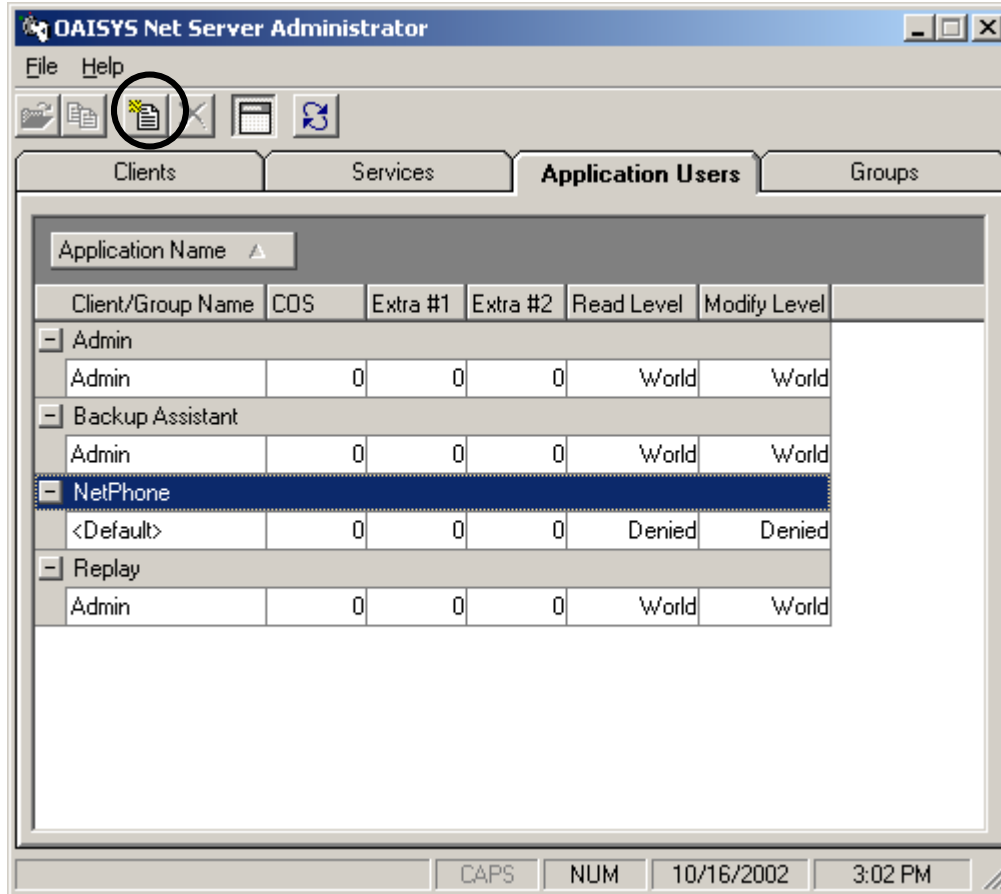


Repeat the above steps to create any other Net Phone user groups. Net Server Admin should now look like this:



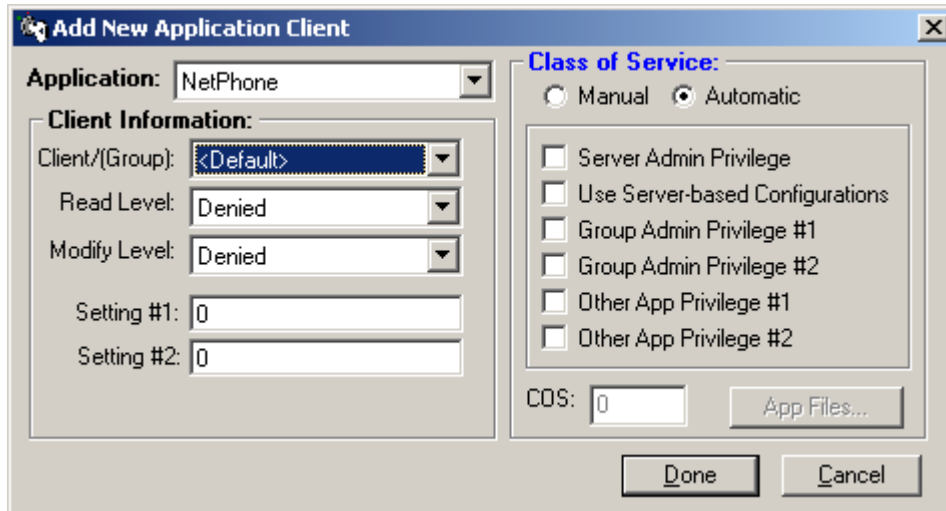
## Net Server Administrator – Application Users

Select the **Application (Users)** tab. Highlight the **NetPhone** entry and click **Add New Record**.



