PORTA ONE

PortaSwitch

Configuration Server Web Reference

65

MAINTENANCE RELEASE

©2000-2017 PORTAONE, INC. ALL RIGHTS RESERVED.

WWW.PORTAONE.COM

Copyright Notice & Disclaimers

Copyright © 2000–2017 PortaOne, Inc. All rights reserved

PortaSwitch® Configuration Server Web Reference, September 2017
Maintenance Release 65
V1.65.01

Please address your comments and suggestions to: Sales Department, PortaOne, Inc. Suite #408, 2963 Glen Drive, Coquitlam BC V3B 2P7 Canada.

Changes may be made periodically to the information in this publication. The changes will be incorporated in new editions of the guide. The software described in this document is furnished under a license agreement, and may be used or copied only in accordance with the terms thereof. It is against the law to copy the software on any other medium, except as specifically provided in the license agreement. The licensee may make one copy of the software for backup purposes. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopied, recorded or otherwise, without the prior written permission of PortaOne, Inc.

The software license and limited warranty for the accompanying products are set forth in the information packet supplied with the product, and are incorporated herein by this reference. If you cannot locate the software license, contact your PortaOne representative for a copy.

All product names mentioned in this manual are for identification purposes only, and are either trademarks or registered trademarks of their respective owners.

Table of Contents

Preface ... 4
Document Objectives ... 5
Audience ... 5
Hardware and Software Requirements ... 5

1. Introduction ... 6

Login to the Configuration Server Interface ... 7

2. System Management ... 11

Servers ... 12
Configurations ... 17
Environments ... 22
Users ... 23
Update ... 25
Custom ... 25
Deposit ... 32
Task Monitor ... 32

3. Initial Configuration of PortaSwitch® ... 34

Add Servers ... 36
Add IP Addresses ... 36
Create a Configuration ... 37
Add Instances ... 38

4. How To 44

... Change Configuration Options? ... 45
... Create New Billing Environments? ... 46
... Configure Several PortaSIP® Clusters in PortaSwitch®? ... 48
... Add an Alias to the PortaSIP® Cluster's IP Address ... 51
... Migrate an Instance? ... 52
... Migrate an IP Address? ... 54
... Configure a MySQL Database White List ... 56
... Define New Default ACLs ... 57
... Delete an Active Billing Environment? ... 58
... Configure Search Parameter List for the SIP Log Viewer? ... 59
... Enable Additional Validation of Dialing Rule Emergency Numbers? ... 61
... Configure an Adaptec RAID Health Monitoring? ... 62
... Configure a Backup Procedure? ... 62

5. Appendices ... 63

APPENDIX A. Internal Modules of the Billing Engine ... 64
APPENDIX B. Paths to Tops of Build Areas in SRPM Packages ... 66

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Preface

This document provides a general overview of the web interface for the PortaSwitch® Configuration server.

Where to get the latest version of this guide

The hard copy of this guide is updated upon major releases only, and does not always contain the latest material on enhancements that occur in-between minor releases. The online copy of this guide is always up to date, and integrates the latest changes to the product. You can access the latest copy of this guide at **www.portaone.com/support/documentation/**.

Conventions

This publication uses the following conventions:

- Commands and keywords are given in **boldface**.
- Terminal sessions, console screens, or system file names are displayed in `fixed width font`.

Exclamation mark draws your attention to important actions that must be taken for proper configuration.

NOTE: Notes contain additional information to supplement or accentuate important points in the text.

Timesaver means that you can save time by taking the action described here.

Tips provide information that might help you solve a problem.

Gear points out that this feature must be enabled on the Configuration server.

Trademarks and Copyrights

PortaBilling®, PortaSIP® and PortaSwitch® are registered trademarks of PortaOne, Inc.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Document Objectives

This publication provides technical information on the PortaSwitch® Configuration server's web interface usage. It is designed for use either in conjunction with other materials or as a standalone reference.

Audience

The target audience of this document is comprised of system administrators, VoIP engineers and system operators who will be managing your PortaSwitch® system via the web interface of the configuration server.

Hardware and Software Requirements

Client System Recommendations

- **OS:** MS Windows XP or above, Linux/BSD, Mac OS X 10.6 or above.
- **Web browser:**
  - Google Chrome 55 or above, Mozilla Firefox 50 or above.
  - JavaScript and cookies must be enabled.

- **Spreadsheet processor:** MS Excel, OpenOffice Calc, LibreOffice Calc, Google Sheets.
- **Display settings:** A minimum screen resolution of 1280 × 800.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

1. Introduction

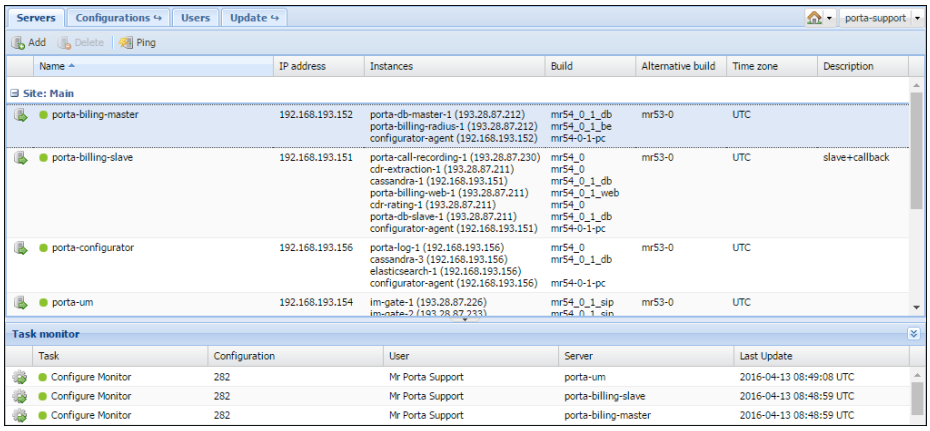
© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Login to the Configuration Server Interface

Open the Configuration server web interface in a browser (**https://<configuration_server_name>:8700** by default) and type in the username and password which were provided to you.

The web interface of the configuration server contains:

- Tab selector
- Action buttons
- Toolbar
- Data table
- Task Monitor



Tab Selector

In the upper left-hand corner, there are four main functional tabs and three additional tabs that allow you to manage the different elements of your PortaSwitch® system. The main functional tabs are: **Servers**, **Configurations**, **Users** and **Update**.

The **Environments** tab becomes visible when you open the **Configurations** tab.

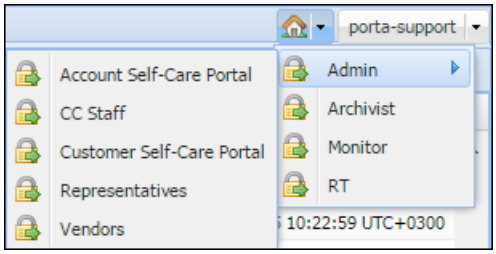
The **Custom** and **Deposit** tabs become visible when you open the **Update** tab.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

The definitions of and available functionality for each tab are explained in the following sections. Note that not all users have complete access to the entire set of tabs.

Action Buttons

The **Home** icon in the right-hand corner contains a menu with shortcuts to all the other PortaSwitch® interfaces:



The **Admin** button – shortcut to the administrator web interface of PortaBilling:

- **Customer Self-Care Portal** – Interface for customers (owners of IP Centrex environments).
- **Account Self-Care Portal** – Interface for account owners (end users).
- **CC Staff** – Customer care staff interface.
- **Vendors** – Interface for your termination partners.
- **Representatives** – Interface for your sales agents or distributors.

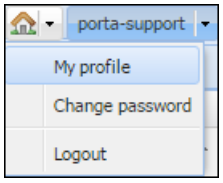
The **Archivist** button takes you to the web interface where you can configure backup for the most critical data on your installation.

The **Monitor** button takes you to the web interface of the monitoring facility for your PortaSwitch installation.

The **RT** button takes you to the web interface of the trouble tickets system where you can view the list of your requests and perform the needed actions (e.g. close, update or create a new ticket).

Other buttons in the upper right-hand corner allow you to perform a given action, irrespective of the current context.

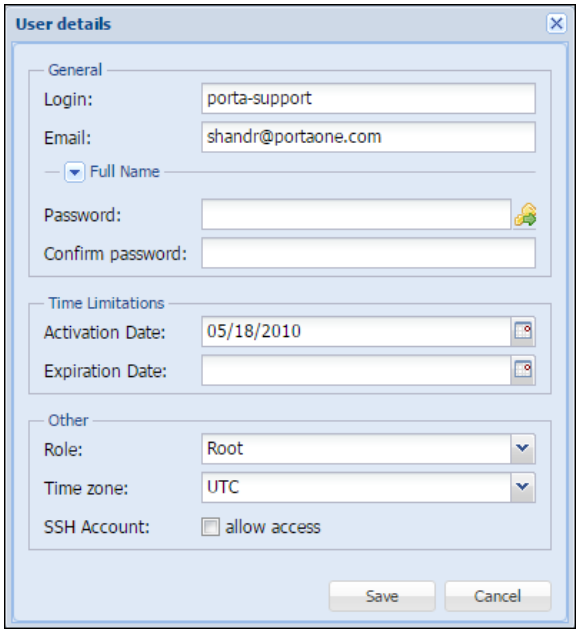
© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



The **Change password** button allows you to change the password for the current user.

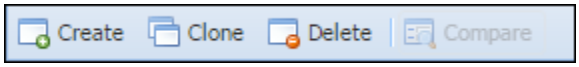
The **Logout** button terminates your current session on the web interface.

The **My profile** button allows you to fill in information about the currently logged-in user:



Toolbar

The Toolbar contains buttons that allow you to perform specific operations with the items displayed in the table below.



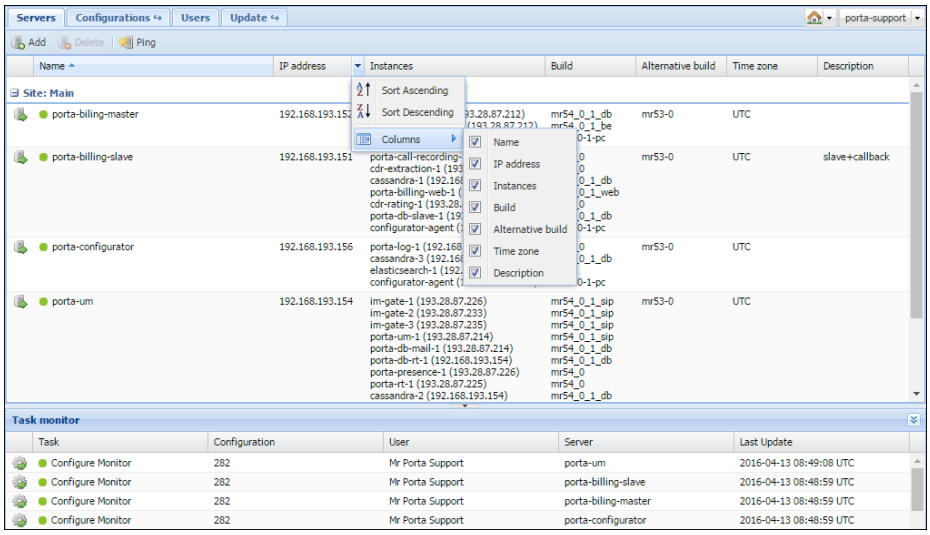
Item Table

The Item Table is your main working area, since it contains the items that you will edit.

You can change the number of columns and sort them in ascending or descending order by clicking your mouse on the field name of any of

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

these tabs. If you point your mouse at the column heading you will see a triangle; click on it to see the menu where you can sort items and add or remove columns by selecting or clearing corresponding check boxes.



At the bottom of the page, you can see the task monitor illustrating which tasks were performed. You can see which user performed the task, the server on which the task was performed and the time of the last update. See the **Task Monitor** section for detailed information.

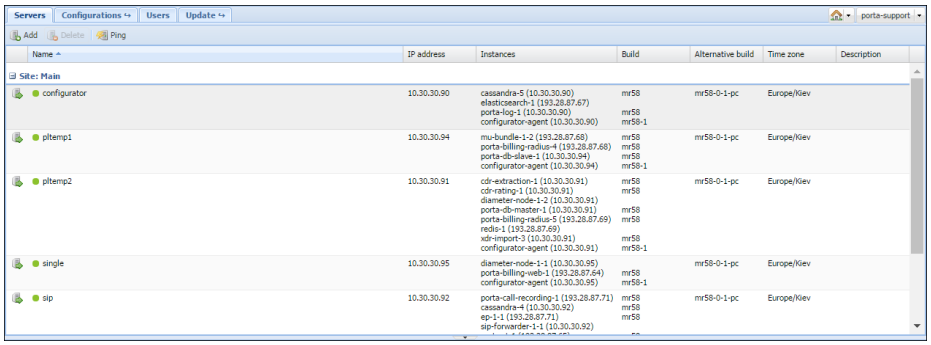
© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

2. System Management

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Servers

The information on the **Servers** tab shows all the servers that are part of your installation.



Field	Description
Name	The name of the server.
IP address	The internal IP address of the server – this address is used on the internal LAN to manage the server from the configuration interface.
Instances	Shows all instances – services that run on your server (e.g. "web interface" or "SIP server") and are assigned to a specific server.
Build	The current software version which is installed and used on the server.
Alternative build	Another software version currently installed on the server (on the inactive partition); a rollback to this version is possible. "N/A" means that the alternative partition does not contain any data.
Time Zone	The time zone in which this server is operating. In order to provide optimal system response time for your online users, PortaBilling® only performs resource-intensive calculations (such as creating statistics / invoices) during the preconfigured "off-peak" period. This field specifies the time zone in which the "off-peak" period is configured.
Description	A short description of the server. This field is optional.

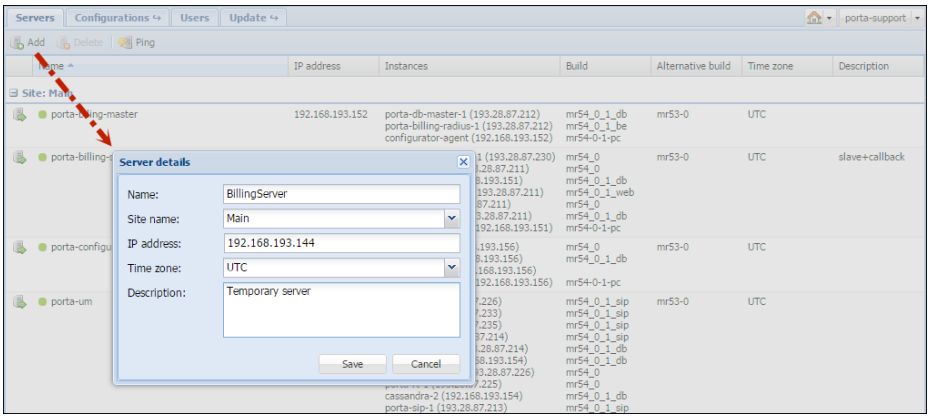
An indicator near the name of a server shows whether a specific server is reachable (green light) or unreachable (red light).
The **Servers** page provides the following activities:

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Field	Description
Add	Allows you to add more servers. You will see a dialog box where you should enter the name of the server, its IP address, a short description and specify a time zone; then click **OK**.
Delete	Allows you to delete the selected server.
Ping	Allows you to check the availability of the server. Just click on the **Ping** button and the Configuration server will attempt to verify that it can connect to this server and that the server responds to management commands. If you see a green light, the server is available; if red, then it is not available.

Add / Edit a New Server

If you want to add a new server (make sure you first have installed the PortaSwitch® software on it using the provided PortaSwitch® installation ISO files) – click the **Add** button in the toolbar and type in new server's name, IP address and description. Select a site where the server is located and a time zone in which this server is operating:

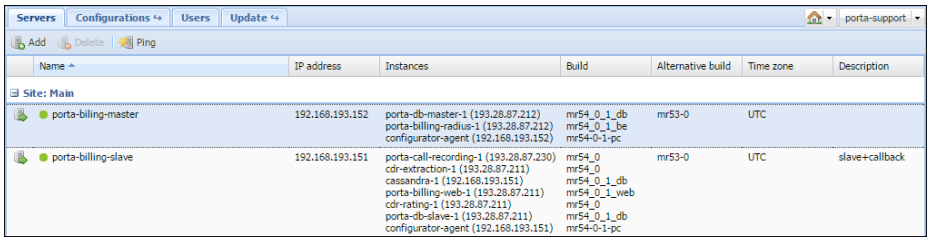


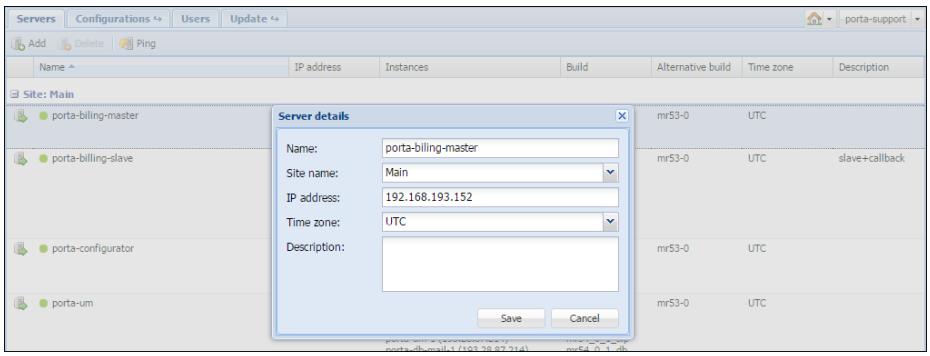
NOTE: When adding a server to the installation on this page an IP is specified. This IP is automatically considered to be internal, so it (and its NIC) becomes read-only in the Network configuration UI.

NOTE: When assigning a server's name, be aware that you should not use a name that begins with "porta-" in order to avoid any confusion in the system.

