

System Configuration

Export of recordings



Administration manual

for tenants

9/23/2020

Product line neo, version 6.x

The described functions can be used with the following ASC products:

EVOIPneo

EVOLUTIONneo / XXL / eco

EVOflex (country-specific)

Please note that you can always find the most up-to-date technical documentation and product updates in the partner area on our website at <http://www.asctechnologies.com>.

Copyright © 2019 ASC Technologies AG. All rights reserved.

Windows is a registered trademark of Microsoft Corporation. VMware® is a registered trademark of VMware, Inc. All other marks and names mentioned herein may be trademarks of their respective companies.

Contents

1	General information	5
2	Introduction	6
3	Supported file systems.....	7
4	Supported export formats	8
5	Main view	9
5.1	Toolbar of the Export module	10
5.1.1	Search.....	11
6	Detail view.....	12
6.1	Configure export job for WAV + XML	13
6.1.1	Tab Details	13
6.1.2	Tab Schedule	15
6.1.2.1	Group field Period of Time	16
6.1.2.2	Group field Interval.....	16
6.1.2.3	Group field Series	17
6.1.3	Tab Criteria	19
6.1.3.1	Create bulk job	19
6.1.3.2	Create rule-based job.....	22
6.1.4	Tab Drives.....	29
6.1.4.1	Assign drive.....	29
6.2	Configure export job for MP3 + XML.....	30
6.2.1	Tab Details	30
6.2.2	Tab Schedule	32
6.2.2.1	Group field Period of Time	32
6.2.2.2	Group field Interval.....	33
6.2.2.3	Group field Series	33
6.2.3	Tab Criteria	35
6.2.3.1	Create bulk job	36
6.2.3.2	Create rule-based job.....	38
6.2.4	Tab Drives.....	45
6.3	Configure export job for neo Conversation	45
6.3.1	Tab Details	45
6.3.2	Tab Schedule	47
6.3.2.1	Group field Period of Time	48
6.3.2.2	Group field Interval.....	48
6.3.2.3	Group field Series	49
6.3.3	Tab Criteria	50
6.3.3.1	Create bulk job	51
6.3.3.2	Create rule-based job.....	54
6.3.4	Tab Drives.....	61

7	Edit job configuration	63
8	Start export	64
9	Cancel export	65
	List of figures	66
	List of tables	69
	Glossary	70

General information

In the context of this document ASC represents ASC Technologies AG, its subsidiaries, branch offices, and distributors. An up-to-date overview of the aforementioned entities can be found at <https://www.asctechnologies.com>

ASC assumes no guarantee for the actuality, correctness, integrity or quality of the information provided in the manuals.

ASC regularly checks the content of the released manuals for consistency with the described hardware and software. Nevertheless, deviations cannot be excluded. Necessary revisions are included in subsequent editions.

Some aspects of the ASC technology are described in general terms to protect the ownership and the confidential information or trade secrets of ASC.

The software programs and the manuals of ASC are protected by copyright law. All rights on the manuals are reserved including the rights of reproduction and multiplication of any kind, be it photo mechanical, typographical or on digital data media. This also applies to translations. Copying the manuals, completely or in parts, is only allowed with written authorization of ASC.

Representative, if not defined otherwise, is the technical status at the time of the delivery of the software, the devices and the manuals of ASC. Technical changes without specified announcements are reserved. Previous manuals lose their validity.

The general conditions of sales and delivery of ASC in their latest version apply.

2 Introduction

This manual describes how audio recordings can be exported from a recording server.

The following formats are available:

- [WAVE + XML](#)
- [neo](#) Conversation

In the Export module of the application System Configuration, you can configure export jobs to export selected recordings.

Exported recordings are neither considered as archived nor marked as archived in the database.



For information about the import format [neo](#) Conversation refer to the administration manual *Export and import neo to neo* (for system providers and tenants).



Note that a network-based solution increases the network load which can cause problems in some infrastructures.