## Net Server Administrator – Application (Users) (cont.)

The following window should pop up:



**Add New Application Client**

**Application:** NetPhone

**Client Information:**

Client/(Group): <Default>

Read Level: Denied

Modify Level: Denied

Setting #1: 0

Setting #2: 0

**Class of Service:**

Manual  Automatic

Server Admin Privilege

Use Server-based Configurations

Group Admin Privilege #1

Group Admin Privilege #2

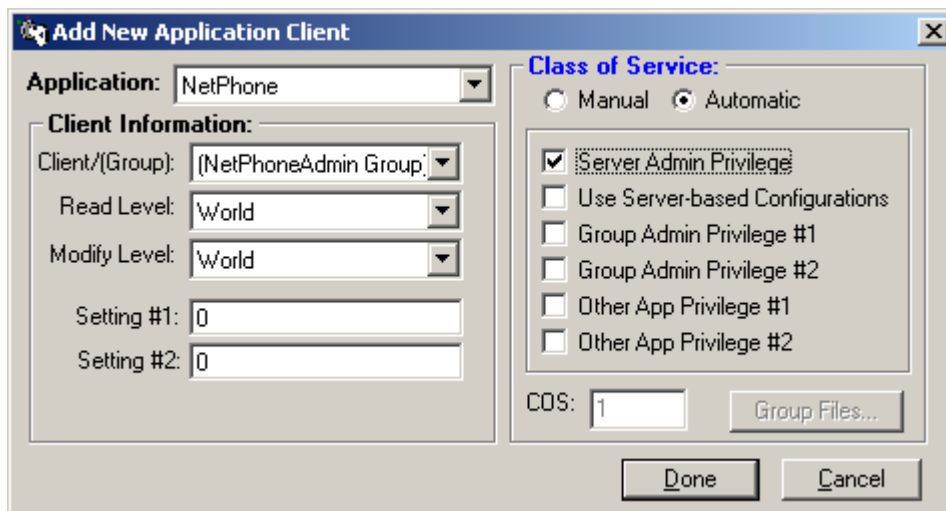
Other App Privilege #1

Other App Privilege #2

COS: 0 App Files...

Done Cancel

Select the newly created Net Phone Administrators group from the **Client/(Group)** drop-down box. Select **World** for both **Read Level** and **Modify level** from their respective drop-down boxes. Place a checkmark in the **Server Admin Privilege** checkbox. The window should now look like this:



**Add New Application Client**

**Application:** NetPhone

**Client Information:**

Client/(Group): (NetPhoneAdmin Group)

Read Level: World

Modify Level: World

Setting #1: 0

Setting #2: 0

**Class of Service:**

Manual  Automatic

Server Admin Privilege

Use Server-based Configurations

Group Admin Privilege #1

Group Admin Privilege #2

Other App Privilege #1

Other App Privilege #2

COS: 1 Group Files...

Done Cancel

Click **Done**.

### **Net Server Administrator – Application (Users) (cont.)**

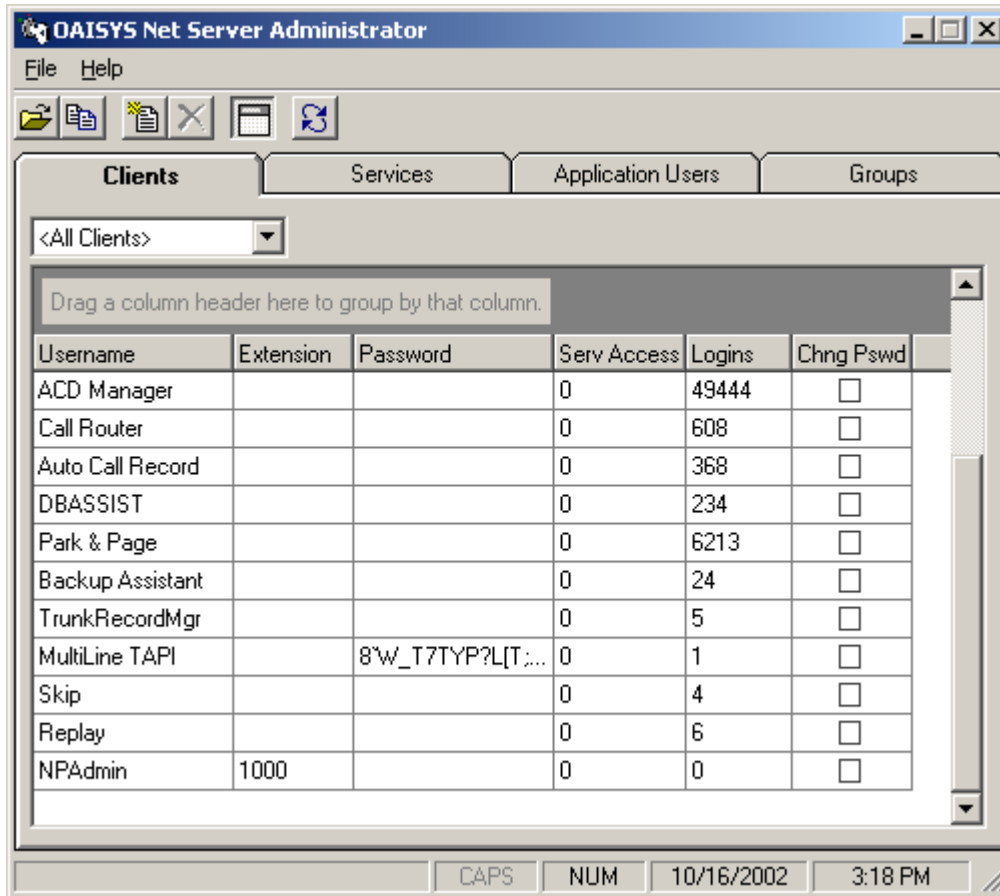
Highlight the **NetPhone** entry again and click the **Add New Record** button. Select the Net Phone Users group created on page two from the **Client/(Group)** drop-down box. Select **Denied** for both **Read Level** and **Modify Level** from their respective drop-down boxes. Uncheck the **Server Admin Privilege** checkbox. Place a checkmark in the **User Server-based Configurations** checkbox. The window should now look like this:

