



## Archive Database Guide

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**AMERICAS HEADQUARTERS**

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## OVERVIEW

This document will take you through the process of establishing and maintaining an OAISYS Archive Database. An Archival Database provides users with a complete compliance solution to fit their call recording and archival needs in any situation. Many compliance regulations require organizations to store data for years in the event a complaint or dispute arises. OAISYS storage functionalities for version 7.2 and later affords organizations the ability to enable automatic, targeted relocation from a primary database to an archival database that still enables instant search to access the same interface used to manage online recordings. When combined with Variable Lifecycle Management functionality, any call in the archival database, in conjunction with its associated data and supplemental information (i.e., annotations and screen recordings) can be instantly retrieved. If additional supplemental information is added after retrieval, the file is automatically updated.

## REQUIREMENTS

<b>OAISYS Recording System</b>	
<b>OAISYS Version</b>	7.2 or Later
<b>Operating System</b>	Windows 7 OR Windows Server 2012
<b>CPU</b>	Dual Core - <i>Minimum</i> Quad Core - <i>Recommended</i>
<b>RAM</b>	4GB - <i>Minimum</i> 8GB - <i>Recommended</i>
<b>SQL Server</b>	SQL Server 2012 Express OR SQL Server 2012 Standard
<b>Storage (SATA HDDs)</b>	1 TB - <i>Minimum</i>
<b>Network</b>	2 x Gigabit

**NOTES:** Standard SQL is limited by the size of the hard disk

SQL Express can be used; however, the size of the database is capped at 4GB on SQL 2005 or 10GB on SQL 2008/2012.

## SECTION 1

### ACCESS TO WINDOWS NETWORK RESOURCES

Any OAISYS Service that needs access to Network Resources must be run under an account that has access rights enabled for those resources. This will be a domain user account.

**NOTE:** For services to start, the user account must have local admin rights on the server. By default, OAISYS Services run under the local System Account.

#### TO CHANGE THE LOG ON FOR A SERVICE

From the Services applet → double-click on a service → select the Log On tab

See Screenshot below:





## LICENSING

Software licensing for the Archive Database is available upon request from OAISYS at no charge. Keyless Licensing consists of a lock number and registration ID administered through the Automated Service Center of your OAISYS Solution; hardware dongles are not required but are available upon request.

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 | **Licensing**

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**Automated Service Center:**

Web Link Status: ● Operational

**Registration:**

Registration Status: **NOT REGISTERED**

Lock #:  Lock Type:

Registration ID:

Dealer Contact Name:

Dealer Contact Email:

Customer Contact Name:

Customer Contact Email:

**NOTE:** If you are using a Hardware key, the Lock Type will display as ???.



## HOUSEKEEPING, HISTORIAN & TRM REQUIREMENTS

The OAISYS archive server has a configuration option to set housekeeping rules for this database and is similar to that of the OAISYS recording server. Both the primary and secondary servers require the Housekeeping, Historian, and TRM Service log on account to have permissions enabled to query the SQL Server shares on the other server (using level 502).

- Level 502 is the lowest level providing the share name and its local path, and specifies the type of information required.
- The primary server must have access to the share on the secondary server where the database is held.
- The secondary server must also have access to the share on the primary server where the database is held.

For the remote databases to be backed up, please create a share for the TritonBackup folder on the Primary Tracer server. The default is typically on the C: drive. The SQL Server services of the remote database server will require a logon account with privileges to that share.

Regardless of the level of permissions, services CANNOT use drive mappings.

- For example, "Z:" cannot be mapped to a share because the Services run in a different session than the user login session, and drive mappings are not shared between sessions.
- Services must use a full UNC to access a share (e.g., [\\computername\sharename\subfolder](#)).

Network shares and permissions must be set up appropriately to provide TRM service access to PVDs that don't reside on the OAISYS server trying to take action on them:

- Each OAISYS server TRM requires read access to the all screen recording PVDs for viewing. This is because the screen recording PVD is opened from the Tracer TRM that opened the corresponding audio PVD.
- The Archive server TRM must have read/write access to all staged PVDs for



archiving.

- The Primary Tracer server TRM requires read/write access to all archived PVDs for viewing. This is because an archived PVD is always opened from the Primary Tracer server TRM.

