Agency Management Software / blueButler iDR
INTEGRATION SPECIFICATIONS

The goal of this project is to provide customers with the ability to automate the integration of the blueButler iDR (Intelligent Digital Recording) MP3 Voice Recording files into their BMS (Broker / Agency Management Software).

In general, customers prefer to process records and activity tracking in real-time and are looking for ways to avoid processing "backlog" at the end of the day. In fact, many are actively reviewing their processes to eliminate backlog activities. As such, the design should enable real-time creation of the MP3 phone activity records in their BMS system and not be based on batch processing methodology.

Attach Recording

To attach an MP3 recording file to the BMS system customer/prospect/policy/claim record, the user will open a Phone Activity Record in the BMS system. The BMS will prompt the user to select whether this activity record should be linked to the current active phone call or to a previous call.

The BMS system will call a blueButler Web Service and use meta-tags in the URL to pass key information to blueButler including:

- A unique id that can be used to identify the Activity record in the BMS
- An indicator of whether to link the record to the active phone call or not
- Any other data fields that may be desirable to store in the blueButler SQL record (eg. account number, policy/claim number, etc)

blueButler will acknowledge the request and return the unique blueButler Reference Number for the MP3 file if the user requested linking to the active phone call. Note that if there was not an active call, the system will return the message "No Active Call".

In cases where the user does not want to link to the active call or where no active call is in progress, blueButler can call the BMS when the user links the Activity record to the blueButler SQL record. blueButler does store all the linking information within it's SQL database.

http://{blueServer}:8000/bluebutler/service/AddLink/id={bms_activity_id}?type={bms}&data1={data}&data2={data}&data3={data}&data4={data}&data5={data}&host={client_hostname_or_ip}&activeCall={true/false}

Purpose: Used by the BMS software to pass a unique ID for an activity record and other associated data fields to blueButler and have blueButler return the unique blueButler Reference Number for the active call to the BMS software

Variable: id - is the unique ID for the BMS activity record

Optional: type - is the name of the BMS software platform

data1 through data5 are additional data elements being passed by the BMS software to blueButler (ie. Account number, policy number)

host - is used to identify the user workstation when the request comes from the BMS Server rather than directly from the BMS Client workstation

activeCall - is used when the user indicates through the BMS that they want to link the activity record to the phone call in progress – set to TRUE or FALSE; default value is FALSE

Returns:　　string value

- unique Reference Number - when the activeCall parameter is set to TRUE and there is a call in progress

- "No Active Call" - if activeCall is set to TRUE and there is no call in progress

- set to NULL if activeCall is set to FALSE (default)

- set to "Error" if the request fails

Notes:

For AddLink requests where activeCall is set to FALSE (default) or where there is no call in progress, blueButler will request the user to manually link the request to a specific MP3 file in the SQL database. When the user links the record, blueButler will add all the information to it's SQL database and optionally can send it to the BMS system providing a method has been provided to blueC.

Playback Recording

When the user opens a Phone Activity Record in the BMS system that has been tagged with the blueButler Reference Number, they can click on the attachment icon or command to play the MP3 file. The BMS will use Windows Login credentials that are configured in blueButler with "Global Listening Rights" to enable access to all of the recording files in blueButler. This security model assumes that the BMS is authenticating which users have access rights to individual BMS Activity records and the associated MP3 call recording files.

Two methods are provided for the BMS to playback recordings; (1) Play (stream) MP3 on PC speakers or headset and (2) Play by Phone.

Play MP3 (stream to PC)

The BMS will call the blueButler Play MP3 Web Service with the Reference Number for the MP3 call recording file. blueButler will transfer a FileStream to the BMS system. The BMS system should save this to a temporary file and open it. Windows will play the temporary file with the user's default media player. The web service maintains secure access over the recording to ensure only authorized users can listen to the recording.

http://{blueServer}:8000/bluebutler/service/MP3/{refNum}

Purpose:　　Stream the MP3 audio file to the BMS software; the BMS captures the streamed audio to a temporary file and opens a media player session to play the recording

Variable:　　{refnum} is the Reference Number for the MP3 recording file

Returns:　　FileStream

- MP3 file stream

- NULL if the request fails (ie. No mp3 file with that refnum)

Notes:

This method uses Windows authentication to determine if the user is allowed access to the file. If you do not set the login account, it will use the currently logged in user's profile and the Web Service may

deny access to the file. If there is no domain, create the account on the blueButler server instead of in Active Directory.

Play by Phone

For the Play by Phone method, the BMS software should prompt the user to enter the phone number that they want blueButler to call out to in order to play the recording over the phone. The BMS will call the blueButler Play-by-phone Web Service with the Reference Number for the MP3 call recording file and the phone number to be called. blueButler will call the phone number and prompt the user over the phone through the playback of the recording.

http://{blueServer}:8000/bluebutler/service/PlayByPhone/{refNum}/{phone_number}

Purpose: blueButler calls out to the phone number provided to play the MP3 audio file

Variable: {refnum} is the Reference Number for the MP3 recording file

{phone_number} is the phone number to be called

Returns: string value

- TRUE if the request is successful

- FALSE if the request fails

- "ERROR: No Playback Channels" if there is no Dialogic card configured in the blueButler system or if all Dialogic channels are in use

Notes:

This service requires the blueButler Dialogic Option to be installed and connected to the PBX in order to establish the phone connection.