3 Supported file systems

For the different drive types, different file systems can be used. Exceptions are storage expansions and [NAS](#) drives. The following table shows possible combinations:

Drive	File system			
	ASCFS	NTFS	FAT32	exFAT
Internal hard disks	-	X	X	-
External hard disks	-	X	X	X
RDX	-	X	-	X
DVD-RAM	X	-	-	-



[ASCFS](#) is a proprietary file system of ASC for DVD-RAM media. In Microsoft Windows Explorer, media in [ASCFS](#) format are displayed as empty. You can check the contained data and the available storage capacity on the medium via the application System Configuration.



If you use FAT32, the medium must not exceed a size of 32 GB. Otherwise, it cannot be formatted.

For larger media use NTFS or exFAT.

4 Supported export formats

The following export formats are supported for the export of recordings:

WAV + XML

WAV + XML is the export format for exporting conversations to be used outside a neo recording system. The audio data of the conversations is exported in [WAVE](#) format, the additional data in [XML](#) format. The file names of associated [WAVE](#) and [XML](#) files have are identical.

To export conversations in [WAVE](#) format, exclusively the following codecs are supported:

- [PCM](#): 128kbit/s (PCM16) and 64kbit/s (PCM8)
- [A-law](#): 64kbit/s
- [μ-law](#): 64kbit/s

Supported sampling rate: 8kHz

MP3 + XML

MP3 + XML is the export format for exporting conversations to be used outside a neo recording system. The audio data of the conversations is exported in [MP3](#) format, the additional data in [XML](#) format. The file names of associated [MP3](#) and [XML](#) files have are identical.

When using [MP3](#), less storage space is required for high-quality recordings than when exporting conversations in [WAVE](#) format.

neo Conversation

neo Conversation is the export format for exporting conversations to be used in another neo recording system. The audio data of the conversations is exported in the neo Conversation format and can be imported into another neo system directly.



5

Main view

To be able to export recordings, you must create an export job.



The following configuration has to be carried out as the administrator of the tenant.