To edit attributes of an existing server, double-click on the row with the server you want to modify.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

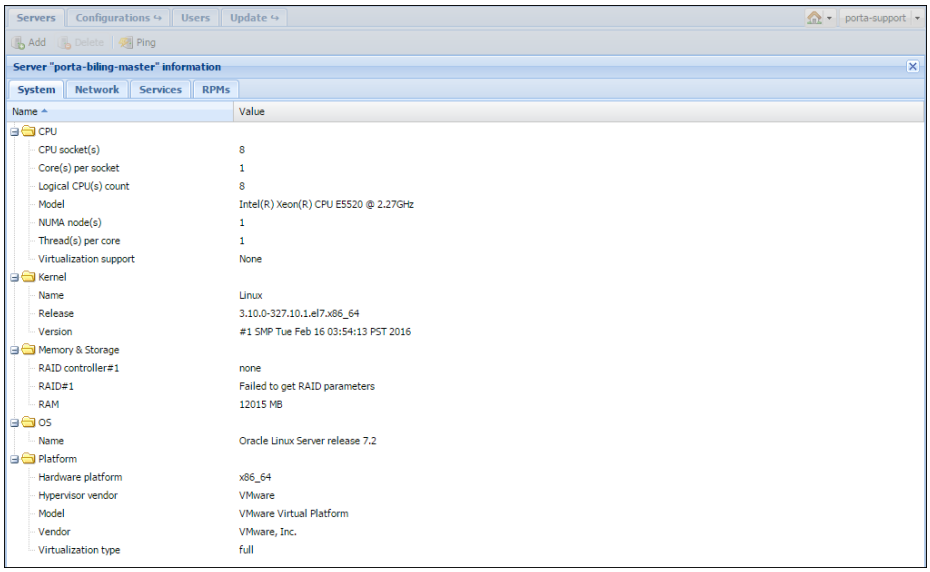




Additional Server Configuration

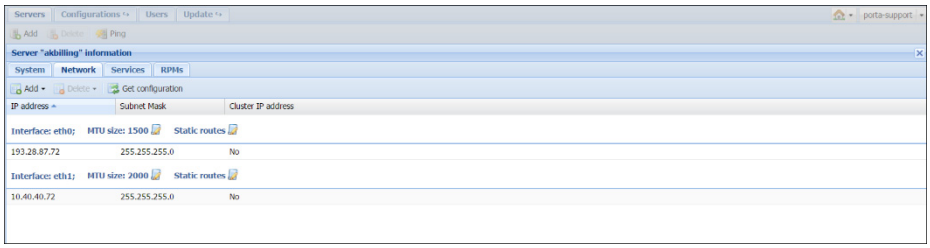
When clicking the **Server Information** button, an additional block opens. This block contains several tabs with different server properties. You can switch between these tabs to access the corresponding information.

The **System** tab displays basic hardware and software information about the selected server:



The **Network** tab shows the list of all IP addresses configured for the selected server.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



The list is grouped by a network interface. The following columns are shown in the list:

- IP Address
- Subnet Mask
- Cluster IP address (specifies if this IP address is dedicated to a cluster)

To change either the IP address and / or the subnet mask, just double-click on an appropriate list element). In the pop-up window you can edit the parameters and then press OK.

NOTE: Network interface with internal IP cannot be modified.

The **Add** button in the toolbar allows you to add a new IP address to a network interface (only those network interfaces that do not have an internal IP address are available) or add virtual interfaces.

To add and / or modify static routes for a specific server, click the **Static routes** icon. It is important to define the routes in the correct format (as in the `ip route add` command) to avoid misconfiguration.

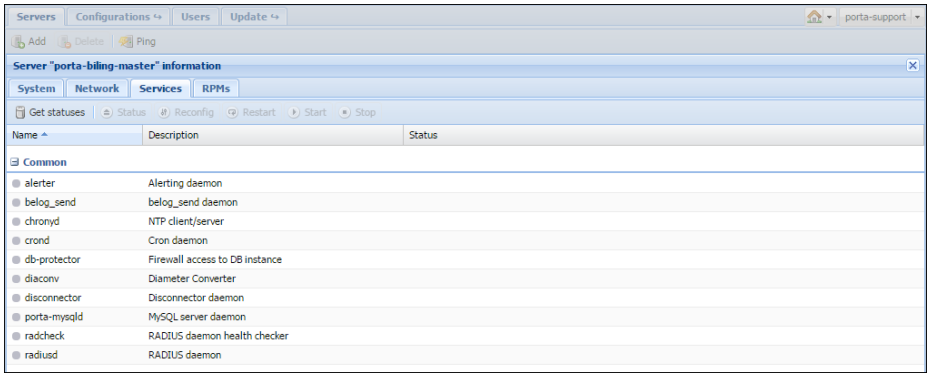
NOTE: To effect changes in the network interface configuration, you have to apply a new configuration on the **Configurations** tab.

The **Network** page provides the following:

Field	Description
Add	Allows you to add a new IP address to a network interface or add virtual interfaces (VLANs for trunking) and / or network bonding (link aggregation).
Delete	Allows you to delete the selected IP address (not available for internal IP addresses).
Get Configuration	Gathers information about current network configurations from all servers and updates block content accordingly. Note that any changes made on the **Network** tab without applying a new configuration will be lost.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Using the **Services** tab you can control the services that are located on the selected server.

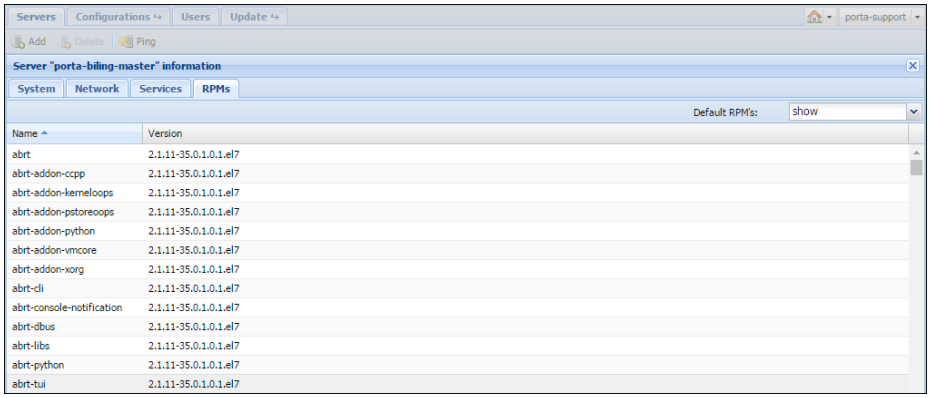


The **Services** tab provides the following activities:

Field	Description
Get statuses	Updates and shows the statuses of *all* services on the server.
Status	Updates and shows the status of the currently selected service.
Reconfig	Re-reads certain configuration parameters without an actual restart.
Restart	Restarts the currently selected service.
Start	Starts the currently selected service.
Stop	Stops the currently selected service.

Services are grouped by instances created on the server. The top **Common** group contains general services.

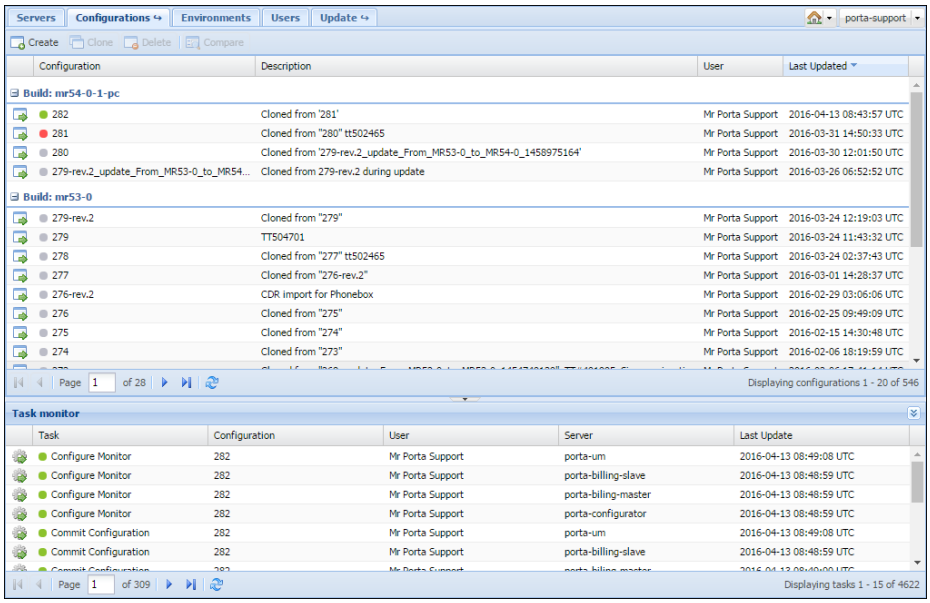
The **RPMs** tab displays RPM packages installed on the selected server.



© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Configurations

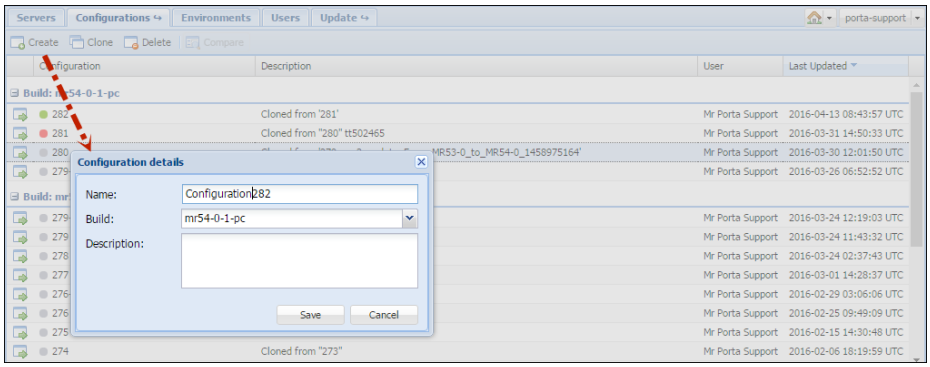
This tab allows you to manage the configurations used in your PortaSwitch® system (each row represents a configuration tree).



Field	Description
Indicator	Shows the type of configuration: • A **green** indicator – Active configuration (the one currently applied). • A **red** indicator – Backup configuration (the configuration previously used). • A **grey** indicator – Inactive configuration.
Configuration	The name of the configuration.
Description	A short description of the configuration. This field is not mandatory.
User	The user who performed the configuration.
Last Updated	The time when the configuration was last edited.

You can create a new configuration by clicking the **Create** button, typing in its name and description and choosing which software version it applies to.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

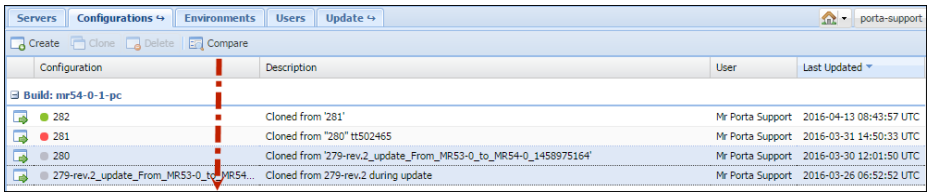


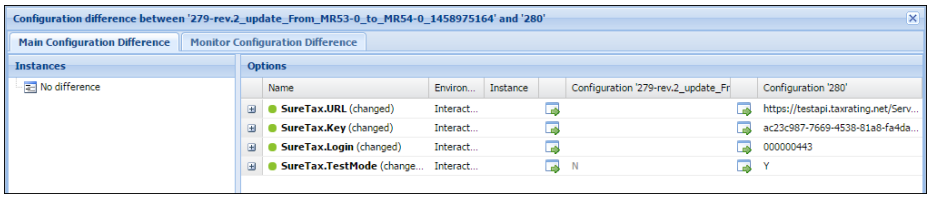
If the configuration already exists, you can edit its description by double-clicking on it.

You can clone the configuration by clicking the **Clone** button (to clone a configuration means to copy it), or delete it using the **Delete** button.

You cannot change or delete the active (currently applied) or the backup (previously used) configurations. This is to ensure that there is always a "stable" configuration you can use for rollback. You can open such a configuration for review using the **Configuration Details** button, or you can create a new configuration as its exact copy (and then edit this new configuration) by using the **Clone** button.

You can easily compare two configurations and see the differences between them. Choose two configurations by holding down the **Ctrl** button on your keyboard, and then click the **Compare** button which will become highlighted above.



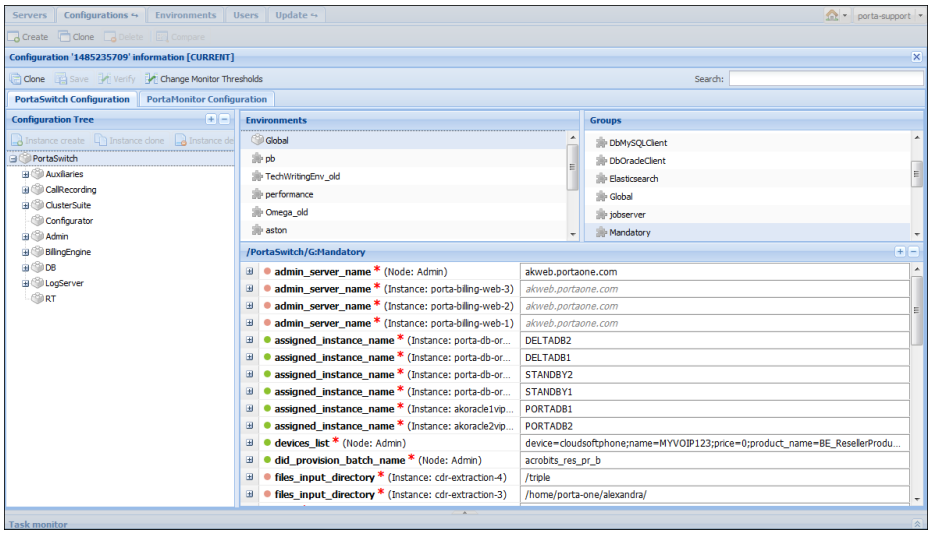


Click the **Configuration Details** button for the required option of the corresponding configuration to open it in the configuration editing mode. Bear in mind that you cannot change or delete the options of an active or backup configurations.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

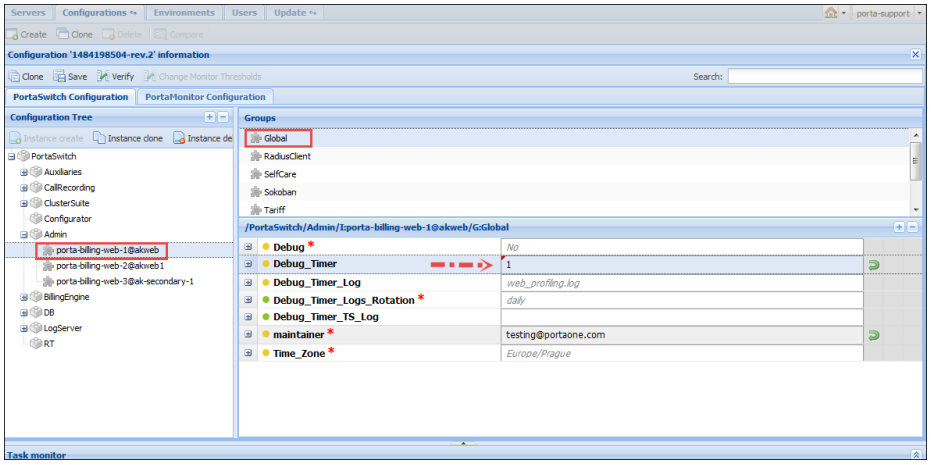
Configuration Information

On this page you can see the **Configuration Tree**, **Environments**, **Groups** panels and the panel where all the configuration options for a given service are shown.



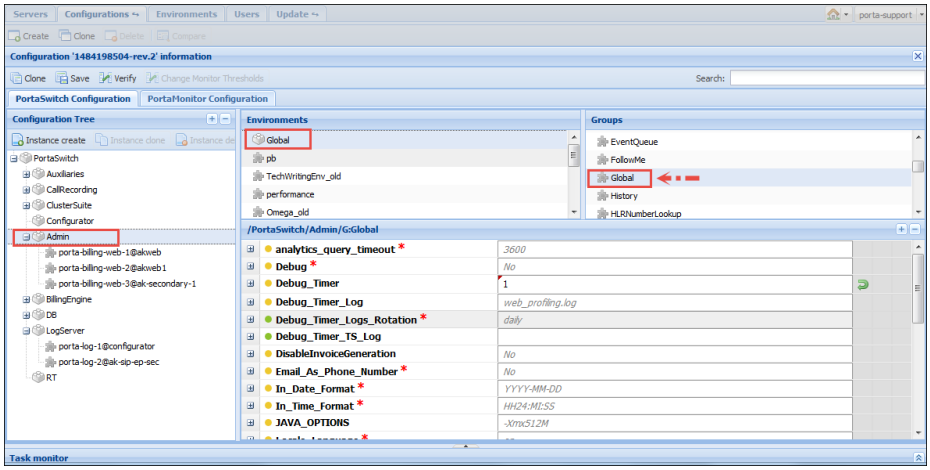
Some options can be specified at the level of the particular instance and at the level of the configuration tree node that holds this instance.

For example, in the **Configuration Tree** panel you can choose **PortaSwitch→Admin→porta-billing-web-1@akweb** and set the **Debug_timer** option for this instance. (You can find this option in the **Global** group.)



But you can also specify the same option at the level of the configuration tree node (**PortaSwitch→Admin→…**).

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



If you specify the option value at the level of the configuration tree node, it becomes a *default* value for all the instances under this configuration tree node. The Configuration server will choose which value to use according to the following rule:

- If you specify the option value at the level of a particular instance, the Configuration server will use this value and ignore the data specified at the level of the configuration tree node;
- If you leave the option value at the level of a particular instance blank, the Configuration server will use the *default* value – that is, specified at the level of the configuration tree node.

The same rule applies when you specify options for environments.

You can set up configuration options for each billing environment separately or you can do this globally for all billing environments by specifying a *default* value.