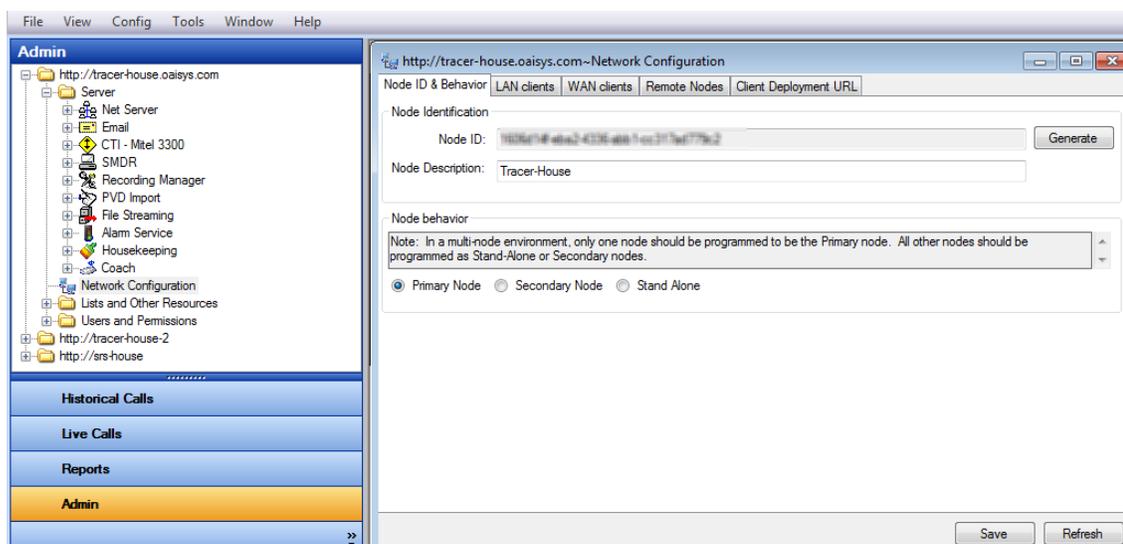
**NOTE:** This requires Administrator, Power User, Print Operator, or Server Operator group membership to successfully execute the NetShareEnum function at levels 2 and 502 (Windows Server 2003, Windows XP). The Windows user account must belong to one of these groups to gain network access.

## SECTION 2

### MULTIPLE SERVERS SETUP

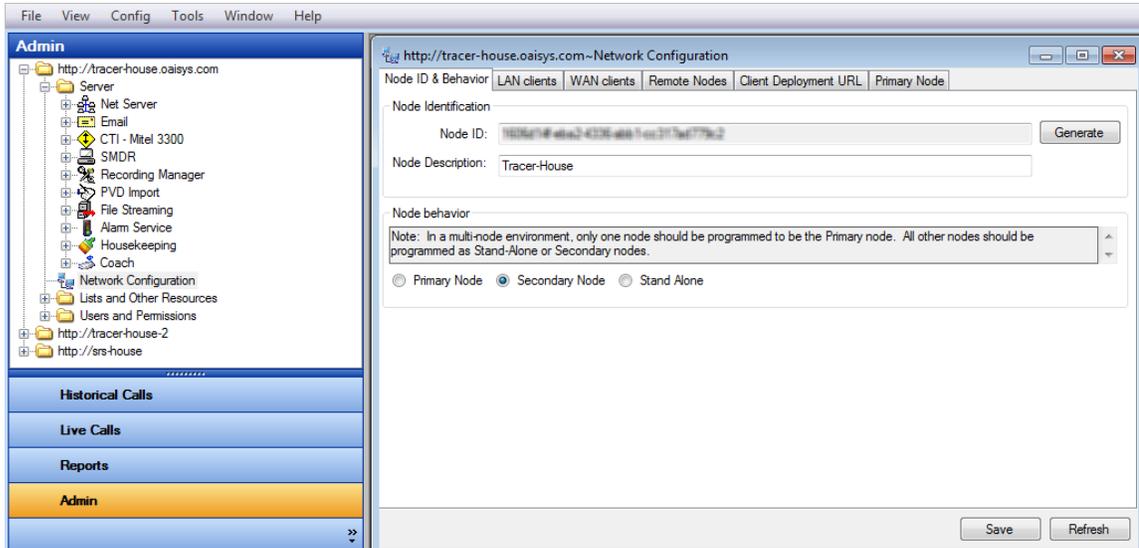
1. When logged into the primary server, from Network Configuration → Node ID & Behavior Tab → select Primary Node