1. Open the application System Configuration.
2. Log in as tenant.
3. Select the menu item *Conversations > Export*.

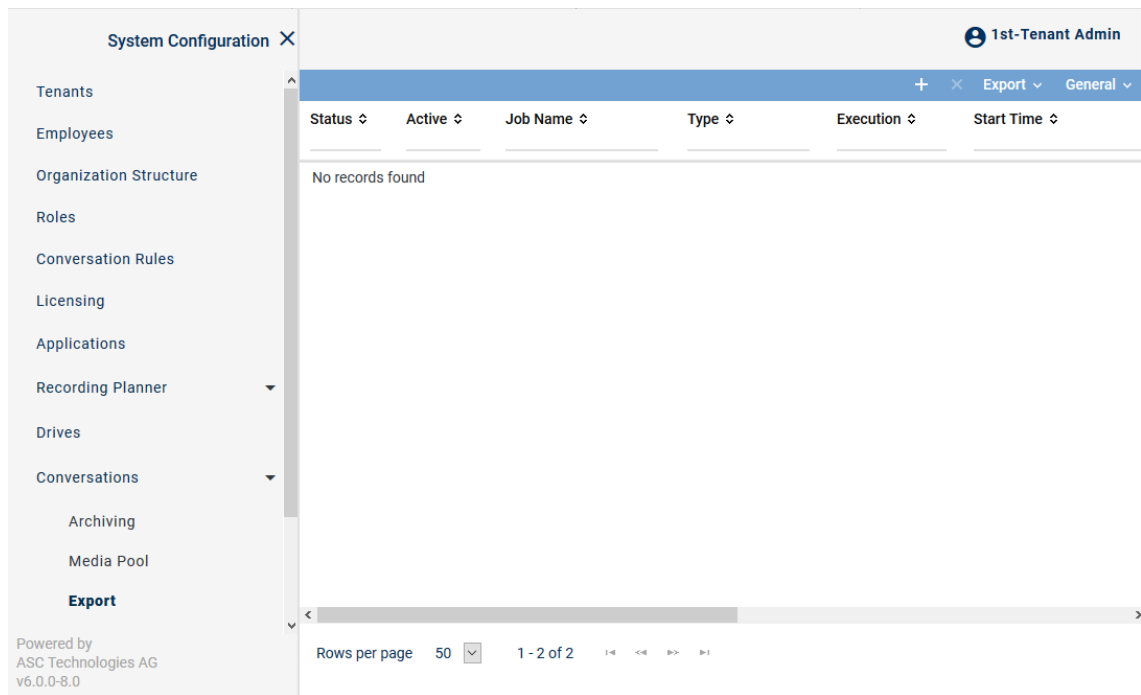








Fig. 1: Export - main view

Depending on the configuration of the columns, the following information is displayed in the main view:

Status	Shows the editing status of the job configuration.  = Job configuration has been released.  = Job configuration is a draft.  = Job configuration has been deactivated.
Active	Shows whether an export job is active.  = Job is active.  = Job is not active.
Job Name	Name of the job configuration
Type	Shows whether the export job is a <i>bulk job</i> or a <i>rule-based job</i> .
Execution	Shows whether the export job is executed regularly or only once.  = Job is executed regularly.  = Job is executed once. (This execution type is temporarily unavailable.)
Start Time	Shows when the export job starts.
End Time	Shows when the export job ends.
Version	Version number of the job configuration.

<i>Based On</i>	Name of the job configuration from which this job configuration has been copied or cloned.
<i>Creation Date</i>	Date on which the job configuration was created.
<i>Updated</i>	Date on which the job configuration was updated for the last time.

2 formats are available for the export.










Status	Active	Job Name	Type	Execution	Start Time
		WAV XML	Bulk job		18.01.2019 01:29:38
		neo Conversation	Rule-based job		18.01.2019 01:28:21
		MP3 XML	Bulk job		18.01.2019 01:29:38





Fig. 2: Export formats

5.1 Toolbar of the Export module

The toolbar offers the following functions.



Fig. 3: Toolbar

	<i>Search</i>	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria. The icon  is displayed whenever the search has been adjusted by means of a filter.
	<i>Reset search</i>	Resets all search filters so that the main view displays all data sets again.
	<i>Create New</i>	Creates a new job configuration, see Create job configuration.
	<i>Create New Version</i>	Creates a new version on the basis of the selected job.
	<i>Add New Period for Version</i>	Creates a new version on the basis of the selected job and activates the group field <i>Consider Recordings Once</i> in the detail view. The version of the job searches for data in the defined period of time and processed it once again. NOTICE! This menu item is only available to be used on the basis of a released job.
	<i>Create Clone</i>	Creates a new job configuration on the basis of the selected job.
	<i>Delete</i>	Deletes the selected job configuration. You can only delete job configurations with the status <i>Draft</i> or <i>Deactivated</i> .
<i>Export</i>	<i>Start</i>	Starts the selected job if it has been paused before with the function <i>Pause job</i> . The job is executed again according to the settings in the tab <i>Schedule</i> .

	<i>Pause Job</i>	Pauses the selected job.
<i>General</i>	<i>Print</i>	Prints the table of the main view.
	<i>Adjust Table</i>	Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page
	<i>Save Table Configuration</i>	Saves the current table configuration of the main view as default view of the user.
	<i>General Help</i>	Opens the online help.
	<i>Module Help</i>	Opens the module-specific online help.





For detailed information on default functions such as *Print*, *Adjust table*, or *Help* refer to the user manual for administrators *System Configuration - General Information*.

5.1.1

Search

The search function allows searching systematically for sets of data which meet certain criteria.