Note that it is not always correct to specify default (global) values for the options since such settings are applied to all instances, some of which may be located on different physical servers. For example, if you set private LADDR (Layered-Architecture Device Driver) for PortaSIP® on the global level, the configuration will be correct as long as all virtual PortaSIP® instances are located on the same physical server. However, if PortaSIP® cluster is deployed within PortaSwitch® installation, there are two or more PortaSIP® servers. In such cases, setting a default value for the private IP address (LADDR) may not be correct since some PortaSIP® instances that are located on other physical servers, may adopt the specified IP address (that doesn't belong to their server).

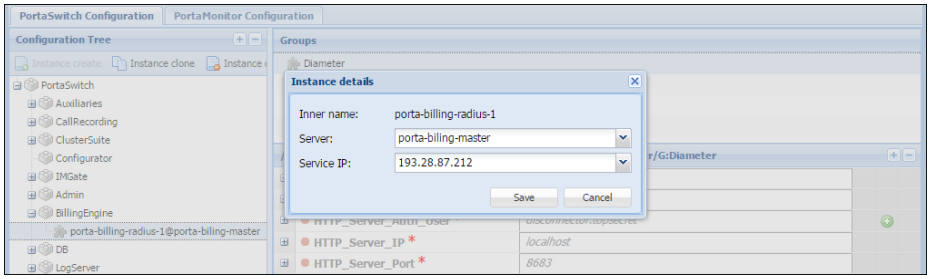
Instances

A service which runs on your server (e.g. "web interface" or "SIP server") is called an instance. Each service requires its own IP address, so that it can be accessed by your customers. To add a new instance, press the

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

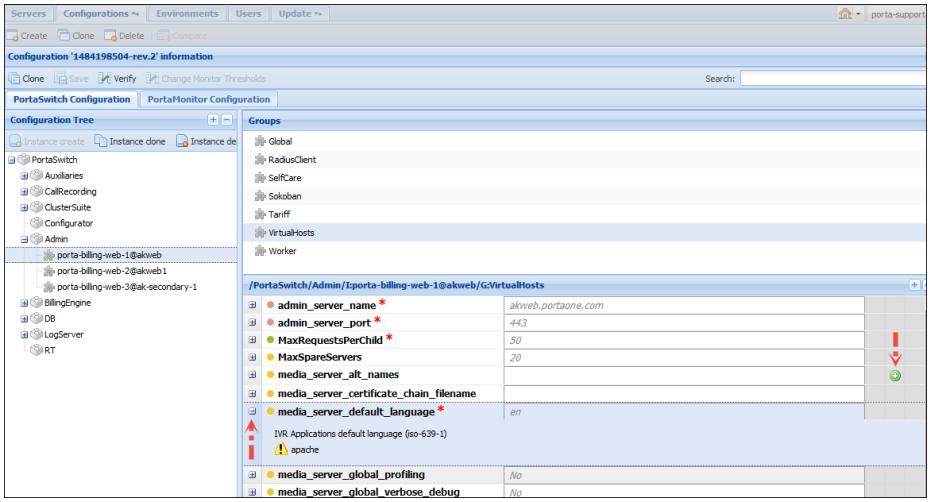
Instance create button. In the pop-up window, choose the server which this instance will run on, its service IP and a billing environment where this instance will run, and then press **Save**.

To change these settings later on select the instance from the configuration tree and double-click on it.



In the configuration options window, you can see instance options with either default values (shown in grey) or explicitly defined values (shown in black). To edit a specific option, double-click on it. You can also add one more value by using the **Add Value** button.

To find additional information about the required option, click the plus sign on the left. Once you open the required option, you will see its description and an alert about possible action in case you change the option value:



If you see red or yellow triangles – the option value change requires a service restart or reload (there might be a period of service downtime when you apply this configuration).

If you want to create one more instance with the same options as in the existing one, use the **Instance clone** button.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

After all the values have been set, click the **Verify** button to see the differences between the current configuration and the intended one. Then, click **Check/Apply** button to verify if the configuration is valid (e.g. all the required options have values assigned to them); then on the pop-up window with the status information you can choose whether to perform a complete check or apply the configuration right away.

If you want to check whether any services will be restarted when a new configuration is applied (e.g. for more suitable scheduling) press the **Complete Check** button. The system will simulate the whole procedure and provide a detailed log of actions that will be executed when the configuration is applied.

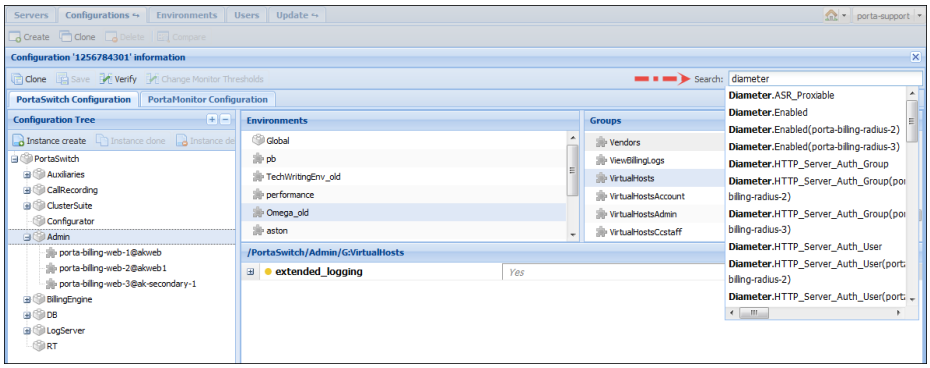
NOTE: When you apply a backup PortaSwitch configuration, the backup network configuration is simultaneously being applied.

If you are satisfied with the results of the preliminary check, press the **Apply** button. As soon as the configuration has been applied, you will see this action displayed on the Task page.

NOTE: The **Check/Apply** button saves the configuration before checking it.

NOTE: We strongly recommend AGAINST applying a configuration that contains instances residing on the servers that in turn are not available (server is down for some reason).

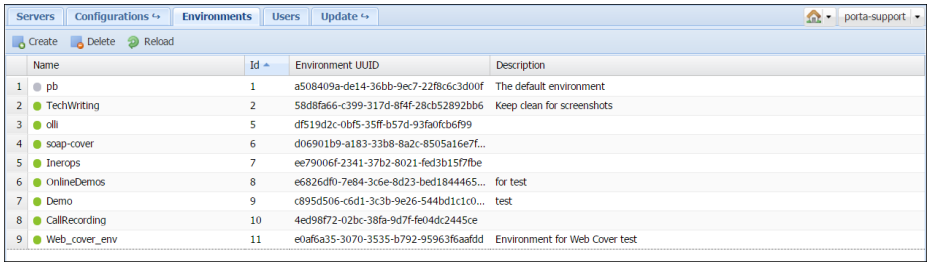
There is also extended **Search** functionality inside each configuration tree that allows you to make a search by the option's name or value, or the name of the instance. Start by simply entering the target value to see all the possible variants.



Environments

On this page you can manage virtual environments.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



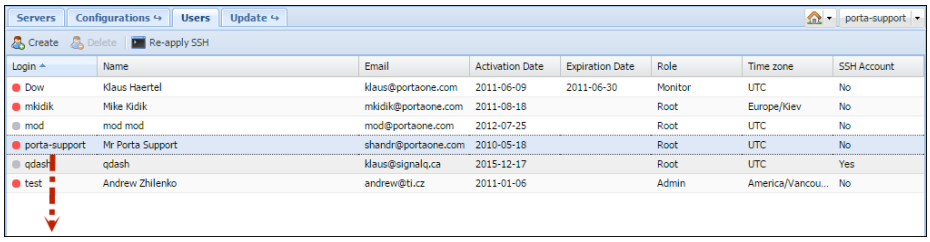
	Name	Id	Environment UUID	Description
1	pb	1	a508409a-de14-36bb-9ec7-22f8c6c3d00f	The default environment
2	TechWriting	2	58d8fa66-c399-317d-8f4f-28cb52892bb6	Keep clean for screenshots
3	olli	5	df519d2c-0bf5-35ff-b57d-93fa0fcb6f99	
4	soap-cover	6	d06901b9-a183-33b8-8a2c-8505a16e7f...	
5	Inerops	7	ee79006f-2341-37b2-8021-fed3b15f7fbe	
6	OnlineDemos	8	e6826df0-7e84-3c6e-8d23-bed1844465...	for test
7	Demo	9	c895d506-c6d1-3c3b-9e26-544bd1c1c0...	test
8	CallRecording	10	4ed98f72-02bc-38fa-9d7f-fe04dc2445ce	
9	Web_cover_env	11	e0af6a35-3070-3535-b792-95963f6aafdd	Environment for Web Cover test

Field	Description
Name	The name of the environment.
ID	The internal ID of the environment.
Environment UUID	The unique ID of the environment. It is not editable and remains intact even if the environment name is changed.
Description	A short description of the environment. This field is not mandatory.

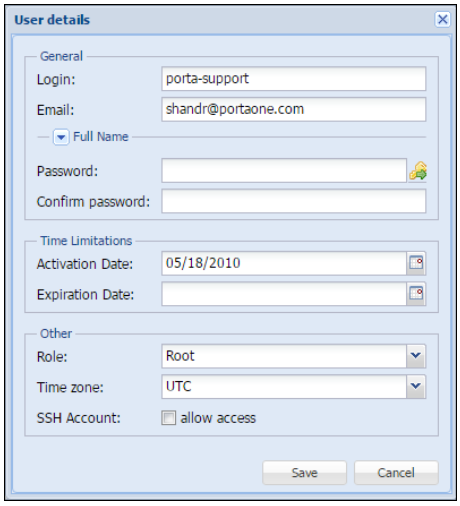
NOTE: Only users with Root and Admin roles can create and delete environments.

Users

This tab is for editing information about users who have access to the Configuration server. To edit, simply double-click on the particular user:



Login	Name	Email	Activation Date	Expiration Date	Role	Time zone	SSH Account
Dow	Klaus Haertel	klaus@portaone.com	2011-06-09	2011-06-30	Monitor	UTC	No
mkidik	Mike Kidik	mkidik@portaone.com	2011-08-18		Root	Europe/Kiev	No
mod	mod mod	mod@portaone.com	2012-07-25		Root	UTC	No
porta-support	Mr Porta Support	shandr@portaone.com	2010-05-18		Root	UTC	No
qdash	qdash	klaus@signalq.ca	2015-12-17		Root	UTC	Yes
test	Andrew Zhilenko	andrew@ti.cz	2011-01-06		Admin	America/Vancou...	No



© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Field	Description
Status	The status of the user: when the button is red, the user is offline; when it is green, the user is online.
Login	Shows which name the user is logged in with.
Email	The email address of the user.
Salutation	Defines which greeting will appear to the user (e.g. Mr., Ms., Mrs., etc.).
First Name	The first name of the user.
Middle	The middle name of the user.
Last Name	The last name of the user.
Password	Allows you to change the password for this user. By clicking the **Auto-generate** icon, a random password is generated.
Confirm password	Repeat the password defined for this user.
Activation Date	The date when the user was activated.
Expiration Date	The date when the user's rights will expire.
Role	Shows the user's role: • **Root** provides access to all options and tabs. • **Admin** provides access only to the **Servers** and **Configurations** tabs. • **Read-only** users have access to all the same tabs as Root, but cannot make changes. • **Monitor** only gives access to the monitoring system web interface via the **Monitor** button.
Time Zone	The time zone in which the user is operating.
SSH Account	Indicates whether the user is allowed to log in to servers in the current installation by using SSH.

You can create and delete users using the **Create** and **Delete** buttons, respectively.

NOTE: The user will be able to log in only after the activation date. Likewise, the user will not be able to log in after the expiration date.

The **Re-apply SSH** button allows the creation / recreation of UNIX accounts on all servers for the selected user. This allows the user to log in to servers in the current installation by using SSH, which is required if this user was initially created without SSH access – or if new servers were added to the installation.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Update

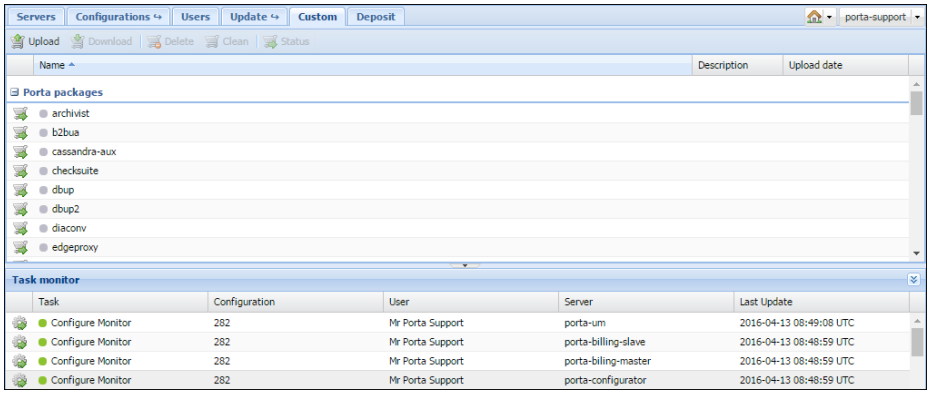
The update is performed via the Configuration server. If you wish to update your system, please contact the PortaOne support team at **support@portaone.com**, who will provide you with further assistance.

Custom

This tab allows you to manage custom software and patches on your servers. When entering this tab you see the list of RPM packages. It is divided into two groups:

- **Porta packages** – list of all PortaOne RPM packages
- **Third-party packages** – already installed third-party RPM packages

An indicator on the left of the package name shows whether it contains patches (green light), does not contain patches (grey light) or cannot contain patches (red light).



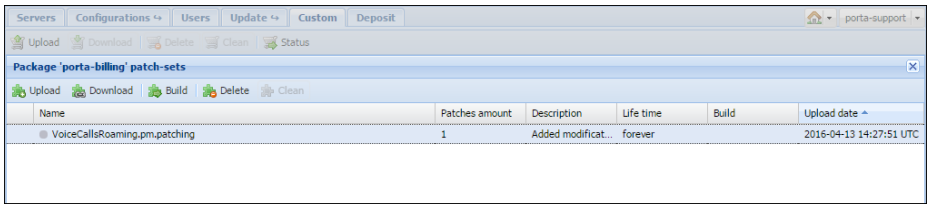
The **Custom** tab provides the following activities:

Field	Description
Upload	Uploads new third-party RPM package.
Download	Downloads third-party RPM package from the server.
Delete	Removes selected RPM package from the repository. This option is only active for third-party RPM packages.
Clean	Removes all patches from the selected RPM package.
Status	Shows status and version of RPM package on all servers within the installation.

If a PortaOne RPM package is patched, its name appears bold in the list.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

When clicking the icon on the left of the desired package, the **Patches** block opens. This block will contain the list of all patches if they are already uploaded for a particular RPM package.



A patch can have one of three kinds of status:

- **New** (grey indicator) – a patch was uploaded and has or has not been used before
- **Applied** (green indicator) – a patch is currently applied to the RPM package. Click the icon to view logs. Note that patched RPM must be installed to become effective
- **Error** (red indicator) – the application of a patch has failed. Click the icon to view logs

The **Patches** block provides the following activities:

Field	Description
Upload	Uploads a new patch file. You will see a pop-up window where you should choose the file to upload, enter a description and specify a **Lifetime** and **Source code** for a patch.
Download	Downloads a patch from the server.
Build	Rebuilds the selected RPM package with the uploaded patch included. Note that changes won't become effective immediately – the patched RPM must be installed to take effect. For more information see the *Patch upload* section below.
Delete	Removes the patch from the list. **NOTE:** It is prohibited to delete a patch while in an "Applied" state. To remove it, clean the patched RPM package first.
Clean	Removes selected patch from the RPM package or resets error status. Note that changes won't become effective immediately – the patched RPM must be uninstalled for the original RPM to take effect. For more information, see the *Patch upload* section below.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Patch's LifeTime

Every uploaded patch has a lifetime parameter. This means the "finish date" for an RPM package or patch propagation.

Why specify a lifetime for a patch

When you modify a PortaOne package, you are actually applying patches on top of an underlying PortaOne code. Since PortaOne developers always work on improving code and adding new functionalities, the software (packages and files they contain) changes with every new release. To make sure that your custom patches are up-to-date after a software upgrade to a new release, you will *always* need to sync your custom patches with the updated underlying code, and fix any hunks in your patches that no longer apply. This is called *rebasing* your custom patches. By setting a specific lifetime for your custom patches, you ensure that the patch will not be applied to a new release where it hasn't yet been tested by your team. Another example might be when a patch is only applied to certain releases or builds, because in later releases, it loses its viability.

How to use the lifetime of a patch

The lifetime parameter permits the specification of specific software releases and builds. An RPM for a new version with a patch included will automatically be rebuilt and installed (during the PortaSwitch® update procedure).

There can be several patches with different (or the same) lifetimes for one package but only one of them can be active. If there is an active patch (included in a successfully built RPM package) and a new RPM package with another patch has been successfully built, the latter patch becomes active and the former patch becomes "new" (the RPM package with the former patch is removed from the repository).

Lifetime can be one of the following:

- Forever – An RPM package with custom patch included will automatically be rebuilt and installed during every PortaSwitch® update procedure. In case of failure, the PortaOne support team will notify you about the error.
- Release – An RPM package with custom patch included will automatically be rebuilt and installed during a PortaSwitch® update to any build within a specific release.
- Build – An RPM package with custom patch included will automatically be rebuilt and installed during a PortaSwitch® update to a specific build ONLY.

You can specify a Source code for building an RPM package. It can be one of the following:

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

- Latest – defined by active configuration (e.g. latest hotfix for current build).
- Strict – user defined build string (e.g. "39.0-2.20101213" – source RPM package for MR39-0-1-be).

Note that the above feature is mainly used by the PortaOne support team to manage available hotfixes for a specific RPM package. If you need the list of available build strings, please contact the PortaOne support team at **support@portaone.com**.

In case of a strict build, its string is displayed in brackets in the **Life time** column of the patches list.

Note that for patched PortaOne packages as well as new third-party packages to take effect, they must be installed via a software upgrade (as a separate operation or as part of a PortaSwitch® update procedure). For more information, see the *Patch upload* section below.