The screenshot shows the 'Add New Application Client' dialog box. The 'Application' dropdown is set to 'NetPhone'. Under 'Client Information', 'Client/(Group)' is '(NetPhoneUsers Group)', 'Read Level' is 'Denied', and 'Modify Level' is 'Denied'. 'Setting #1' and 'Setting #2' are both '0'. Under 'Class of Service', 'Automatic' is selected. The 'Server Admin Privilege' checkbox is unchecked, and 'Use Server-based Configurations' is checked. Other checkboxes for 'Group Admin Privilege #1', 'Group Admin Privilege #2', 'Other App Privilege #1', and 'Other App Privilege #2' are unchecked. The 'COS' field is '2' and there is a 'Group Files...' button. 'Done' and 'Cancel' buttons are at the bottom.

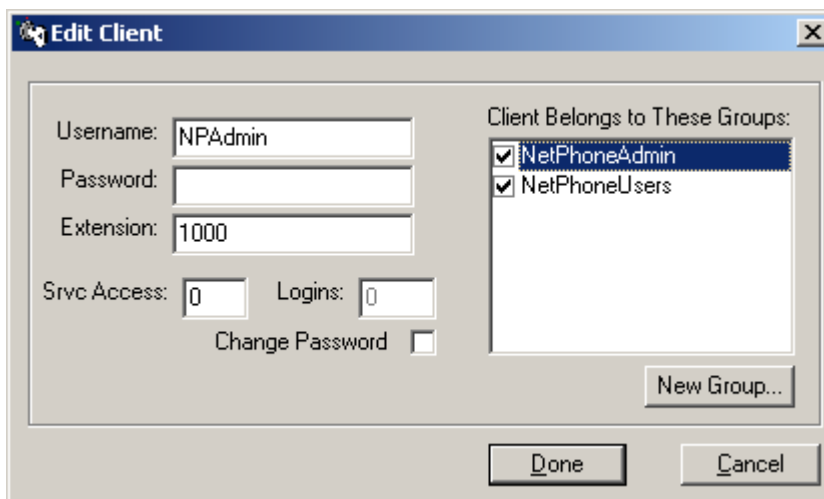
Click **Done**. Repeat the preceding steps to add any remaining Net Phone user groups created on page three.

### Net Server Administrator – Users (Clients)

Select the Users (Clients) tab. The following screen appears:



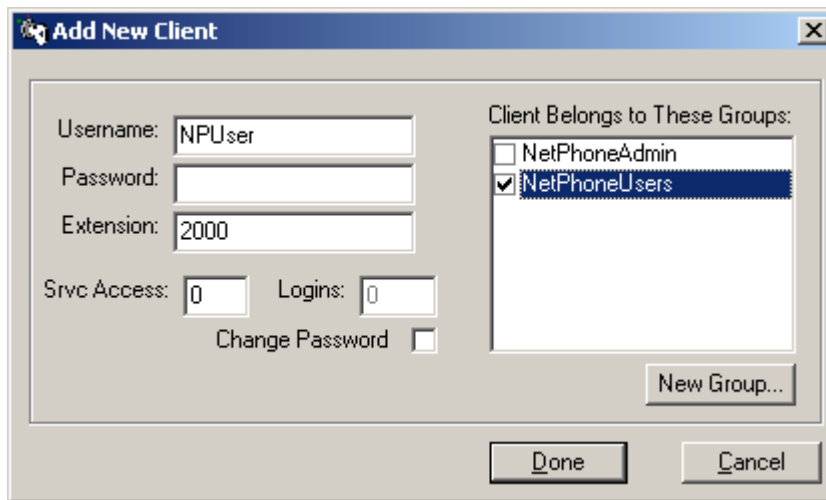
Double-click on the Administrator’s Net Phone entry (**NPAdmin – 1000** in this example.) Place a checkmark in every available group as is shown in the following screen-shot:



### ***Net Server Administrator – Users (Clients) (cont.)***

Click **Done**. This Net Phone extension, once configured, will serve as the model for all Net Phone users who are members of the Net Phone Users group.

Double-click on each Net Phone user's entry and place a checkmark in the Net Phone Users group checkbox as is shown on the following screen-shot:



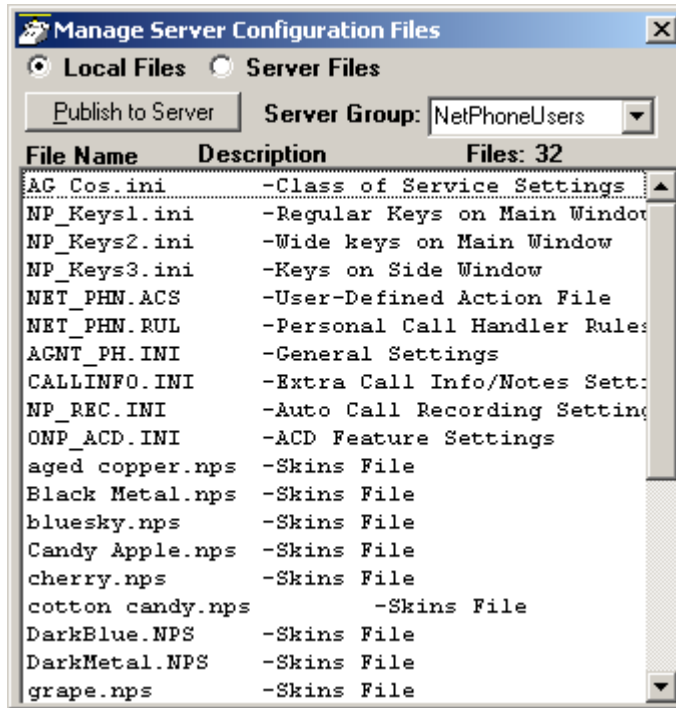
Click **Done**. Repeat the preceding step to add each Net Phone user to the Net Phone users group. Once finished, close Net Server Administrator.

### ***Net Phone Configuration***

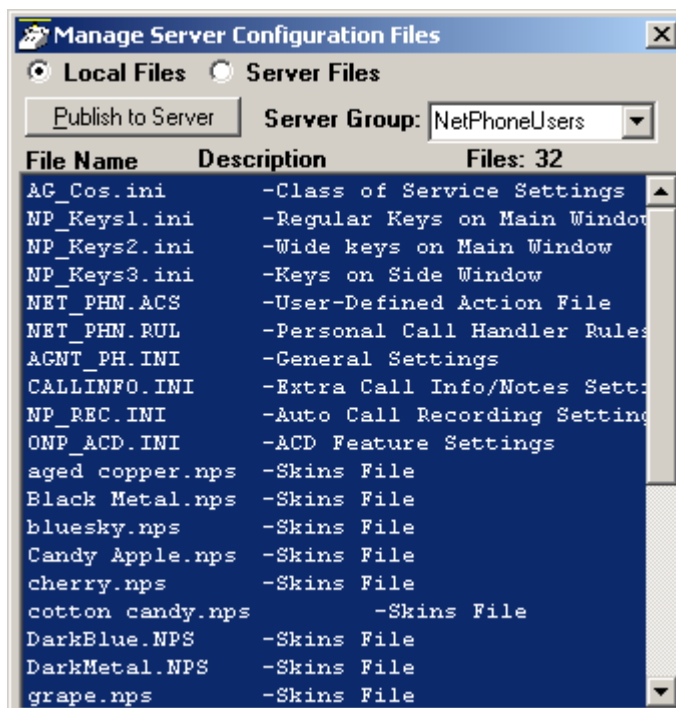
Restart the Administrator's Net Phone. Set up the buttons, Call Handler rules, skins, etc. as you would like the users' Net Phones to be configured.

### Net Phone Configuration (cont.)

Click the icon at the top-left of Net Phone and select **File\Publish**. The following window appears:



Select the Net Phone Users from the **Server Group** drop-down box. From the file list, highlight the files you would like to apply to the users' Net Phones (**ag\_cos.ini MUST be selected.**)



### ***Net Phone Configuration (cont.)***

Click **Publish to Server**. This action will place the selected files in the Net Phone Users group on the OAISYS server.

Click **Ok** and close the Manage Server Configuration Files window.

### ***Verification***

Restart a user's Net Phone. If you have included the button files in this configuration, verify that the user does not have the ability to change the buttons' features. If you have included Call Handler rules in the configuration, verify that the user's Call Handler has the appropriate rules set up. If anything else was included in the configuration, check those settings as well.