1. In the toolbar, click on the icon  or  (*Search*).
⇒ The window *Search Criteria* appears.

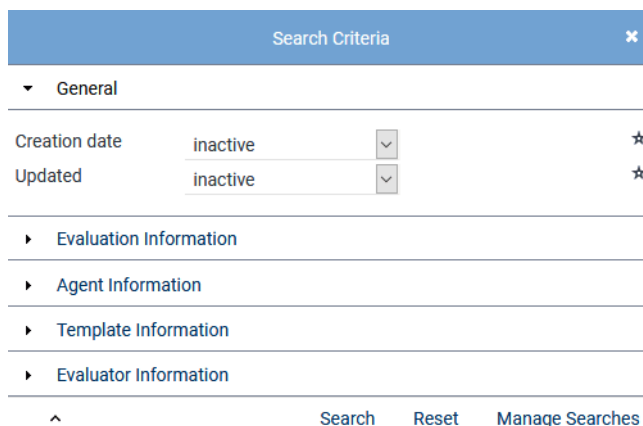





Fig. 4: Window Search Criteria (example)

2. Set the respective search criteria.
NOTICE! It depends on the respective module which search criteria are available.
3. To start the search, click on the button *Search*.
To reset all manually entered search criteria, click on the button *Reset*.
⇒ After running the search, only those sets of data are displayed in the main view which meet the set search criteria.
4. To display all original sets of data in the main view again, i. e. to reset the manually entered search criteria, click on the icon  (*Reset search*) in the toolbar.

By clicking on the button *Manage Searches*, you can save the defined search criteria under an unambiguous name, load saved search criteria or delete them.

By clicking on the icon , you can tag the search criterion as favorite. Criteria tagged as favorite are displayed additionally in the upper area of the window *Search Criteria* and marked with the icon .



A detailed description of the search function can be found in the user manual *System Configuration - General information*.



The precondition for creating a job configuration is that a drive is available and has been set up correctly in the operating system. In the Drives module, you see which drives are available. If no appropriate drive is available, contact your system provider.




When using the export format *neo* Conversation, the source system and the destination system must have a physical connection. You have to use a drive as target drive which is located in the destination system and has been activated to be used in the network.

In the Drives module, you see which drives are available. If no appropriate drive is available, contact your system provider.



For basic information about the Drives module refer to the administration manual for tenants *Drives module*.

1. To create a job configuration, click on the icon  (*Create*) in the toolbar of the main view.
2. Select one of the following options:

<i>Create New</i>	A completely new job configuration is created.
<i>Create New Version</i>	<p>The selected job configuration serves as copy template for a new version. A new version is created automatically. The version number is increased automatically.</p> <p>The option is only displayed if there are already job configurations in the module.</p>
<i>Add New Period for Version</i>	Activates the group field <i>Consider Recordings Once</i> in the detail view where you can define a period of time to export all conversations once again which have been recorded during this period.
<i>Create Clone</i>	<p>The selected job configuration serves as copy template for a new job configuration. A new job configuration with the version number "1" is created.</p> <p>The option is only displayed if there are already job configurations in the module.</p>

The detail view contains 4 tabs; depending on the selected export format, you find information in the following chapters:

Export job for WAV + XML

- *Details*

Here, you can display and edit detailed information about the selected job configuration.

See [chapter "Tab Details", p. 13.](#)

- *Schedule*

Here, you can display and edit the settings of the schedule.

See [chapter "Tab Schedule", p. 15.](#)

- *Criteria*

Here, you can display and edit different criteria for the selected job configuration.

See [chapter "Tab Criteria", p. 19.](#)

- *Drives*

Here, you can display and select the export drives.

See [chapter "Tab Drives", p. 29.](#)

Export job for MP3 + XML

- *Details*

Here, you can display and edit detailed information about the selected job configuration.

See [chapter "Tab Details", p. 13.](#)

- *Schedule*

Here, you can display and edit the settings of the schedule.

See [chapter "Tab Schedule", p. 15.](#)

- *Criteria*

Here, you can display and edit different criteria for the selected job configuration.