Patch Application to an RPM Package

When you introduce changes, either to PortaOne packages or to third-party ones, you want the changes to remain effective after the software upgrade procedure. To do this it is necessary to prepare a custom patch (a file that describes the differences between the original and modified files) and upload it to the **Custom** tab. Below you will find step-by-step instructions on how to create and apply a custom patch and helpful hints on how to ensure that it works with the new software release.

Note: We encourage you to review your custom patches before the software upgrade to make sure that they can be applied to the updated software in a new release. This is the responsibility of the customer to fix any hunks in the patches that no longer apply.

Patch preparation

To prepare a patch we use a standard "diff" Linux command that makes a line-by-line comparison between the original and modified files and shows the difference in a specific format. Let's consider this example of patching the /home/porta-billing/site_lib/Porta/Modules/VoiceCallsRoaming.pm file if changes were introduced into this module file and the custom modified file was saved as /home/porta-one/VoiceCallsRoaming.pm.patched:

Follow these steps to prepare a patch with your custom modifications. Please note that you will need to run some of these commands with root-level privileges (e.g. use the `sudo` command):

1. Go to the directory where the original file is located:
   `cd /home/porta-billing/site_lib/Porta/Modules`

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

2. Rename the *original* file to VoiceCallsRoaming.pm.orig, and your *custom modified* file to VoiceCallsRoaming.pm:
```
mv VoiceCallsRoaming.pm /home/porta-one/VoiceCallsRoaming.pm.orig
mv VoiceCallsRoaming.pm.patched VoiceCallsRoaming.pm
```

3. Find the name of the RPM that contains the file. The patch must be applied to this very RPM:
```
rpm -qf VoiceCallsRoaming.pm
```

4. The command will have the following output:
`porta-billing-38.0-3.20131215.el6.noarch`, where "`porta-billing`" is the name of the RPM and `38.0-3.20131215` is the build string

   Go to the SRPM (Source RPM) package root folder (See **Appendix B** for the most useful SRPM packages):
```
cd /home/porta-billing/
```
   Now you are in the `/home/porta-billing/` folder

5. Create a patch using this single command:
```
diff -Nau /home/porta-one/VoiceCallsRoaming.pm.orig site_lib/Porta/Modules/VoiceCallsRoaming.pm > /var/tmp/VoiceCallsRoaming.pm.patch
```

6. Check that the patch was created correctly and that it only contains required modifications:
```
less /var/tmp/VoiceCallsRoaming.pm.patch
```

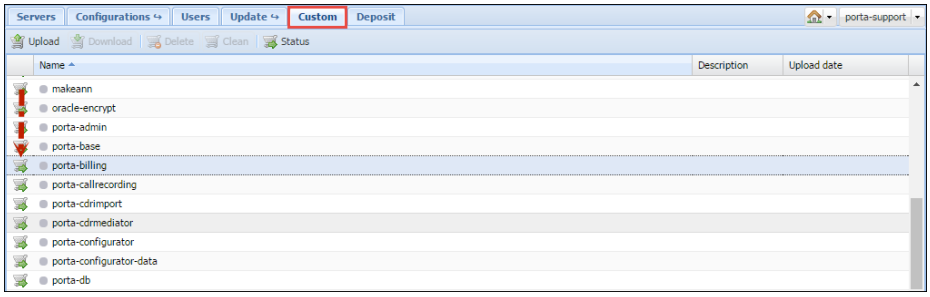
7. Download this file (`/var/tmp/VoiceCallsRoaming.pm.patch`) to your local PC (if you use Windows OS you may use a program like WinSCP for this)

Patch upload

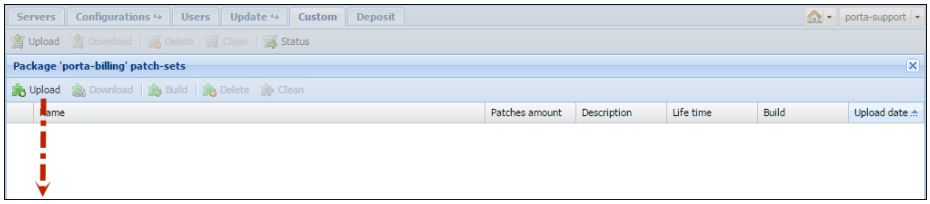
Upload the patch to the **Custom** tab for the 'porta-billing' RPM package and try to rebuild it:

1. Log in to the Configuration server web interface and go to the **Update→Custom** tab. On this tab, select which RPM package to apply the patch to.
2. Click the icon on the left of the desired package to open its **Patches** block.

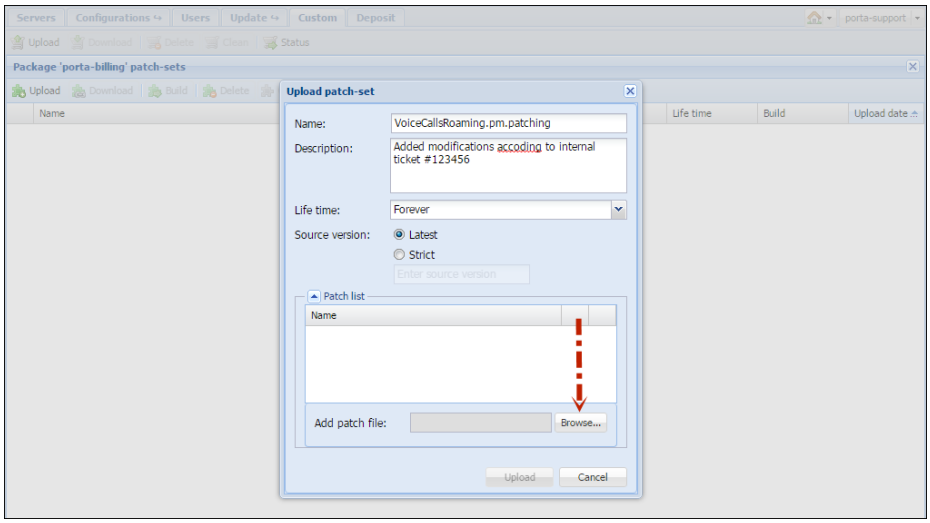
© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



3. Click **Upload**.

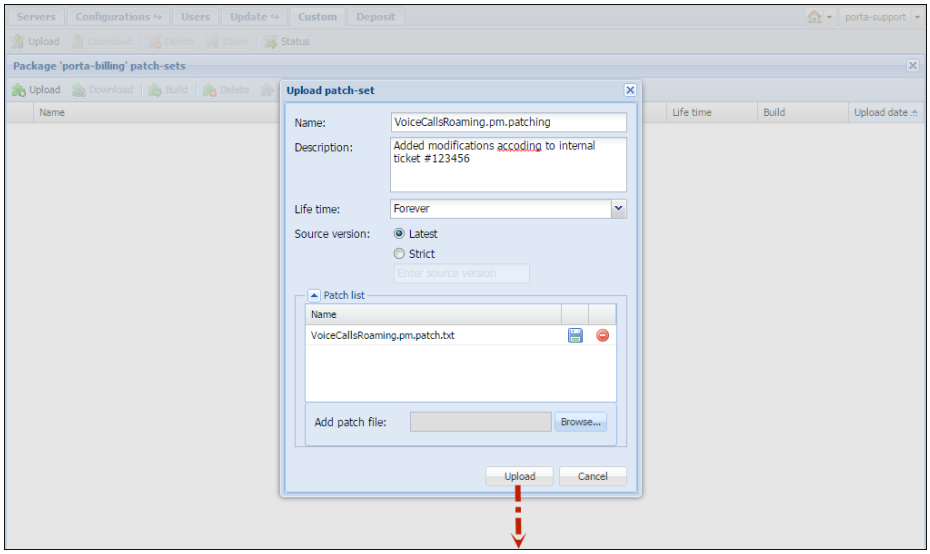


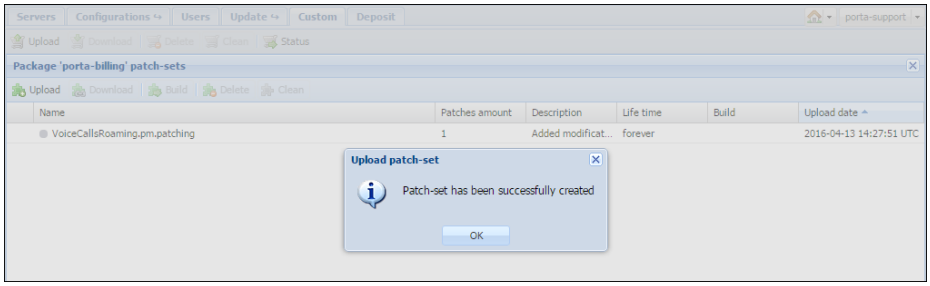
4. Specify the patch name and select the patch file to add it to the list.



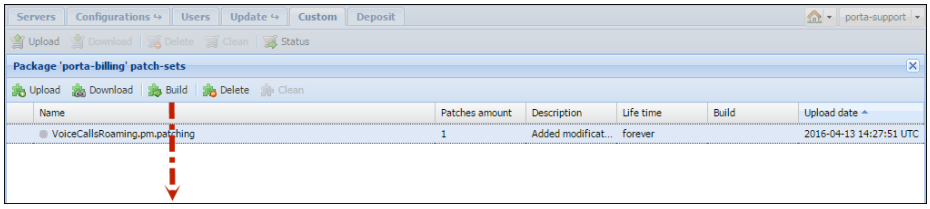
5. When the patch has been added click the **Upload** button.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

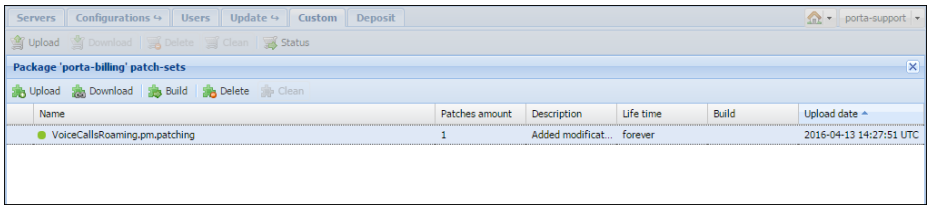




6. Click the **Build** button to rebuild the RPM package with the uploaded patch included.



7. If the RPM package with the patch has been rebuilt successfully, you will see the green indicator in the patch **Name** column. If the indicator is red, then the RPM hasn't been rebuilt with this patch and you can click the icon to find the reason in the logs.



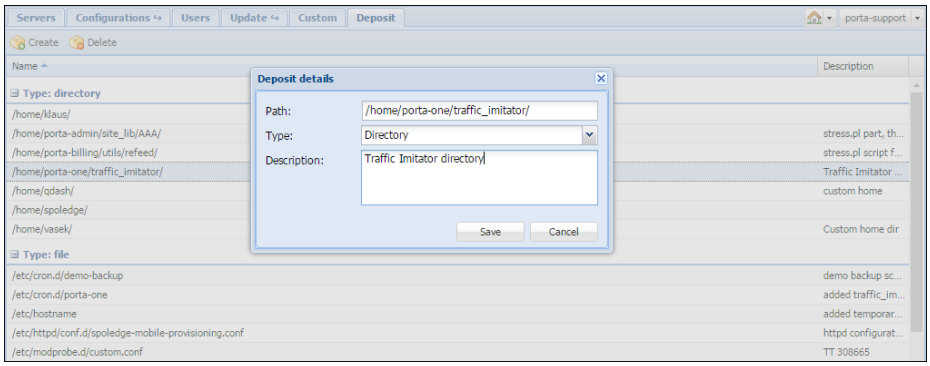
8. Now the patched PortaOne package can be installed via the software upgrade (as a separate operation or as part of a

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

PortaSwitch® update procedure). If you wish to install a newly built package, please contact the PortaOne support team at **support@portaone.com**, who will provide you with further assistance.

Deposit

This tab allows you to create a list of custom files (e.g. sudo configuration files) and directories that should remain on your servers during the software upgrade.

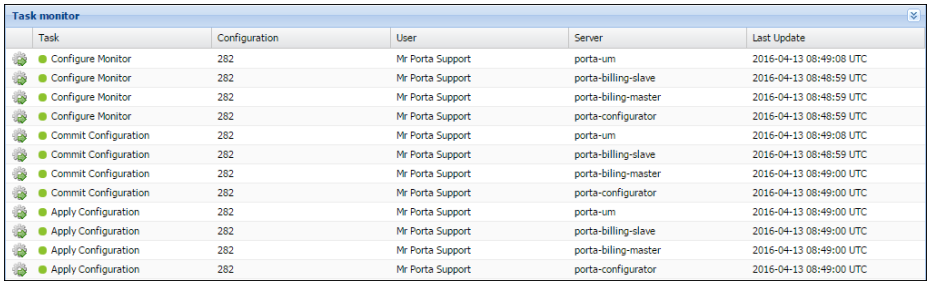


When the system is being prepared for a software upgrade to a new release, the files are automatically copied to the partition where the new version of the code is installed, and therefore appear on the production partition after the software upgrade.

Note that files and folders specified on the **Deposit** page *don't* become duplicated; they will be taken directly from specified folders during a software upgrade. Therefore, all changes made to these files after adding them on the **Deposit** page (including removal) will be preserved. For example, if files are physically deleted from the file system, they will be lost despite the fact that they were added on the **Deposit** page.

Task Monitor

Using this tab, you can view information about how configuration changes are applied to the system.



Task monitor

Task	Configuration	User	Server	Last Update
Configure Monitor	282	Mr Porta Support	porta-um	2016-04-13 08:49:08 UTC
Configure Monitor	282	Mr Porta Support	porta-billing-slave	2016-04-13 08:48:59 UTC
Configure Monitor	282	Mr Porta Support	porta-biling-master	2016-04-13 08:48:59 UTC
Configure Monitor	282	Mr Porta Support	porta-configurator	2016-04-13 08:48:59 UTC
Commit Configuration	282	Mr Porta Support	porta-um	2016-04-13 08:49:08 UTC
Commit Configuration	282	Mr Porta Support	porta-billing-slave	2016-04-13 08:48:59 UTC
Commit Configuration	282	Mr Porta Support	porta-biling-master	2016-04-13 08:49:00 UTC
Commit Configuration	282	Mr Porta Support	porta-configurator	2016-04-13 08:49:00 UTC
Apply Configuration	282	Mr Porta Support	porta-um	2016-04-13 08:49:00 UTC
Apply Configuration	282	Mr Porta Support	porta-billing-slave	2016-04-13 08:49:00 UTC
Apply Configuration	282	Mr Porta Support	porta-biling-master	2016-04-13 08:49:00 UTC
Apply Configuration	282	Mr Porta Support	porta-configurator	2016-04-13 08:49:00 UTC

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Field	Description
Task	Shows the type of action performed, e.g. "Apply Configuration."
Configuration	Shows the configuration that was used.
User	Shows who performed the task.
Server	The server where the task was performed.
Last Update	The time when the information about the performed action was updated.
State Indicator	Indicates the state of the task: • A **grey** button – The task has started. • A **yellow** button – The task is being performed. • A **green** button – The task has been performed successfully. • A **red** button – Errors have been detected during task execution. Check logs to obtain additional information.

You can also see the log of applied configurations by clicking the icon.

At the bottom of the page, below the **Task monitor**, you can see the page related options. You can go to the next page or the previous one, jump to the first or last page, or use the **Refresh** button to update any of the pages.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

3. Initial Configuration of PortaSwitch®

Once you have installed the software on the servers, you have a blank system which can be configured in various ways to meet your business requirements. The Configuration server allows you to specify a role or even a set of roles to be assigned to each server. This chapter will demonstrate how to set up the initial configuration of the system.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Checklist

Print the following page and perform the system setup by following the instructions, using them to check off the operations you complete. Please be sure to perform all of the operations (all of the boxes should be checked); otherwise the system will not work as desired.

Operation	Done
Add servers	[ ]
Create configuration	[ ]
** Add main instances*	[ ]
Add three Cassandra instances	[ ]
Add MasterDB instance	[ ]
Apply the configuration	[ ]
Add StandByDB instance (optional)	[ ]
Apply the configuration	[ ]
Add ReplicaDB instance	[ ]
Apply the configuration	[ ]
Add BillingEngine instance	[ ]
Add Admin instance	[ ]
**** Add a SIP cluster and define its virtual IP address	[ ]
***** Add two DispatchingNode instances	[ ]
Add two ProcessingNode instances	[ ]
Add VoiceMailDB instance	[ ]
Add Elasticsearch instance	[ ]
Add LogServer instance	[ ]
Add additional instances (optional)	
Add RTDB instance	[ ]
Add RT instance	[ ]
Add CallRecording instance	[ ]
Create Auxiliaries such as SMSTrigger, STUN Server and / or XDRImport	[ ]
Apply the configuration	[ ]
Create new billing environments as needed	[ ]

*** Adding the main instances should be performed in the foregoing order.
**** Virtual IP address can only be an address that is not assigned to any instance or server as the service IP.
***** DispatchingNode instances must each be added on their own physical servers.

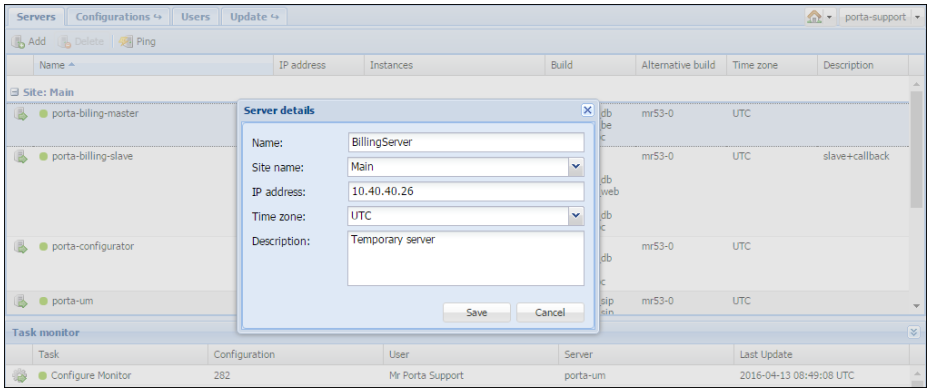
We recommend that you follow all the above steps in the suggested order in order to avoid issues during configuration. Some components may have external prerequisites that must be satisfied in order to be configured properly. For instance, to correctly set up database replication, the **MasterDB** must be configured before the **ReplicaDB**.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Add Servers

Adding servers is the first step of your initial system configuration (depending on your specific type of installation, the number of servers can vary).