**NOTE:** When switching node behavior, the client will be disconnected and will require the user to login again.



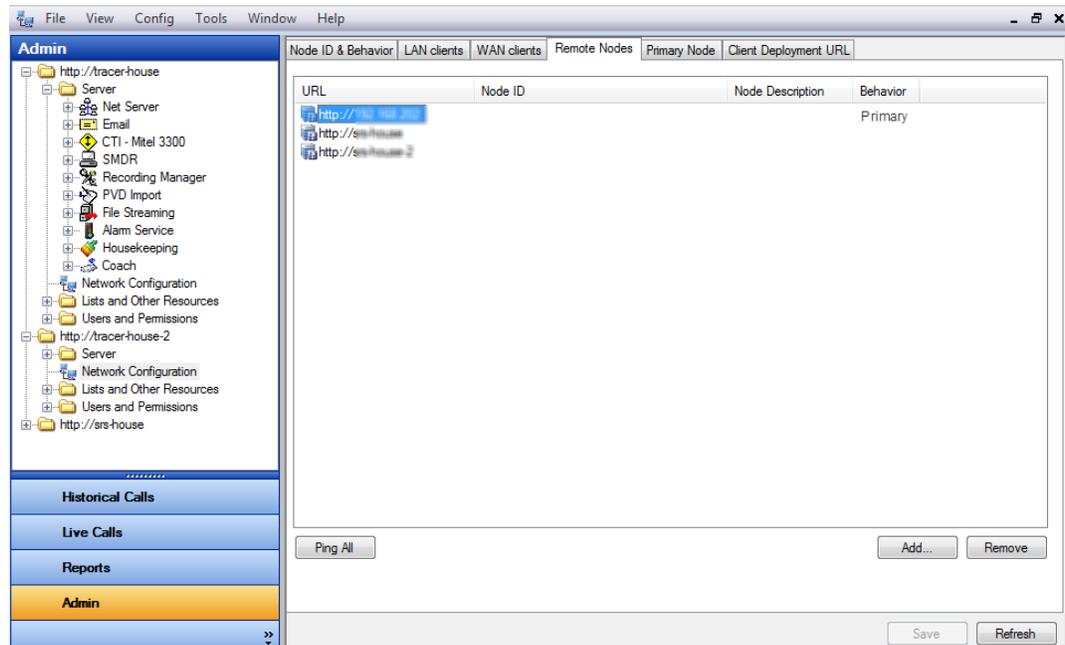


2. When logged into the secondary server, from Network Configuration → Node ID & Behavior Tab → select Secondary Node



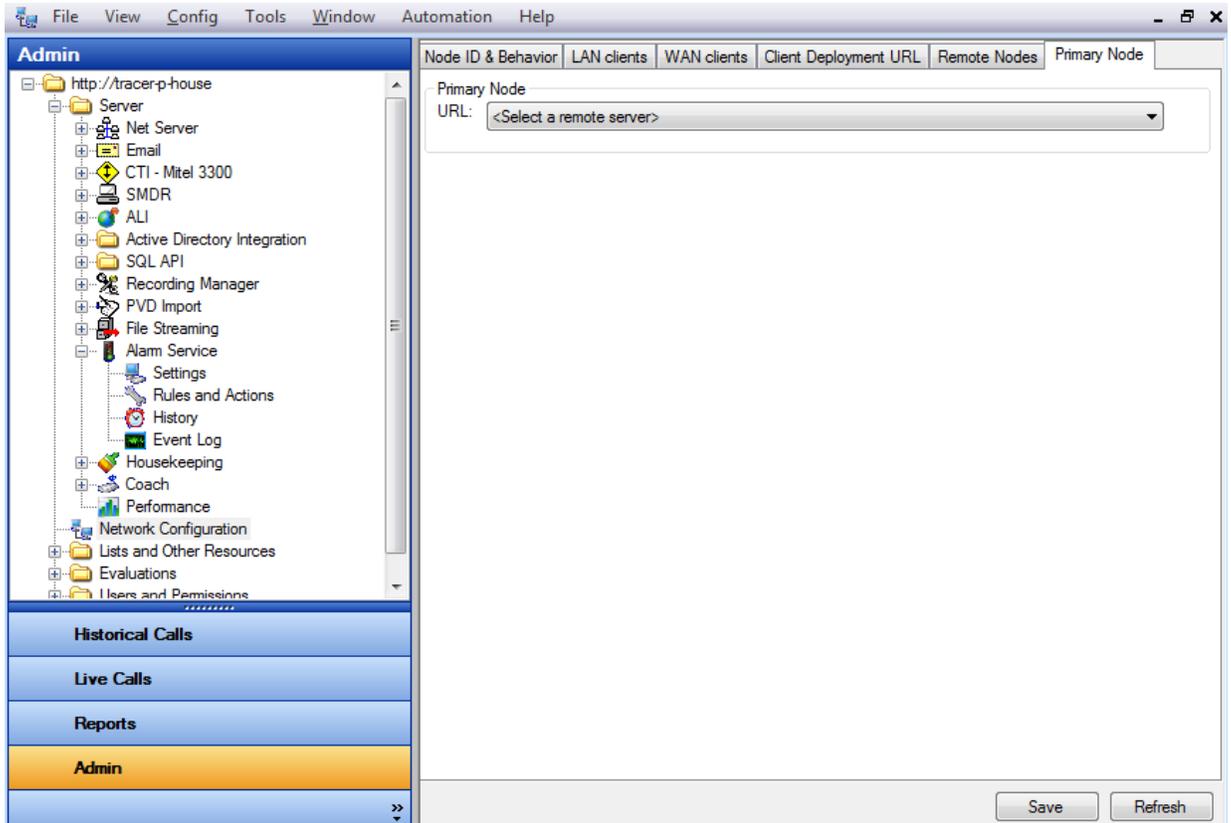


3. Next, on the secondary system: from the Remote Nodes Tab → click Add → enter the IP address or host name of the Primary Server/Node → click Ping All
  - a. This should show a green check indicating communication is enabled, and the Behavior column should be filled out with Primary as shown below:



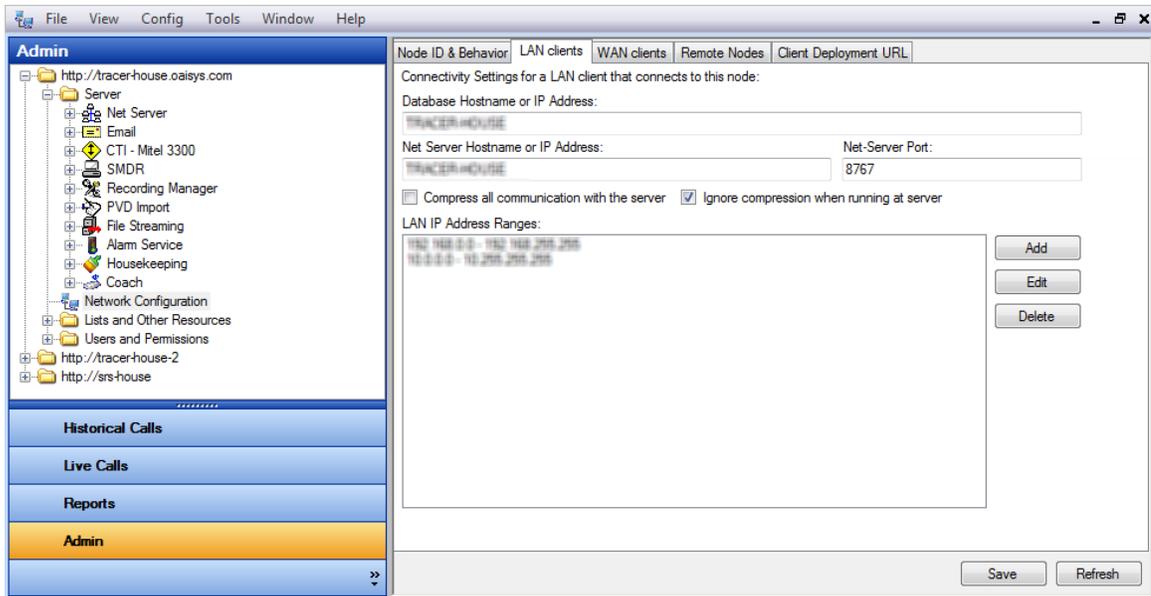


4. Go to the Primary Node Tab → select the Primary Node from the drop down list → click Save





5. Return to the Primary server → add the remote server/node(s) on the Remote Node Tab → click Ping All → verify the Behavior column indicates Secondary



## SECTION 3

### ESTABLISH CALL ARCHIVING

1. Ensure the server is appropriately licensed
2. Verify networking the server with other nodes has been completed according to the steps in the previous section
3. Set up Orphan Recovery to recover (archive) from the staging location of the Tracers



Nightly Recovery  
Scan documents modified on or after:  
3/21/2012 4:01:55 PM

Source Directory

Recordings directory

Custom directory:

\\qa-archive1\StagedA

**NOTE:** The Archive Server is limited to just one staging folder that it imports from in this release. Query performance may be impacted by the size of the database.



- 4. On the primary server → define user permissions to view and restore archive calls

Tracer Calls Permissions for User "Dawn Davis"

General Users User Groups Call Filters

Folders		Documents			
	Allow	Deny		Allow	Deny
Add new folders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Permanently delete documents	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Change my folders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Remove documents from document folders	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete my folders	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Share documents with guest users	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Change document expiration dates	<input type="checkbox"/>	<input checked="" type="checkbox"/>
			Export call data to a CSV file	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Export audio from documents to the file system and email	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Playback screen recordings associated with audio to which you have playback permissions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Create, edit, and delete guest user accounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>
			View captured digits	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Slice Calls	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Merge Calls	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Redact portion of the document	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Archive Database		Allow	Deny
Use/View the archive database	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Restore calls from the archive database	<input checked="" type="checkbox"/>	<input type="checkbox"/>	