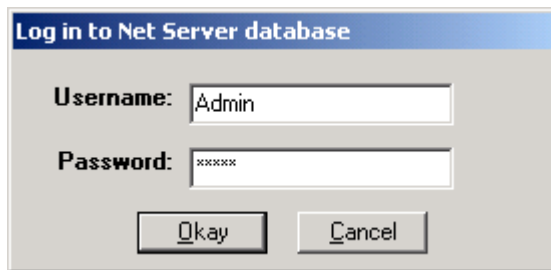
## *Appendix C*

### *Replay Users*

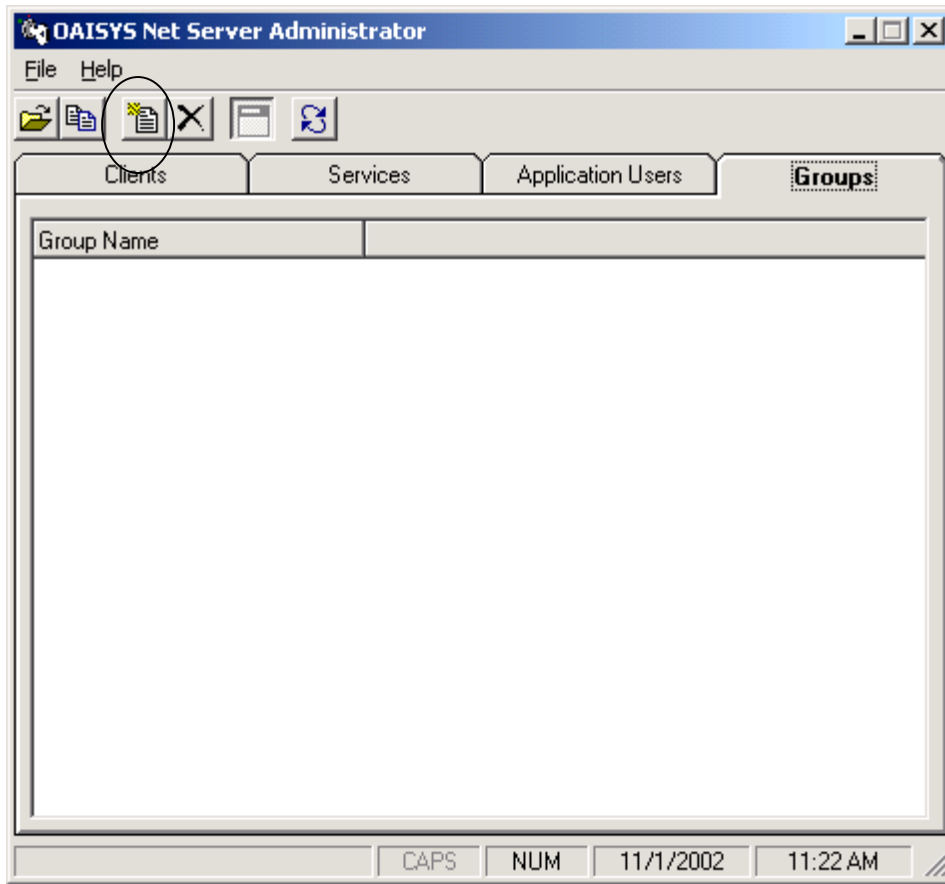
#### **Configuration of Net Server Administrator**

##### **Open the Net Server Administrator:**

1. From Net Server click on the Setup menu; then Administration  
OR  
From Start menu/Program files/OAISYS/Net Server Administrator
2. Login as **Admin** for username and **Admin** for Password



3. From the **Groups** tab click on the **Add new record** icon and define a group.



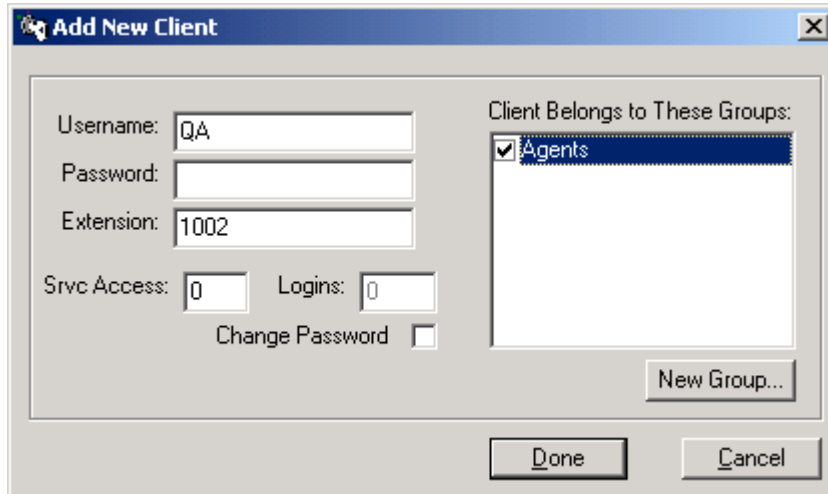
This example will be *Agents*.



- Next, click on the **Users (Clients)** tab of the Net Server Administrator.

Click on the **Add new record** icon and define the users for the group(s) that were just created.

In this example we defined the user as QA at extension 1002. Be sure to put a check mark in the box which makes them a member of the Agents Group



The screenshot shows the 'Add New Client' dialog box. It has a title bar with a close button. The main area contains several input fields: 'Username' with 'QA', 'Password' (empty), 'Extension' with '1002', 'Svc Access' with '0', and 'Logins' with '0'. There is a 'Change Password' checkbox which is unchecked. To the right, there is a list box titled 'Client Belongs to These Groups:' containing 'Agents' with a checkmark. At the bottom right of the main area is a 'New Group...' button. At the bottom of the dialog are 'Done' and 'Cancel' buttons.

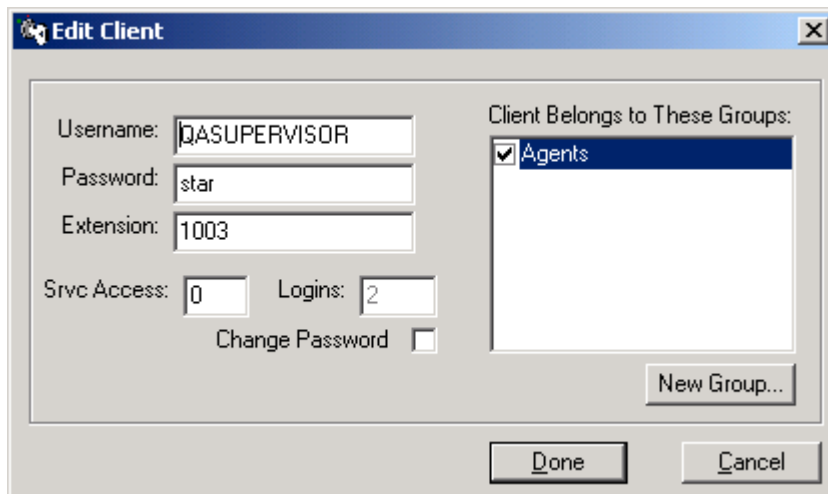
You need to add all the extensions that a supervisor or Replay user would want to have access to.