1. Go to the **Servers** tab.
2. Click the **Add** button on the toolbar, and fill in the fields in the **Server details** dialog box:



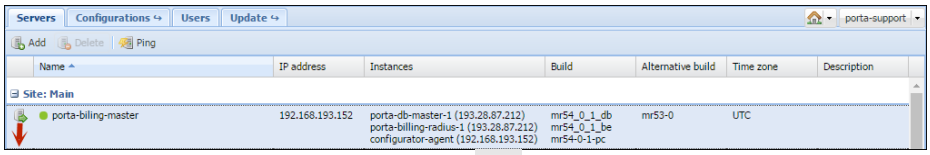
NOTE: When adding a server to the installation on this page an IP is specified. This IP is automatically considered internal so it and its NIC become read-only in Network configuration UI.

3. Click **Save**.

Add IP Addresses

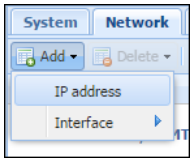
Once you have added servers, you can add public IP addresses that will be assigned to the particular instances in the later steps of the PortaSwitch® configuration.

1. On the **Servers** tab, choose the server for which you wish to add a public IP address, and click **Change server configuration**.

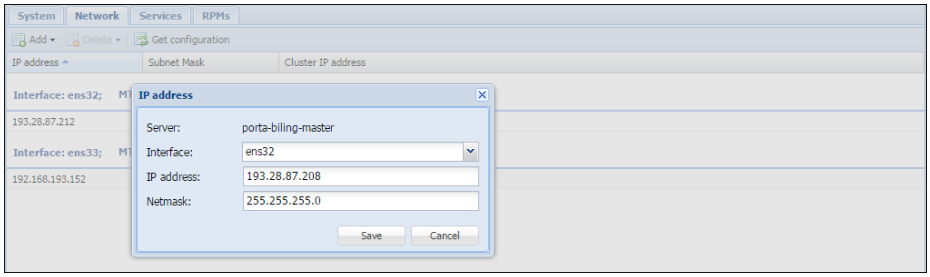


2. Go to the **Network** tab, click **Add**, and choose **IP address**.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



3. In the **IP address** dialog box, specify the following information:
   - **Interface** – You can select only public interface here
   - **IP address**
   - **Netmask**



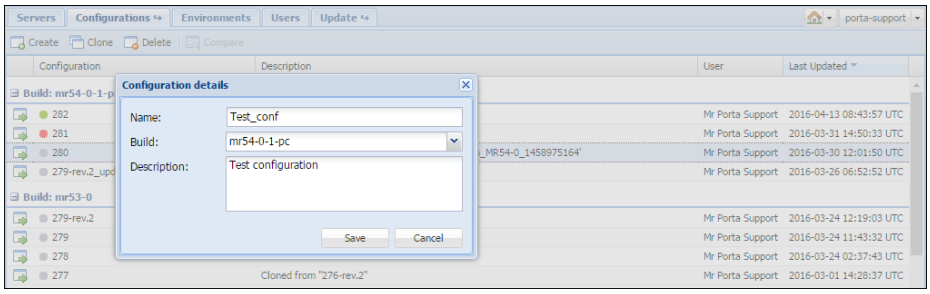
4. Click **Save**.

In case you want to run several service instances on one physical server, you need to first associate the additional IP addresses with the public network interface of the server (this process is called "IP aliasing"). To do this, repeat steps 1–4, and specify the required IP alias in step 3.

Create a Configuration

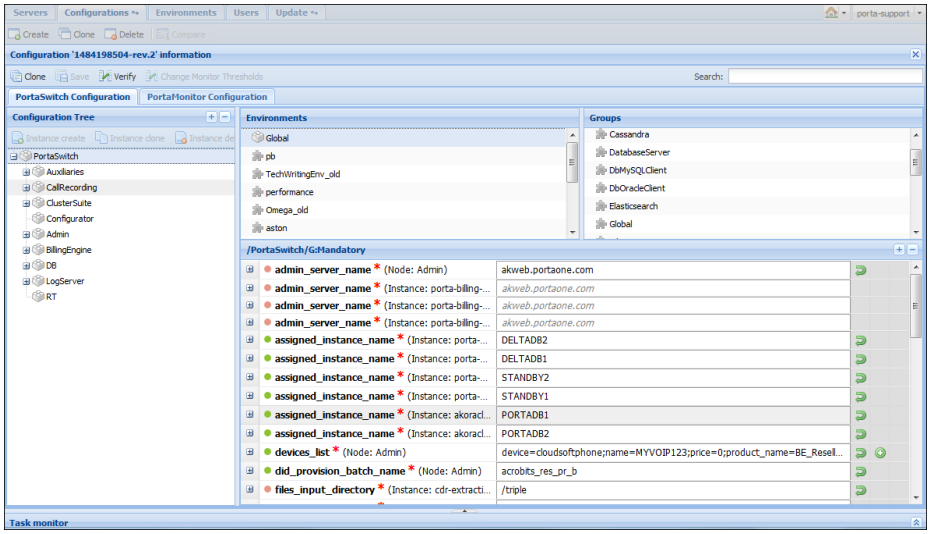
After you have added all the required servers, go to the **Configurations** tab. Here you can create a configuration to fit your needs.

To create one, press the **Create** button and then specify its name and description and choose which software version it applies to.



You will see a Configuration Tree, Environments, Groups panels, and the panel where all the information about a given service is shown.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



Add Instances

Keep in mind when adding an instance

Interaction specifics

When adding instances, keep in mind the following idiosyncrasies of their interaction:

- If there are two or more instances that depend on the Apache web server (at the moment these are: **Admin**, **SMSTrigger**, **RT**), they must be configured with different IP addresses ('service IP') or ports. Otherwise, the Configuration server will display warnings during the configuration check and the configuration will not be applied.

- In order to keep the system working efficiently do *not,* under any circumstances, put the following instances on the same server:
    - MasterDB and ReplicaDB
    - BillingEngine and LogServer

Instances necessary for a secondary site

Note that for a secondary site to provide all the necessary services in standalone mode, the following minimum set of instances must be configured on it:

- **BillingEngine** – This instance calculates applicable charges according to product, tariff and other billing parameters.
- PortaSIP Cluster instances: one **Dispatching Node** and one **Processing Node** – Each of these instances is necessary for voice termination, transmission of instant messages, and Media Server

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

functionality. These instances are not required if you do not provide any of these services (for example, if you exclusively provide Internet access).

- **OracleDB** or **StandByDB** (depending on what type of database you use, Oracle or MySQL) – StandByDB is an actual replica of the MasterDB, and as such, provides all the information about existing accounts, products, service configuration, etc. when the MasterDB is unavailable. Note that new xDRs are stored in the special database with deltas, whose instance you do not need to add independently. When the primary site becomes available again, information from the database with deltas will be synchronized into the MasterDB.
  For Oracle the procedure is similar, but in this case a database administrator manually defines which OracleDB instance will be for the "master" database, which for "standby" and which for "database with deltas."
- **PortaAdmin** – While the web interface is not available in standalone mode, this instance also runs apache services which are responsible for the callback feature and several other IVRs, and XML / JSON API access. Configure this instance if you require such functionality in standalone mode.
- **LogServer** – This instance is responsible for storing BE logs and together with Elasticsearch, for storing SIP logs.
- **Elasticsearch** with the **with_indices** option set to **logs** – Together with LogServer this instance is responsible for storing SIP logs.

Note that Media Server functionality and XML / JSON API access are limited in standalone mode. For more information, please refer to the **PortaSIP Media Applications Guide**, **PortaSIP XML / JSON API Reference Guide** and **PortaBilling XML / JSON API Reference**.

Auxiliary functionality, such as Call Recording, xDR Mediation or Request Tracker system access is unavailable in standalone mode.

How to add all necessary instances

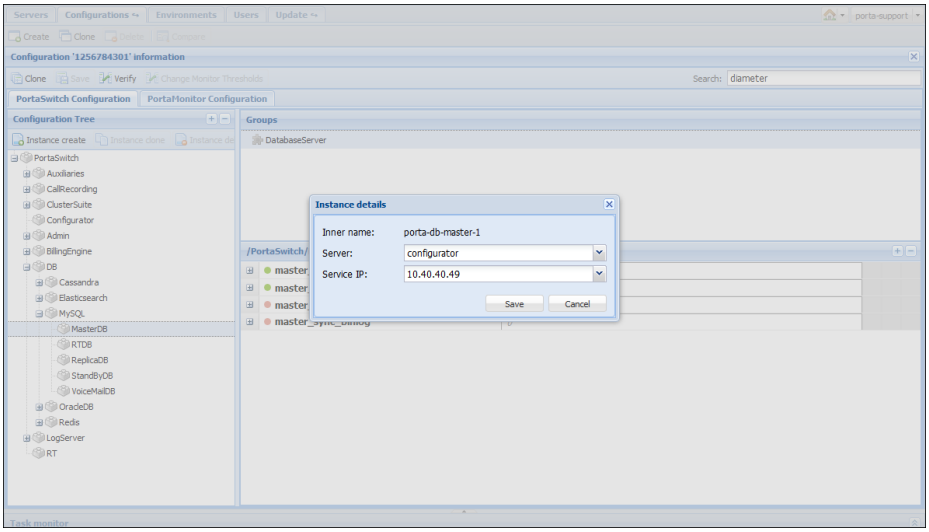
Perform the following steps (using the checklist above to maintain order):

1. From the Configuration Tree, choose DB→Cassandra.

   NOTE: Three Cassandra instances must be added in all. These instances can be created on servers that do not have databases (e.g. Configurator, Admin, PortaSIP, etc.). We suggest that you place these instances on servers with large amounts of RAM and choose internal IP addresses for each of the three Cassandra instances.

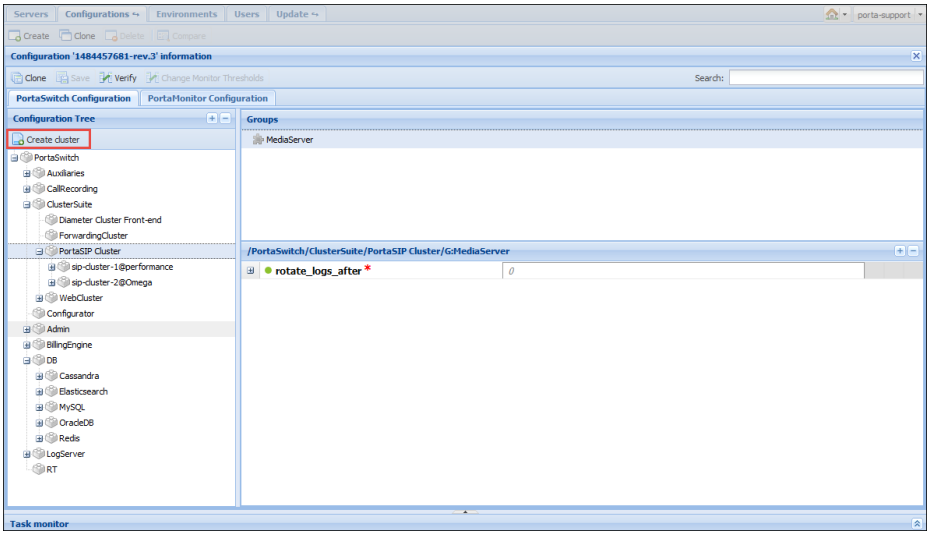
© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

2. Click the **Instance create** button. In the **Instance details** dialog box, choose which server this instance will run on and its service IP, then click **Save**.
3. Repeat steps 1–2 to add two more Cassandra instances on two other servers.
4. From the Configuration Tree, choose DB→MySQL→MasterDB.
5. Click the **Instance create** button. In the **Instance details** dialog box, choose which server this instance will run on and its service IP, then click **Save**.

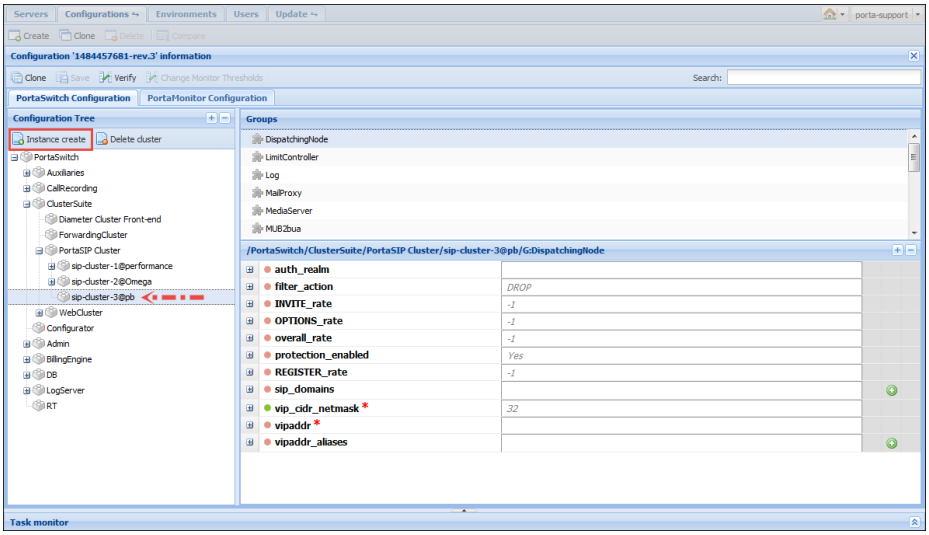


6. Specify all required options.
7. Click **Save**, and then click the **Verify** button.
8. Verify the new configuration and click the **Check / Apply** button to see whether the configuration is valid (e.g. all the required options have values assigned to them). Next click the **Apply** button. As soon as the configuration has been applied, you will see this action displayed on the **Task** page at the bottom of the screen.
9. Clone the applied configuration. To do this, click the **Clone** button on the **Toolbar**.
10. From the Configuration Tree, choose DB→MySQL→ReplicaDB, and click the **Instance create** button. Fill in the fields in the **Instance details** dialog box and click **Save**.
11. Repeat steps 7–8 to finish the process of adding the ReplicaDB instance.
12. From the Configuration Tree, choose BillingEngine. Add the BillingEngine instance as described in steps 5 and 6.
13. From the Configuration Tree, choose Admin. Add the Admin instance as described in steps 5 and 6.

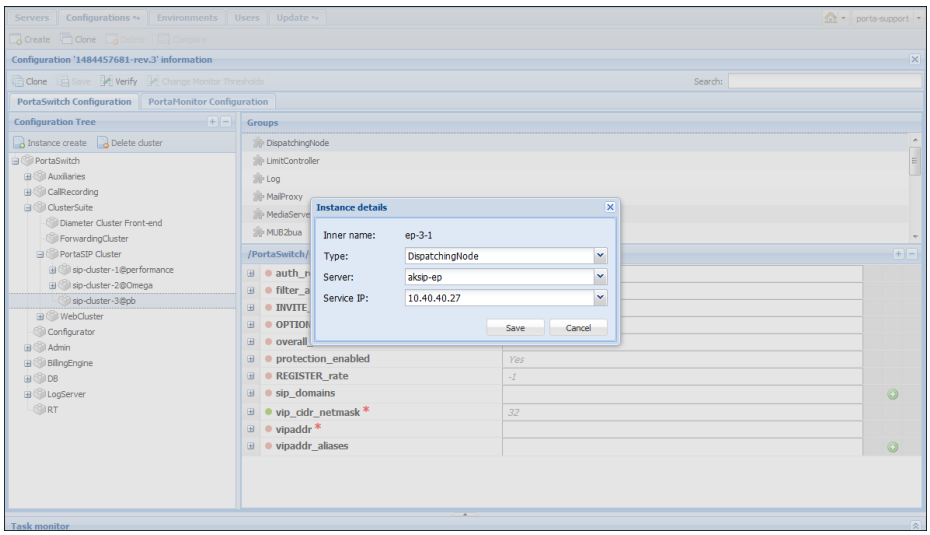
© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



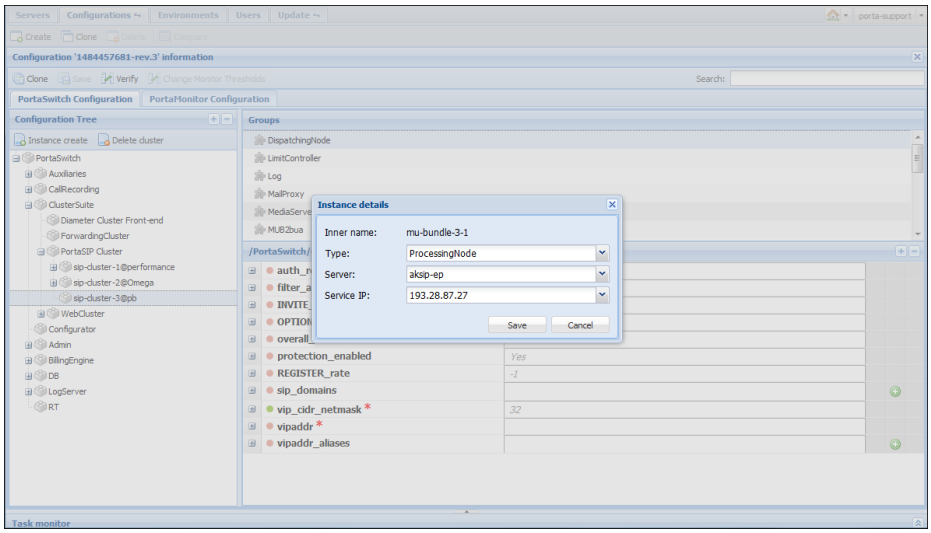
14. From the Configuration Tree choose ClusterSuite→PortaSIP Cluster and then click the **Create cluster** button. In the **Cluster details** dialog box, select the site and the environment the PortaSIP® cluster will be configured for. Click **Save**.
15. Choose the newly created sip cluster and specify its virtual IP address in the **vipaddr** field of the **DispatchingNode** group.
16. Specify the cluster domain name in the **sip_domains** field of the **DispatchingNode** group. The domain name must resolve on the virtual IP address. To add another domain name, click the icon.
17. Specify the domain names for callback and voicemail services in the **callback_domain** and **email_domain** fields of the **Media Server** group. It is recommended that callback and email domain names resolve on the virtual IP address.
18. Click the **Instance create** button. Select the **DispatchingNode** instance type, then select which server this instance will run on and its service IP. Click **Save** to save the instance.



© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



19. Add another DispatchingNode instance by repeating step 17.
20. Choose the desired sip cluster and click the **Instance create** button. Select the **ProcessingNode** instance type, then select which server this instance will run on and its service IP. Click **Save** to save the instance.



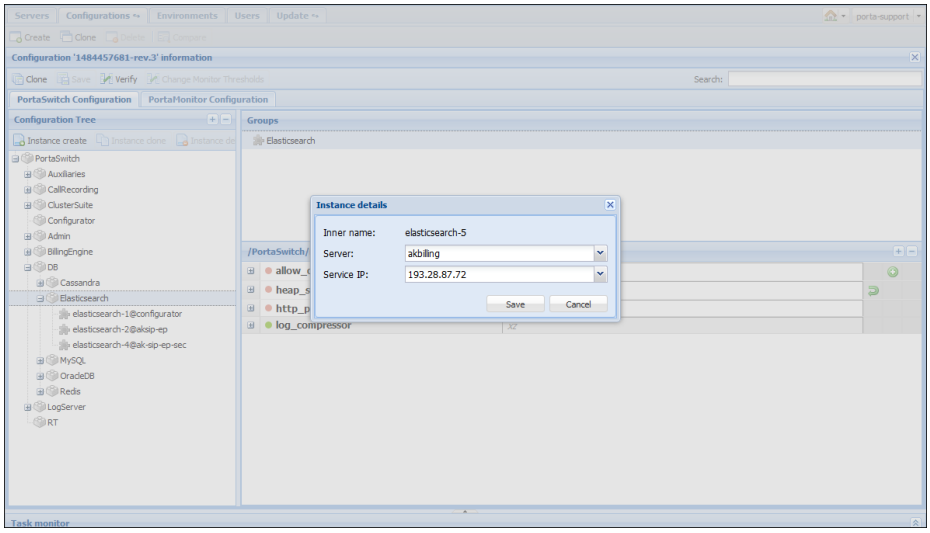
21. Repeat steps 19 to add the desired number of ProcessingNode instances.

NOTE: It is possible to add both a DispatchingNode and a ProcessingNode instance on the same physical server.

22. From the Configuration Tree choose **DB→Elasticsearch** and then click the **Instance create** button. In the **Instance details** dialog box, choose which server this instance will run on and its **service IP**, then click **Save**. Configure the **heap_size** for the

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Elasticsearch instance depending on the available RAM. The recommended heap size value is in the range from 25% to 50% of RAM.



23. Add the LogServer and VoiceMailDB instances just as you did for the previous ones.
24. Add other instances by repeating steps 5–6.

NOTE: While adding additional instances to the configuration make sure that you have specified additional IP addresses on the server's **Network** tab.

25. Make sure you apply the configuration after all the required instances are added and options set.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

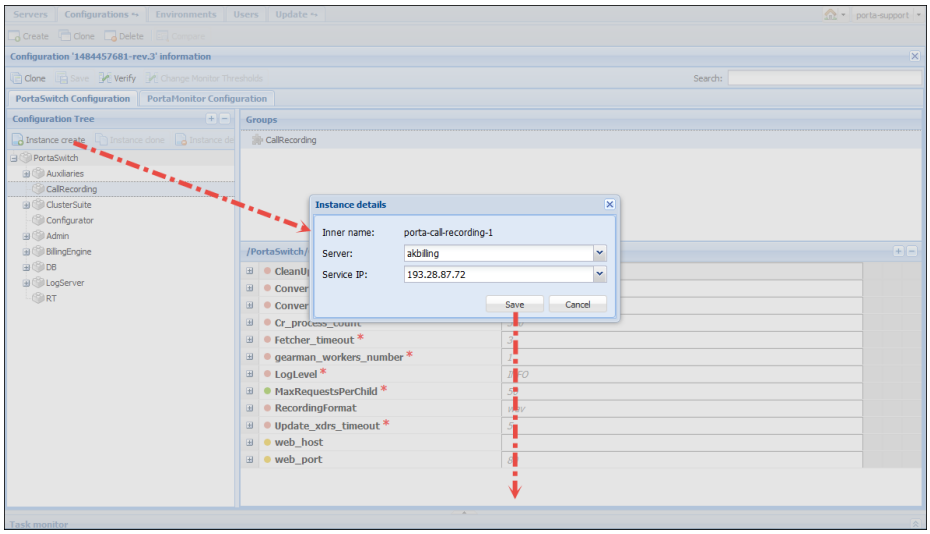
4. How To ...

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

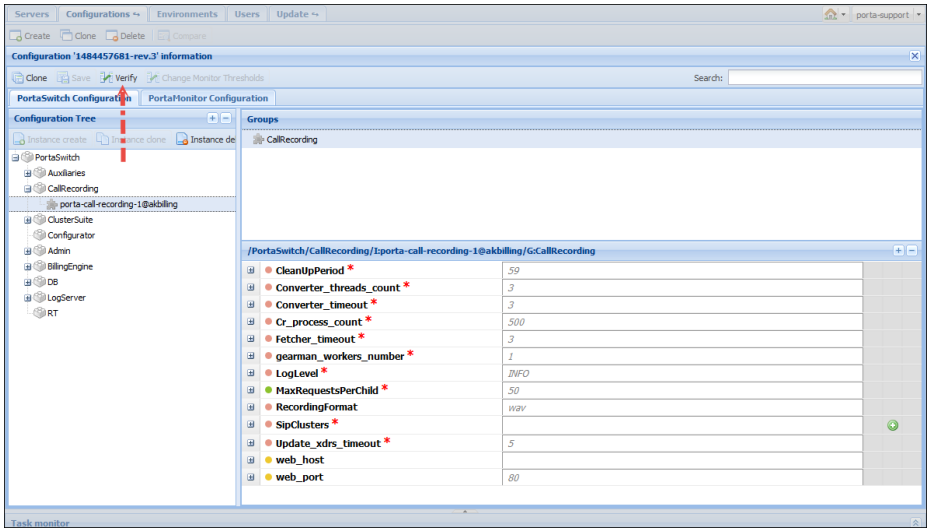
... Change Configuration Options?

At times you may need to change the options within an existing configuration. For instance, you want to have the ability to record phone conversations for an IP Centrex user and to play back the records later. In order to enable the required functions you will need to change your configuration options. This can be done as follows:

1. Go to the **Configurations** tab.
2. Clone the existing configuration by pressing the **Clone** button.
3. In the **Configuration Tree** of the cloned configuration, choose the **CallRecording** node.
4. Click the **Instance Create** button.
5. In the **Instance details** dialog box, select the server on which this instance will run and the service IP, and then click **Save.**
6. Select the newly created CallRecording instance.
7. Define options for the CallRecording instance (CleanUpPeriod, LogLevel, etc.).
8. After all the changes have been made, click the **Verify** button.
8. Verify the new configuration and click the **Check / Apply** button.



© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

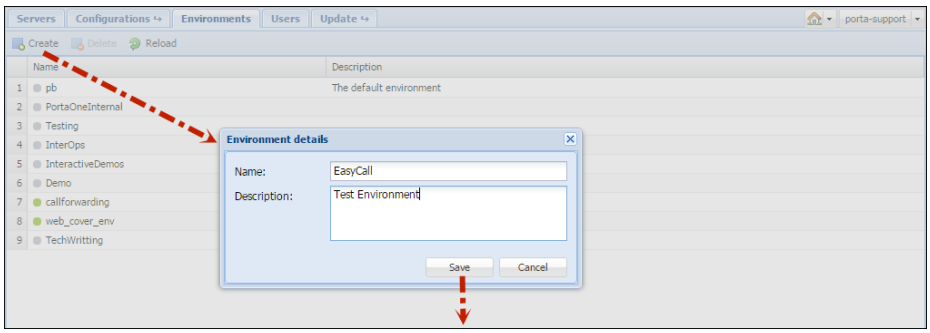


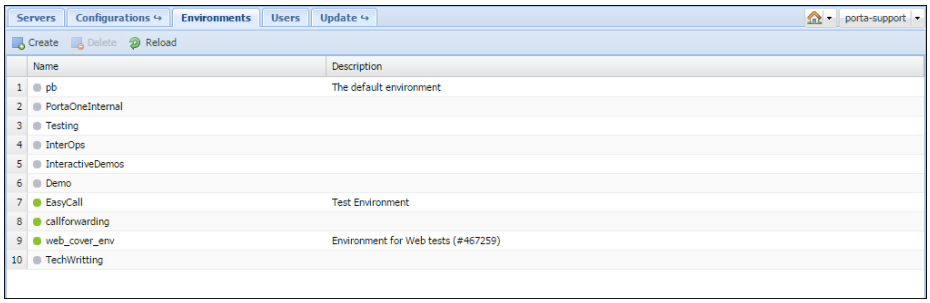
... Create New Billing Environments?

By default, PortaBilling® already contains one billing environment called "pb." This environment is created automatically during the installation of the system. However, you can create additional BE-environments if needed.

In order to create a new environment:

1. Go to the **Environments** tab, and click the **Create** button.
2. In the **Environment details** dialog box, enter the name and description of the future environment, and then click **Save**.





© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

A new environment is created empty, except for a single user account which you will use to login and then create other users, tariffs, customers, and so on. By default, the account's username is <*env*>-root and the password is the same, where <env> is the name of the environment you have just created. So if you create the environment **abc**, to log in to it you will use the username abc-root and the password abc-root.

It is suggested that you change the password after you login for the first time.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

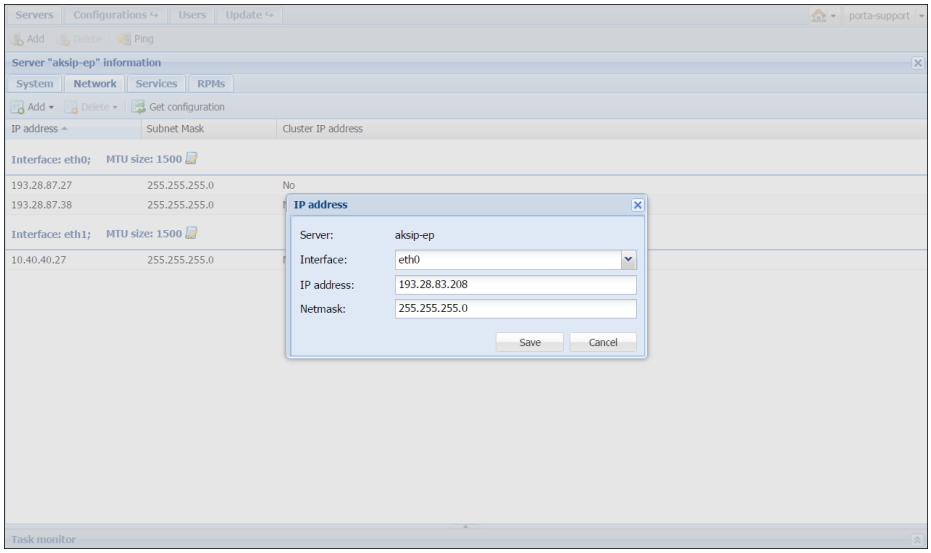
... Configure Several PortaSIP® Clusters in PortaSwitch®?

PortaSwitch® can be partitioned in multiple virtual environments. Each virtual environment will have its own PortaSIP® cluster with a single entry point (the virtual IP address) running on the existing set of servers.

To configure a PortaSIP® cluster on the existing server, you first need to *associate the additional* IP addresses with the public network interface of the server (this process is called "IP aliasing"). Then you can create the cluster instances on said server, assign an individual IP address and associate the billing environment to each of them. It is recommended that on all servers within the set, you add the DispatchingNode instance (it is on standby) for redundancy and the ProcessingNode instance for load distribution.

To deploy a new PortaSIP® cluster, complete the following steps:

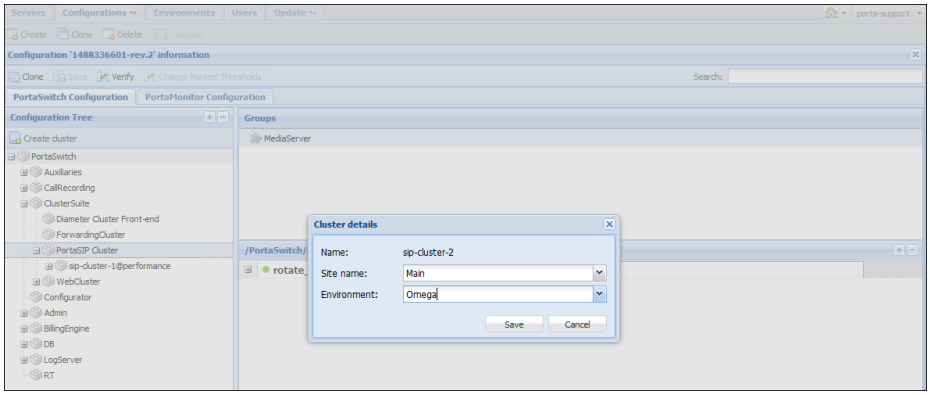
1. On the **Servers** page, select the server where you want to run the cluster DispatchingNode and ProcessingNode instances.
2. Go to the server's **Network** tab and add the appropriate IP address as an alias.



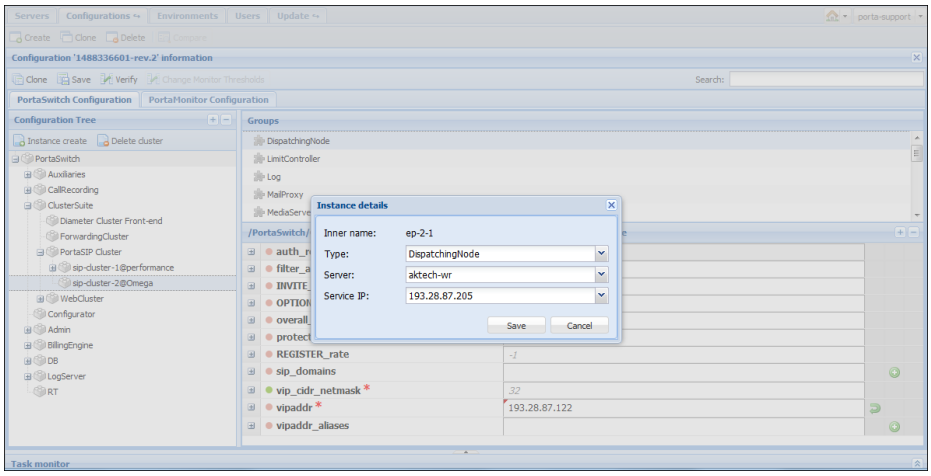
3. Repeat step 2 to add the required number of IP addresses.
4. Repeat steps 1–3 to add IP addresses to another server of your PortaSIP® cluster.
5. Clone the configuration.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

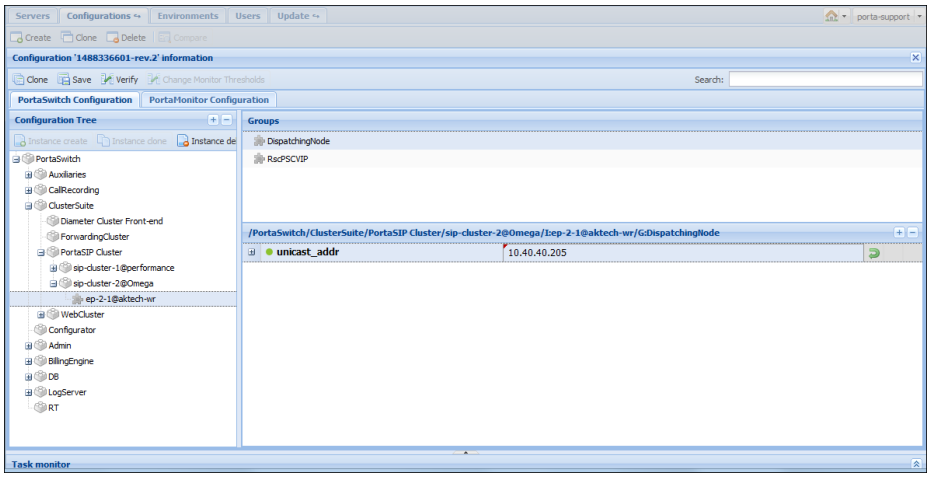
6. In the **Configuration Tree** panel, go to ClusterSuite→PortaSIPCluster→Create cluster and press the **Create cluster** button.
7. In the **Site name** field select the site and in the **Environment** field, specify the billing environment where this instance will run. Then click **Save**.