Also add the extension(s) and user(s) of the person(s) using Replay to view the calls. In this example username QASUPERVISOR was added.

(They will be given the access to replay in the next page)

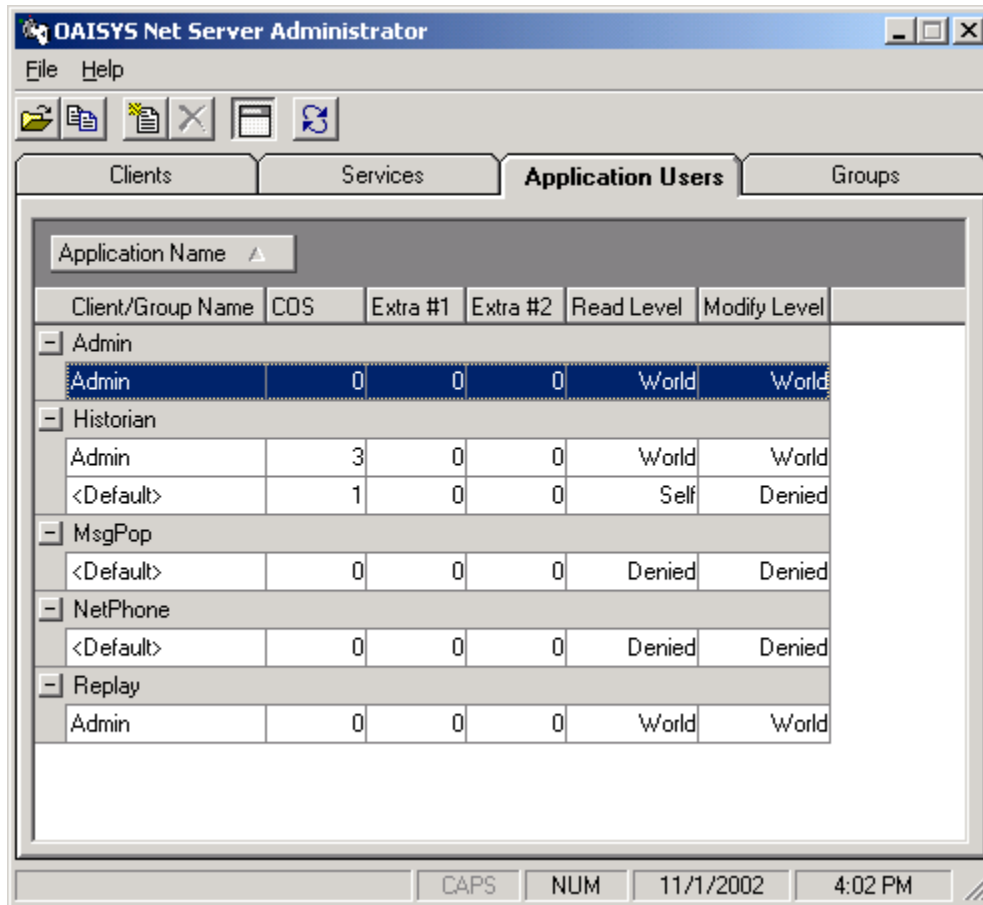
Remember to make them a member of the group(s) they will want to have access to.

You might want to also assign them a password that will be required when logging into Replay.

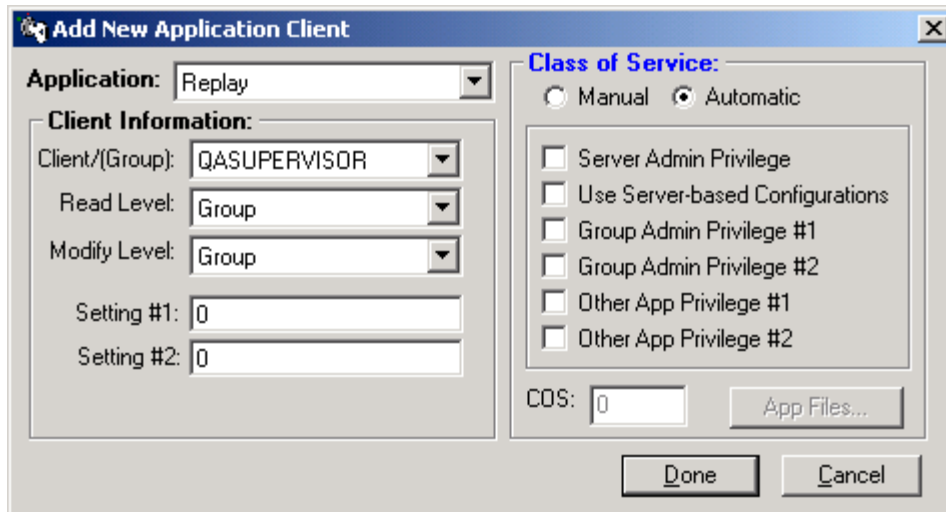


The screenshot shows the 'Edit Client' dialog box. It has a title bar with a close button. The main area contains several input fields: 'Username' with 'QASUPERVISOR', 'Password' with 'star', 'Extension' with '1003', 'Svc Access' with '0', and 'Logins' with '2'. There is a 'Change Password' checkbox which is unchecked. To the right, there is a list box titled 'Client Belongs to These Groups:' containing 'Agents' with a checkmark. At the bottom right of the main area is a 'New Group...' button. At the bottom of the dialog are 'Done' and 'Cancel' buttons.

5. Next, click on the **Application (Users)** tab. Click on the **add new record** icon.



6. Under **Application** choose **Replay**, then choose the user from the drop down menu that will have access to **Replay** (QASUPERVISOR in this example). Define what type of access they will have to **Replay**. (In most cases it will be **Group**) (This case the supervisor belongs to group agent)  
*World*-Access to all calls within the system (usually only Admin).  
*Group*-Access to only calls from within the same group.  
*Self*-Access to only calls from your extension



7. This completes the setup for a Replay user. This example walked through setting up a user with Group access to Replay. When logging into Replay the user will be prompted for a username and password. This login defines what recordings they have access to view and play.



**Please note:**

Any time a call goes to an extension that is part of the defined user group, the Replay user will have access to play and view the recording.  
 For example: If a call starts at an extension that is not part of the defined group and is transferred to a defined agent that is part of the group, the Replay user **will** have access to the **entire call**.

## ***Appendix D***

### ***OAISYS Feature Points explained***

OAISYS uses a feature point system to provide flexible options and easy upgrades. Each application uses a set number of feature points. To reduce confusion, customers order applications instead of feature points. If you order a Net Server basic and Auto Call Record, you will receive a key with 115 System Feature Points. If you later decide that you no longer need to record your agents, you can simply shut down Auto Call Record and run any other app that uses 75 or fewer System Feature points.

There are two primary categories of points: Desktop and System. Desktop points are used by client applications like Net Phone, DSS, and Chat. System points are reserved for server-side apps like Voice Assistant, Auto Call Record, and Call Router. Any System app can use System Feature Points, but it cannot use Desktop Feature Points. Likewise, Desktop Apps cannot use System Feature Points.

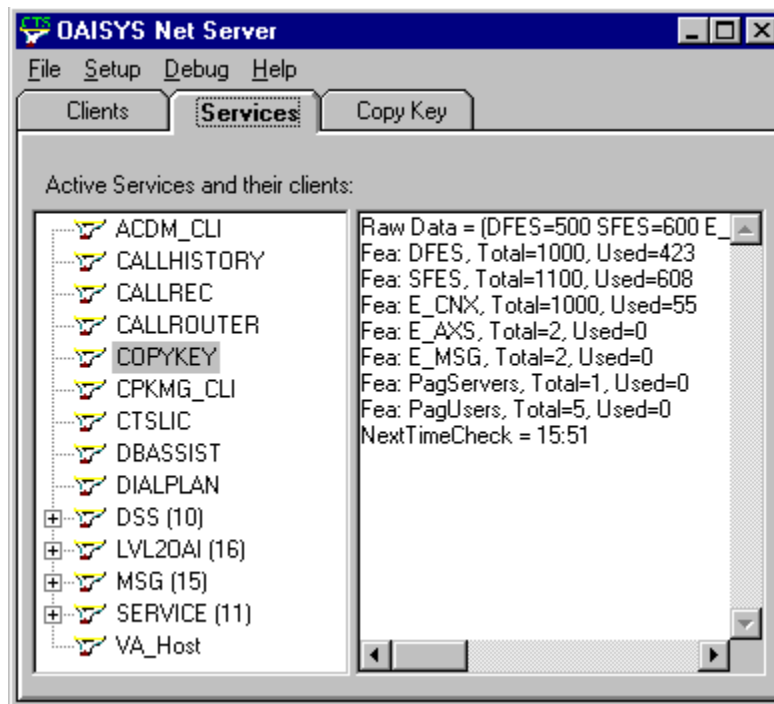
The table below shows the current OAISYS applications, the type of Feature Points used by the application, and the number of Feature Points used ***for each running application.***

| <b>App Name</b>                    | <b>Key</b> | <b>Feats</b> |
|------------------------------------|------------|--------------|
| Net Server Basic (NTCPU/RS-232)    | SFES       | 20           |
| Net Server Network (CT Gateway)    | SFES       | 40           |
| SMDR Service                       | SFES       | 40           |
| DB Assistant                       | SFES       | 110          |
| Voice Assistant (per port)         | SFES       | 22           |
| Voice Assistant Tracer (per port)  | SFES       | 22           |
| Tracer Recording Manager           | SFES       | 75           |
| ACD Manager                        | SFES       | 90           |
| Auto Call Record                   | SFES       | 75           |
| Call Router                        | SFES       | 75           |
| Park & Page Basic                  | SFES       | 35           |
| Park & Page Enhanced               | SFES       | 75           |
| App-Server 16                      | SFES       | 20           |
| Net Phone (per seat)               | DFES       | 22           |
| Group DSS (per seat)               | DFES       | 10           |
| Chat (Silent Messaging) (per seat) | DFES       | 8            |
| Desktop VBA (per seat)             | DFES       | 5            |