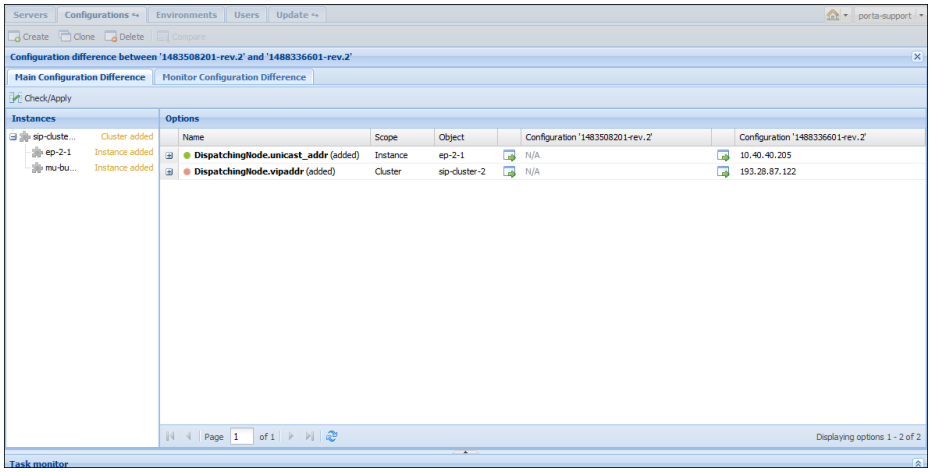
8. Specify the virtual IP address for this sip cluster in the **vipaddr** field of the **DispatchingNode** group.
9. Specify the domain names for callback and voicemail services in the **callback_domain** and **email_domain** fields of the **Media Server** group. It is recommended that callback and email domain names resolve on the virtual IP address.
10. Click the **Instance create** button to create a new dispatching node instance. In the **Type** field select **DispatchingNode**. Then, specify the billing environment where this instance will run and the newly added IP address in the **Instance details** dialog window, then click **Save**.



© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



11. Create a processing node instance. Click the **Instance create** button. Select the **ProcessingNode** instance type, then select which server this instance will run on and its service IP. Click **Save** to save the instance.
12. Repeat steps 6–11 to add DispatchingNode and ProcessingNode instances for another server within your PortaSIP® cluster.
13. After all these changes have been made, click **Save** and then **Verify**.



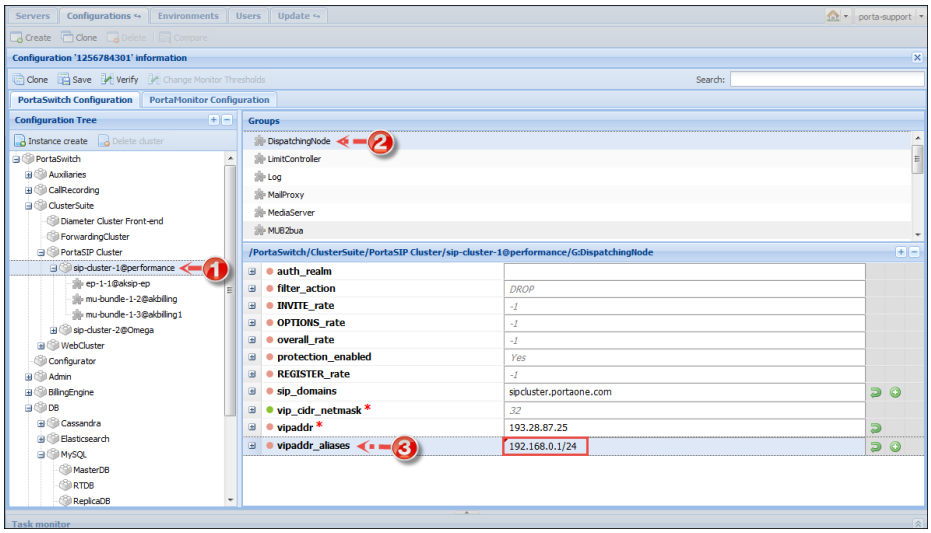
14. Click **Check / Apply** to apply the configuration.
    Create a new PortaSIP® node via the PortaBilling® admin interface.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

... Add an Alias to the PortaSIP® Cluster's IP Address

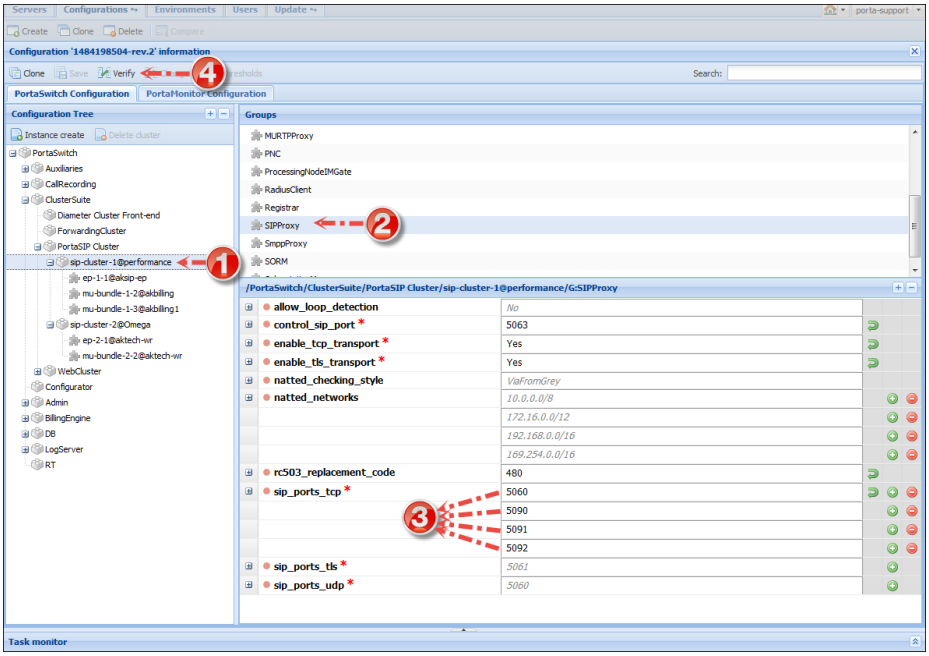
An administrator can assign multiple IP addresses as entry points into the cluster (also known as IP aliases). All of these IPs are shared between dispatching nodes of the cluster in the high-availability mode. This allows seamless migration to PortaSwitch® customers with pre-configured IP phones in case of acquisition. Also using alternative IPs and ports as entry points may help to deliver the service in the countries where standard VoIP may be blocked.

1. Open the **Configurations** tab.
2. Clone the existing configuration by clicking the **Clone** icon.
3. In the **Configuration Tree** of the cloned configuration, select **sip-cluster node**.
4. In the **Groups** panel, select **DispatchingNode**.



5. Select the **vipaddr_aliases** option and type a PortaSIP® cluster's IP alias using the following format: `IP address/CIDR`.
6. Select **SIPProxy** group.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



7. Define additional transport ports for the following protocols: UDP, TCP and TLS. This step is optional and only required if standard transport ports for these protocols are blocked for some reason or cannot be used:
    - Select the **sip_ports_tcp** option and click the **Add value** icon. Type an additional TCP port.
    - Select the **sip_ports_tls** option and click the **Add value** icon. Type an additional TLS port. (The default value is **5061**).
    - Select the **sip_ports_udp** option and click the **Add value** icon. Type an additional UDP port. (The default value is **5060**).

9. After all the changes have been made, click the **Verify** button.
10. Verify the new configuration and click the **Check / Apply** button.

... Migrate an Instance?

The procedure of instance migration is similar for all instance types, although some types have their own particularities. The procedure itself may vary, depending on whether this is a scheduled operation or an urgent recovery after a server failure.

In this chapter we will show you how to migrate an instance from one physical server to another as part of a scheduled operation. We will

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

assume that on a new server you will use a new IP address for the migrated instance.

1. (Optional) Go to the **Servers** page and create a new server.
2. On a target (new) server add a dedicated IP address to be used for the migrated instance.
3. Create a new configuration (referred to as **Configuration A** later on) as a clone of the currently active configuration:
    - Clone the currently active configuration.
    - Delete old instances that are to be migrated from the former server.
    - Save and close this new configuration but *do not* yet apply it.

4. Create another new configuration (referred to as **Configuration B** later on) as a clone of the currently active configuration:
    - Clone the currently active configuration.
    - Modify instances that are to be migrated to the target server:
        - Select the instance and click **Update Instance**.
        - Select a new server on which this instance will run.
        - Specify a new Service IP.
        - Press **OK**.

    - Save and close this new configuration but *do not* yet apply it.
5. Check and apply both new configurations one by one (**note that service downtime is required to apply changes**):
    - Open **Configuration A** and click the Verify button to make sure that it contains all the required changes and that no unwanted options were modified by mistake. Then, click the **Check /Apply** button to verify if the configuration is valid.
    - When the check is done click the **Apply** button.
    - Close C**onfiguration A**.
    - Open C**onfiguration B** and click the **Verify** button to make sure that it contains all the required changes and that no unwanted options were modified by mistake. Then, click the **Check /Apply** button to check if the configuration is valid.
    - When the check is done click the **Apply** button.

The Configuration server will apply the new configurations by performing the following steps:

1. **Configuration A**:
    - New IP addresses will be added to the target server.
    - Instances will be removed from the former server.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

2. **Configuration B**:
    - Instances will be created and started on a target server.

Useful tips

Make sure to consider the following tips:

- Some instance types cannot run from one server (see the **Add Instances** section for more details).
- If the log server is configured, it will continue writing log files for the migrated instance, otherwise new log files will be created on the target server.
- If you have a web cluster then you can migrate web instances one by one without initiating a service outage, otherwise use the **migration plan** above for web instance migration.
- To migrate a DB instance (either Master DB or Replica DB) you need to manually copy the database (e.g. using a snapshot) to a target server and then update the instance using the **migration plan**.

Note that you may want to set up replication from the currently active database to the new one (e.g. configure the *currently active Master DB→New Master DB→Replica DB* replication when the copy process is finished) to keep the services running while the database is being copied. This decreases the services outage time during the migration. If you do this, then do *not* forget to stop the services and the replication just before applying the new configurations.

... Migrate an IP Address?

If you want to re-assign an IP address from a given server or installation to another, you need to complete the IP address migration procedure. It includes the deletion of an IP address from one given server or installation and adding it to another one.

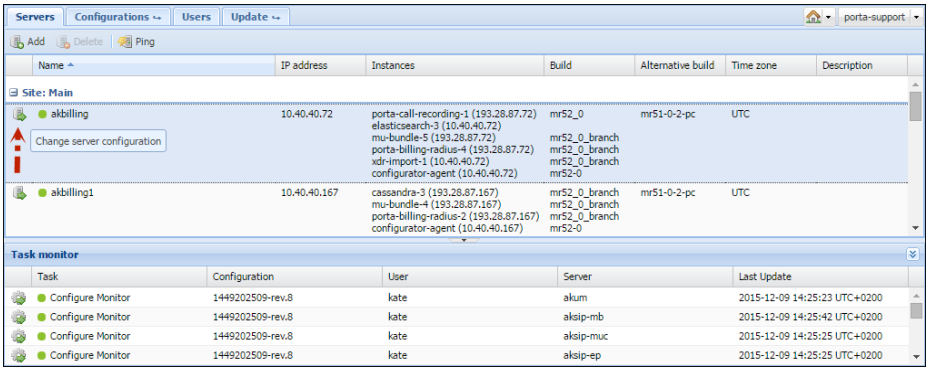
NOTE: Make sure that the IP address you delete is no longer in use. Otherwise the changes will not be applied to the new installation.

How to delete an IP address

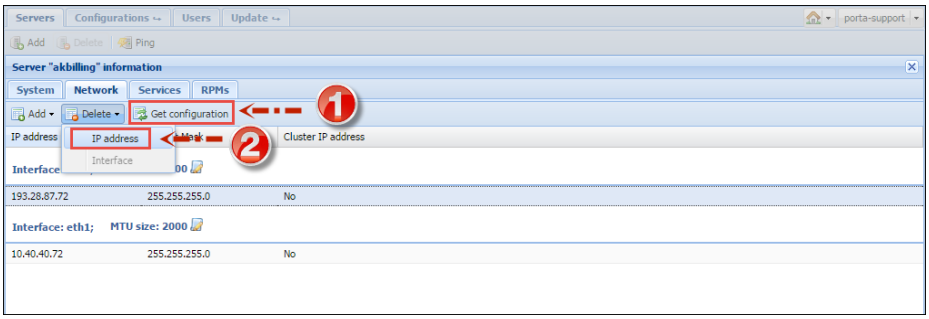
To delete an IP address, complete the following steps:

1. Go to the **Servers** tab.
2. Select the server from which you want to delete an IP address and click on the **Change server configuration** icon on the left-hand side of the server's name.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



3. Click **Get configuration** to update the network configuration.
4. Click on the required IP address. This activates the **Delete** button. Click on **Delete → IP address**. Now the IP address is removed from this server.



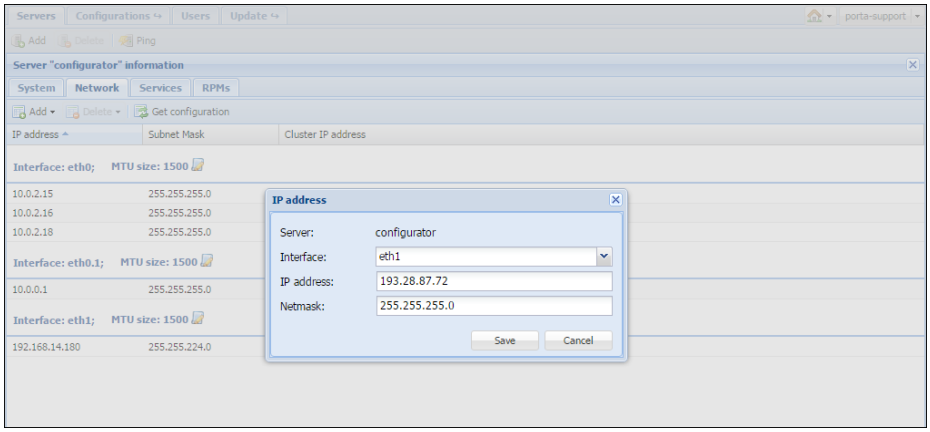
5. Go to the **Configurations** tab.
6. Clone the active configuration and verify the changes. Then, click **Check/Apply** to apply the configuration.

How to add an IP address

To add an IP address to a server, complete the following steps:

1. Go to the **Servers** tab.
2. Select the required server and click on the **Change server configuration** icon on the left-hand side of the server's name.
3. Click **Get configuration** to update the network configuration.
4. Click on **Add → IP address**. In the **IP address** dialog box, specify the following information:
   - **Interface** – Select the required interface from the list.
   - **IP address** – Type in the IP address you want to add.
   - **Netmask** – Type in the netmask for the given IP address.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



5. Click **Save**.
6. Go to the **Configurations** tab.
7. Clone the active configuration and verify the changes. Then, click **Check/Apply** to apply the configuration.

... Configure a MySQL Database White List

To add a new IP address to the MySQL database instance white list, follow these steps:

1. In the **Configuration Tree** panel, choose **DB→MySQL→** *Database Instance Type* **→***Database Instance* (e.g. DB→MySQL→MasterDB→*instance@server*).
2. Under the **allow_connection_from** option, specify the IP addresses you want to add to the white list.

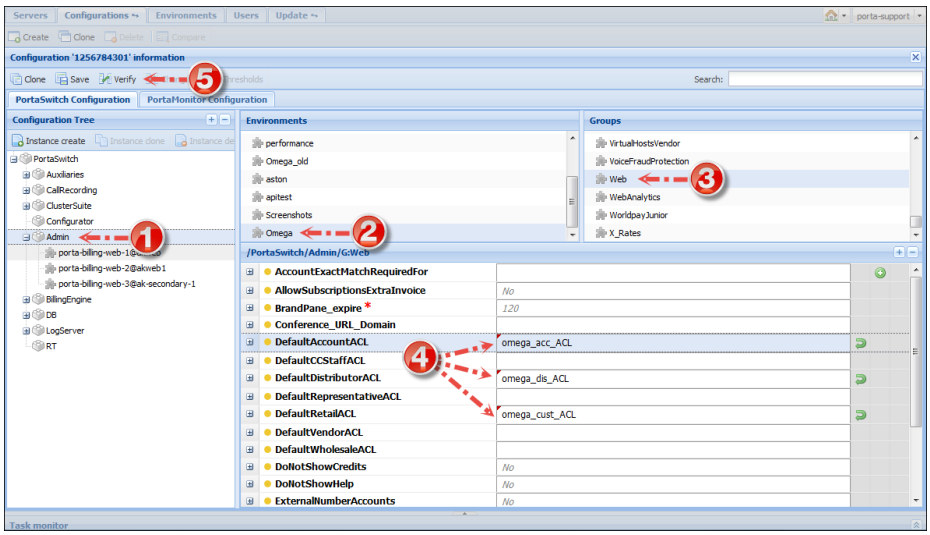
   You can specify as many IP addresses as needed. To do this, add either a single IP address or a block of IP addresses in the CIDR notation format – X.X.X.X/Y (e.g. 192.168.99.0/24).

   Note that all server / service IPs of the **PortaSwitch®** installation are already allowed by default.

Each of your MySQL databases can have its own white list.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

... Define New Default ACLs



1. Clone the current configuration.
2. In the **Configuration Tree**, select the **Admin** node.
3. In the **Environments** panel, select the environment in which you want to override default ACLs.
4. In the **Groups** panel, select **Web**.
5. Define one or more of the following options by typing the names of the ACLs that you created on the PortaBilling® admin interface:
    - **DefaultAccountACL** – Type the name of the account entities ACL.
    - **DefaultCCStaffACL** – Type the name of the CC Staff entities ACL.
    - **DefaultDistributorACL** – Type the name of the distributor entities ACL.
    - **DefaultRepresentativeACL** – Type the name of the representative entities ACL.
    - **DefaultRetailACL** – Type the name of the customer entities ACL.
    - **DefaultVendorACL** – Type the name of the vendor entities ACL.
    - **DefaultWholesaleACL** – Type the name of the reseller entities ACL.
6. Click the **Verify** button.
7. Verify the new modified configuration and apply this configuration.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

Note that you can always make the original PortaBilling® predefined ACL visible and available again by clicking the **Reset** button near the corresponding option.

... Delete an Active Billing Environment?