Customers always order products through a dealer or other authorized reseller. The dealer or reseller then places an order with CTS. This order is validated by CTS to ensure that the parts and quantities are correct. Following validation, an OAISYS System Copy Key (dongle) is programmed by CTS with the appropriate amount of System Features and Desktop Features ***based on the OAISYS applications ordered by the dealer.***

### ***OAISYS Feature Points Explained (cont.)***

Select the Services tab to see a list of applications connected to Net Server:

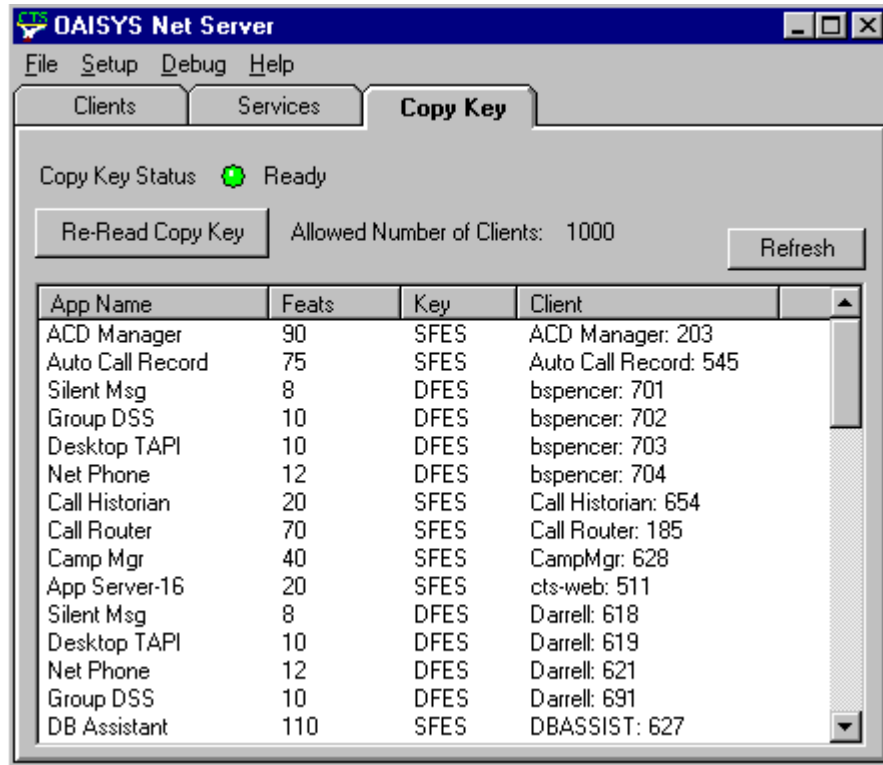


If you select “COPYKEY”, the second line in the right-hand pane shows the total number of Desktop Feature Points available and how many are used. The third line shows the same information for the System Feature Points.

If the available Feature Points is less than the total number required to run all of the applications that are installed, contact the dealer who placed the order so corrections can be made. All upgrades require a new order for the proper applications and the OAISYS CopyKey Number. You can find this number in the Net Server under Setup | CopyKey Upgrade. See the Net Server Operations Manual for details on the upgrade process.

## OAISYS Feature Points Explained (cont.)

You can see which users are using points on the Copy Key tab by clicking **Refresh**:



The screenshot shows the OAISYS Net Server interface with the 'Copy Key' tab selected. The 'Copy Key Status' is 'Ready'. The 'Allowed Number of Clients' is 1000. A 'Refresh' button is visible. The table below lists the applications and their feature point usage.

| App Name         | Feats | Key  | Client                |
|------------------|-------|------|-----------------------|
| ACD Manager      | 90    | SFES | ACD Manager: 203      |
| Auto Call Record | 75    | SFES | Auto Call Record: 545 |
| Silent Msg       | 8     | DFES | bspencer: 701         |
| Group DSS        | 10    | DFES | bspencer: 702         |
| Desktop TAPI     | 10    | DFES | bspencer: 703         |
| Net Phone        | 12    | DFES | bspencer: 704         |
| Call Historian   | 20    | SFES | Call Historian: 654   |
| Call Router      | 70    | SFES | Call Router: 185      |
| Camp Mgr         | 40    | SFES | CampMgr: 628          |
| App Server-16    | 20    | SFES | cts-web: 511          |
| Silent Msg       | 8     | DFES | Darrell: 618          |
| Desktop TAPI     | 10    | DFES | Darrell: 619          |
| Net Phone        | 12    | DFES | Darrell: 621          |
| Group DSS        | 10    | DFES | Darrell: 691          |
| DB Assistant     | 110   | SFES | DBASSIST: 627         |

This tab view can assist troubleshooting by displaying which specific clients are using the Feature Point resources.

- **App Name:** The name of the OAISYS application using Feature Points.
- **Feats:** The number of Feature Points being used by the application.
- **Key:** This shows the type of Feature Points used, SFES for System Features”, DFES for “Desktop Features”.
- **Client:** The Name of the client as it is logged into the Net Server.

An example would be the following: The Client column shows that the user logged in as “Darrell” is running four client applications. The App Name column shows that Darrell is running Chat (Silent Msg), Desktop TAPI, Net Phone, and Group DSS. The total being 40 Desktop Feature Points (DFES) used by Darrell.