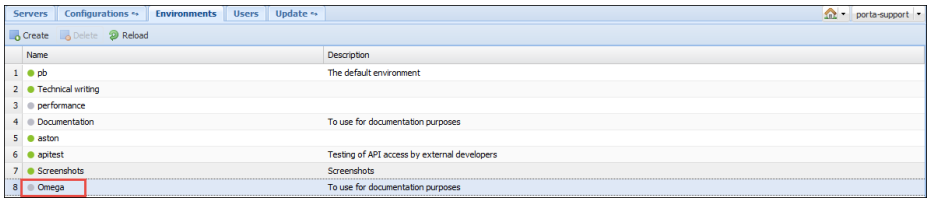
A billing environment is considered to be *active* if its configuration includes at least one instance of

- PortaSIP®
- SIPCluster
- IMGate
- Presence

Active billing environments are in read-only mode and cannot be deleted.

NOTE: The name of an active environment is marked with a grey circle on the web interface, while the name of a non-active environment is marked with a green circle.

All of the instances mentioned must be deleted prior to deleting the environment. This is to ensure that no PortaSIP®, IM or presence services are running.

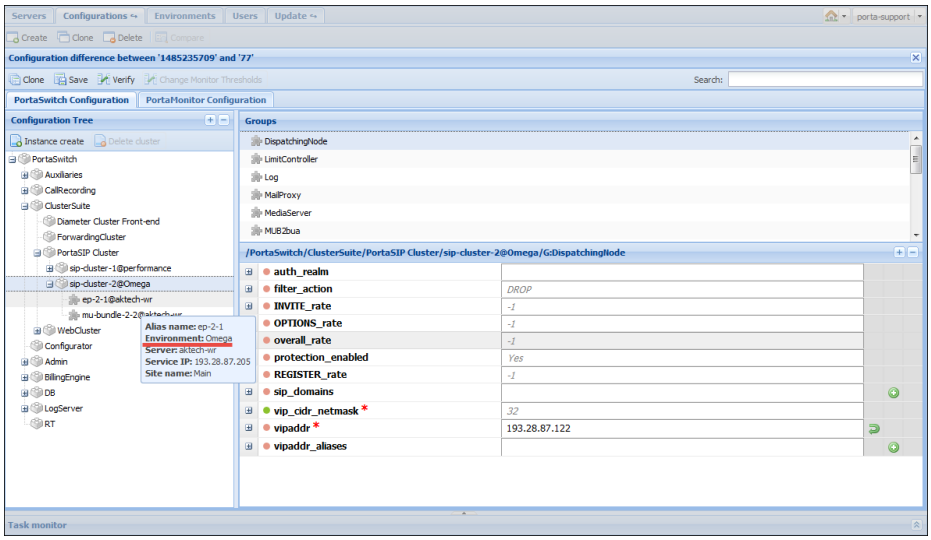


In order to delete an active billing environment proceed with the following steps:

1. Go to the **Configurations** tab and clone the latest configuration.
2. Open the cloned configuration. In the **Configuration Tree** select the PortaSIP® instance from the required billing environment and click the **Instance delete** button. Repeat for all PortaSIP®, SIPCluster, IMGate and Presence instances.

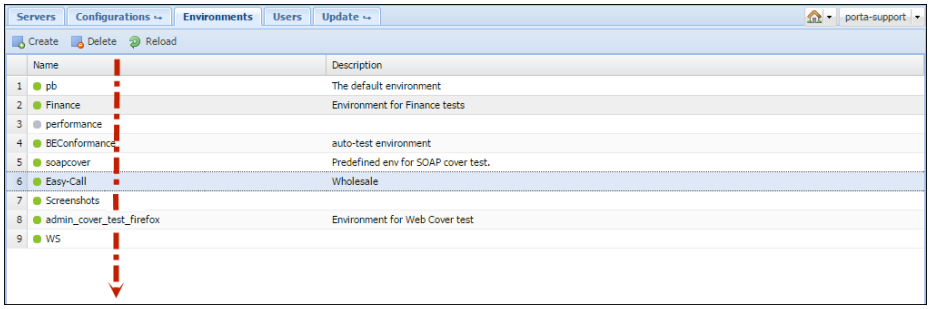
   NOTE: Deletion of PortaSIP® instances instantly deactivates all PortaSIP® services in the corresponding billing environment.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com



3. When all required instances have been deleted, click the **Verify** button. Then, click the **Check/Apply** button to apply the given configuration.
4. Go back to the **Environments** tab. Select the environment that you want to delete. Press **Delete**.

   NOTE: Be aware that once the environment is deleted, all of its settings (tariffs, customers, accounts, vendors, connections, etc.) and CDRs are removed from the PortaBilling® database. You will only have access to statistics in .csv format.

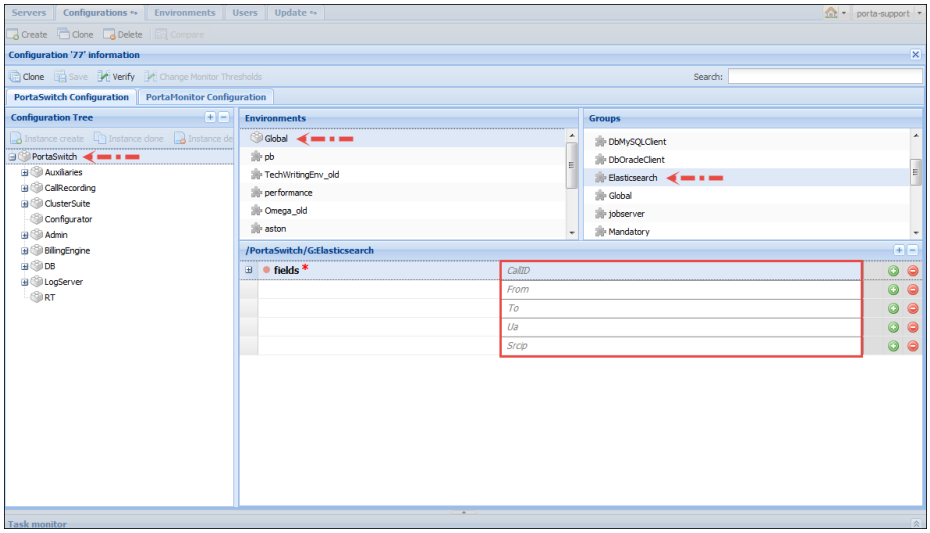


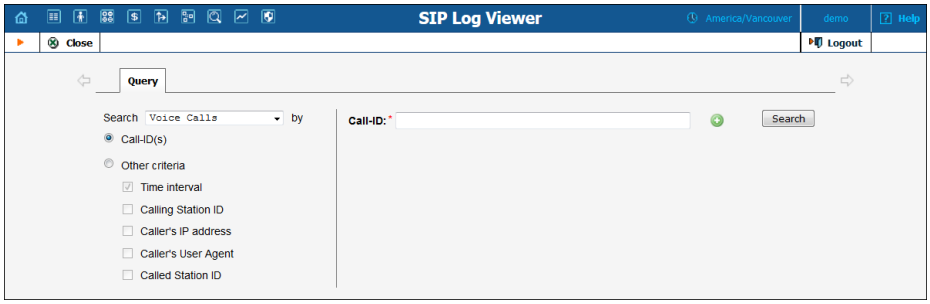
... Configure Search Parameter List for the SIP Log Viewer?

The **ElasticSearch.fields** configuration option contains a list of available search parameters that an administrator can modify via the Configuration server web interface. This option is located under the **PortaSwitch** node→**ElasticSearch** group, and can be configured for each virtual billing environment separately.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

As soon as one of the search parameters is deleted from the list, it disappears from the admin interface and can no longer be used for searches.





The option can have the following values:

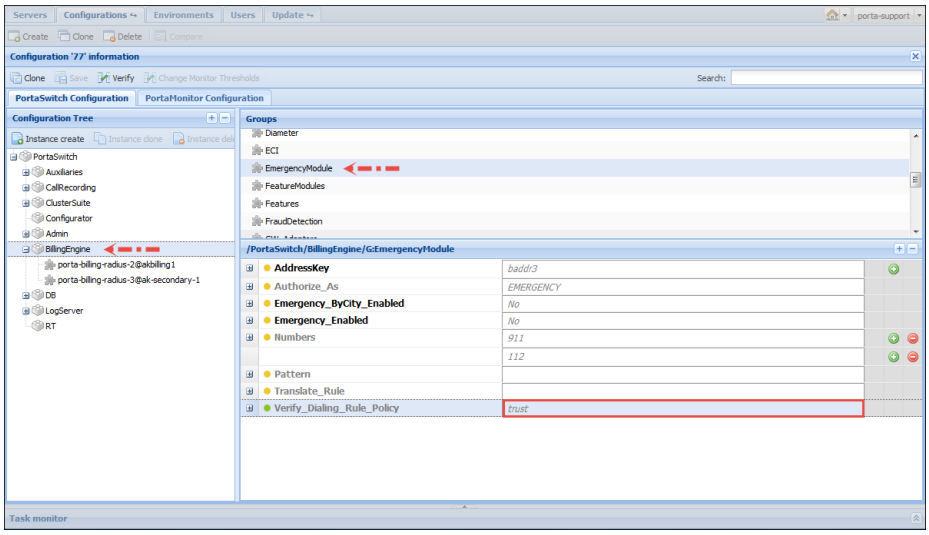
- **CallID** – Filters calls by call ID. (**Call-ID** on the admin interface.)
- **From** – Filters calls in which the originating number (ANI) is a particular phone number. (**Calling-Station-ID**)
- **To** – Filters calls dialed to a particular number. (**Called-Station-ID**)
- **Ua** – Filters calls made from a SIP phone or a dialer application of a particular brand. (**Caller's User Agent)**
- **Srcip** – Filters calls that originated from the specified IP address. (**Caller's IP address)**

When performing a search, the system always uses timestamps (even if the time isn't explicitly specified as a search parameter), and therefore **Time Interval** can't be removed from the search parameter's list.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

… Enable Additional Validation of Dialing Rule Emergency Numbers?

The system can perform an additional validation of emergency numbers that are specified in the dialing rule. To enable such a validation, use the **Verify_Dialing_Rule_Policy** option on the Configuration server web interface (**BillingEngine→Emergency_Module**).



This option can have one of the two values:

- **trust** – Emergency numbers specified in a dialing rule won't be validated.
- **check** – System will check that emergency numbers specified in a dialing rule are among the numbers listed in the **Numbers** option or comply with the rule specified in the **Pattern** option.

The default value is **trust**. If you want to validate dialing rule emergency numbers, select **check** and specify which numbers and / or pattern the numbers must match.

This can be useful if you enable end users to configure their own dialing rules and want be sure that they won't use unsuitable emergency numbers.

Depends on: **EmergencyModule.Emergency_Enabled**.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

… Configure an Adaptec RAID Health Monitoring?

PortaOne monitoring system can collect and analyze disk health information for an Adaptec RAID. This will help you be sure that your hard drives are capable of safely storing your data.

Due to licensing specifics, it is necessary to download and install the corresponding package manually. To do this, perform the following:

1. Download the Adaptec ARCCONF Command Line Utility from **www.adaptec.com**. You can use the following link:

   www.adaptec.com/en-us/speed/raid/storage_manager/arcconf_v2_00_21811_zip.php

2. Unzip the arcconf binary file from the downloaded archive.
3. Copy it to the /usr/bin/ directory on the server that uses Adaptec RAID.
4. Go to the **Deposit** tab on the Configuration server web interface (**Update** -> **Deposit**) and create the following deposit there:
   - **Path** – /usr/bin/arcconf
   - **Type** – File

It is recommended that you not install the full RMP provided by Adaptec as it contains redundant files.

If you are using Adaptec RAID and the package is not installed, you will see the corresponding warning message on the Monitor.

… Configure a Backup Procedure?

For how to configure a backup procedure please refer to the **Configure Backups with Archivist** handbook of the **Unified PortaSwitch Handbook Collection**.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

5. Appendices

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

APPENDIX A. Internal Modules of the Billing Engine

Below you will find the descriptions of some modules that allow you to enable or disable certain PortaSwitch® features. We suggest that you enable additional modules (that have been disabled by default) *only* if you understand how they work and plan to use the functionality they provide.

NumberPortability

This feature is enabled on the Configuration server by default.

See the *Local Number Portability* section in the **PortaBilling Administrator Guide** for more information about this feature.

CallParking

This is a convenient IP Centrex feature that allows users to put a conversation on hold, move to a different location, and then resume the conversation from a different IP phone by dialing a pickup code. Enable **Call Parking** when you want to use this feature.

GroupPickup_Enabled

By dialing a Group Pickup Prefix on the phones, this feature permits those phones within the same IP Centrex environment (all accounts under the same customer) to answer each other's calls. This feature is enabled by default.

FavoriteNumbers_Enabled

The **Favorite numbers** feature permits the application of a special promotional rating for a group of numbers that are individually defined for each subscriber. After this feature is enabled in the billing engine, the "Favorite numbers" feature is enabled for individual accounts on the **Account info** page in the **Service Features** tab of the web interface.

Callback

Enabling this module permits the use of the special authorization and rating models for callback service.

DialPlan_Enabled

This module is used to produce a "routing prognosis" (a list of routes to be used when a specific phone number is called) when requested from the

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

"Test dialplan" portion of the PortaBilling web interface. It should be enabled in order for the web dial plan component to operate correctly.

CLDlookupInDIDinventory (DID Inventory Module)

If you purchase bulk numbers from a telco operator and upload them to PortaSwitch®, but some of them are not yet provisioned to PortaSwitch® accounts, these numbers may cause routing loops. Someone calls a number; the call is delivered to your network; but since the destination number does not belong to any local account, PortaSwitch® considers it to be an outside number and routes it to an external carrier, which then delivers it to your network again, and the action repeats continually, again and again.

In order to prevent this from happening, numbers that do not belong to any local accounts (while currently available in the database) can be "registered" in the DID inventory. When a call is made to one of these numbers, PortaSwitch® considers these numbers "not yet provisioned" and therefore, the call fails and shows the following disconnection code: CLD_UNASSIGNED. Therefore, enable this module to prevent routing loops for calls to unassigned DID numbers.

UnifiedMessaging_Enabled

When this module is enabled it takes control of the handling and routing for the PortaSwitch® Media server voice applications. Do not forget to activate the UM feature for products that are required to provide UM service:

1. On the PortaBilling® **Main Menu** page, in the **Rating** section, choose **Products**.
2. On the **Product Management** page, click on the name of the corresponding product.
3. Click on the **Service Configuration** tab.
4. In the **Services** column, under **Voice Calls**, select **Incoming Calls**.
5. From the **UM Enabled** list, select **Enabled** to activate UM services for this product.

IvrUtilities_Enabled

This module implements various actions, requested by IVR applications (e.g. performing a customer sign-up by creating a new account). This module is enabled on the Configuration server by default.

Paging_Enabled

PortaSwitch® supports the Paging / Intercom Calls feature, which enables users from the same group to use two phones like an on-door speakerphone.

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

This module is enabled on the Configuration server by default.

See the **Paging / Intercom Calls** section in the **PortaSIP Administrator Guide** for more information.

FixUpBrokenAccessNodeRatingPatterns

Enable this module if you need a workaround for improperly configured third party nodes, i.e. when one node sends a call to another one in a non-E.164 format and the BE authorization is inconsistent with access code accounting.

NOTE: When using the rating pattern on third-party access nodes, no newer special features will be available.

APPENDIX B. Paths to Tops of Build Areas in SRPM Packages

The following table provides paths to the tops of build areas for patching SRPM packages. For example, to modify `/opt/diaconv/file` specify the `./diaconv/file` path in a patch file's header.

SRPM	The Path on the File System	The Path in a Patch File
archivist	/home/archivist/file	./file
b2bua	/home/porta-sip/sippy/file	./file
checksuite	/usr/share/suitability-checker/file	./file
dbup	/home/porta-configurator/pcup/dbup/file	./file
dbup2	/home/porta-configurator/pcup/dbup2/file	./file
diaconv	binary	./file
edgeproxy	binary	./file
extractaudio	binary	./file
fopd	binary	./file
g729client	binary	./file
g729d	binary	./file
imgate	binary	./file
libg723-devel	binary	./file

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

libg729-devel	binary	./file
libilbc-devel	binary	./file
liblog	binary	./file
limit-controller	binary	./file
log4cplus-python	binary	./file
makeann	binary	./file
oracle-encrypt	binary	./file
porta-admin	/home/porta-admin/file	./file
porta-base	/home/porta-base/file	./file
porta-billing	/home/porta-billing/file	./file
porta-callrecording	/home/porta-callrecording/file	./file
porta-cdrimport	/home/porta-cdrimport/file	./file
porta-cdrmediator	/home/porta-cdrmediator/file	./file
porta-configurator	/home/porta-configurator/file	./file
porta-configurator-data	/home/porta-configurator/data/file	./file
porta-db	/home/porta-db/file	./file
porta-ivr	/home/porta-ivr/tcl/file	./file
porta-ivr-tts	/home/porta-ivr/tts/file	./file
porta-monitor	/usr/libexec/nagios/portaone/file /var/www/nagios/rrd/file /etc/nagios/file	./config/file ./plugin/file ./rrd/file
porta-mp-signup	/home/porta-admin/apache/multi_product_signup/file	./file
porta-mysql	/usr/lib/systemd/system/porta-mysqld.service	./porta-mysqld.service
porta-oracle	/home/oracle/file	./file
porta-presence	/home/porta-presence/file	./file
porta-radius	/home/porta-radius/file	./file
porta-rt	/home/porta-rt/file	./file
porta-selfcare	/home/porta-admin/apache/IPCentrex_SelfCare/file	./file
porta-signup	/home/porta-admin/apache/signup/file	./file

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com

porta-sip	/home/porta-sip/file	./file
porta-smstrigger	/home/porta-smstrigger/file	./file
porta-um	/home/porta-um/file	./file
porta-ws	/home/porta-ws/file	./file
protector	/home/protector/file	./file
registrar	binary	./file
runtest	/home/porta-one/billing-performance/file	./file
siplogindexer	binary	./file
sip-prompts	/var/lib/porta-sip/sounds/file	./file
sip-subscription-manager	binary	./file
ua-profile-gen	/home/porta-admin/utils/ua/file	./file
um-prompts	/var/lib/psmsc/prompts/file	./file
wssetup	/usr/share/wssetup/file	./file

© 2000–2017 PortaOne, Inc. All rights Reserved. www.portaone.com