See [chapter "Tab Criteria", p. 19.](#)

- *Drives*

Here, you can display and select the export drives.

See [chapter "Tab Drives", p. 29.](#)

Export job for neo Conversation

- *Details*

Here, you can display and edit detailed information about the selected job configuration.

See [chapter "Tab Details", p. 45](#)

- *Schedule*

Here, you can display and edit the settings of the schedule.

See [chapter "Tab Schedule", p. 15.](#)

- *Criteria*

Here, you can display and edit different criteria for the selected job configuration.

See [chapter "Tab Criteria", p. 50.](#)

- *Drives*

Here, you can display and select the export drives.

See [chapter "Tab Drives", p. 29.](#)

1. Adjust all necessary settings in the tabs of the detail view.
You can change tabs without buffering. The settings are not lost.
Once you have adjusted all settings, save the configuration.

6.1 Configure export job for WAV + XML**6.1.1 Tab Details**

1. Click on the tab *Details* to configure an export job.
 - ⇒ The draft appears in the export format WAV + XML.

<

Details*

Schedule

Criteria

Drives*

>

② Help

Name*

WAV XML

Description

Status

Draft

▼

Export format

WAV + XML

▼

Codec

Linear PCM16

▼

Date format in xml

yyyy-MM-dd'T'HH:mm:ss.SSS'Z'

▼

Activate voice disguising

☐

Cutoff of the calls (beginning)

☐

0

Milliseconds

Cutoff of the calls (end)

☐

0

Milliseconds

Version

1

Version/Clone of

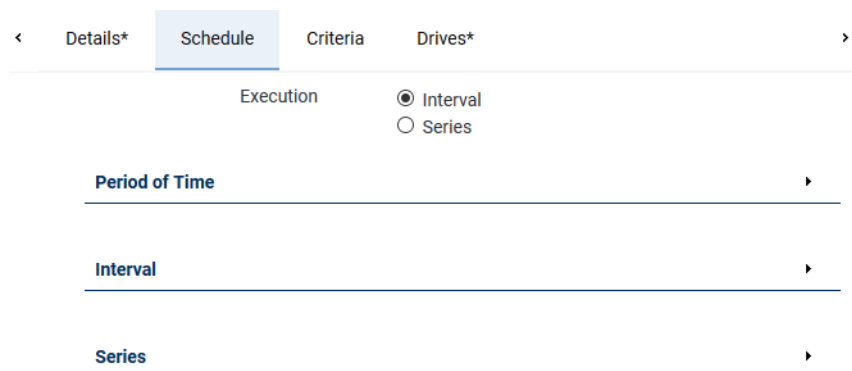
Fig. 5: Tab Details - Export in WAVE format

Name	Enter the name of the job configuration.
Description	Here, you can enter a description for the job configuration.
Status	<p>Enter the processing status of the job configuration. Possible options:</p> <ul style="list-style-type: none"> • Draft Select this status if you would like to be able to continue editing the job configuration. • Released Select this status if you have finished editing the job configuration. This status activates the job configuration. The job is automatically started at the point in time defined in the schedule. NOTICE! A released job configuration cannot be edited anymore. • Deactivated (Precondition: job configuration has been released) Select this status to deactivate the job configuration and thus the job. NOTICE! A deactivated job configuration cannot be activated again! To be able to edit or activate a deactivated job configuration, you have to create a new version of the job configuration.
Export format	<p>To export recordings, select the format WAV + XML from the drop-down list.</p> <p>For information about the available formats see chapter "Supported export formats", p. 8.</p>
Minimum number of conversations	<p>Define whether the number of conversations entered in the corresponding entry field has to be available before executing the export job. Only conversations are considered which meet the criteria of the job.</p> <p><input checked="" type="checkbox"/> = Entered number of conversations is considered.</p> <p><input type="checkbox"/> = Entered number of conversations is ignored.</p>

	<p>If the minimum number of conversations is considered but the number has not been reached on the start date, the export job skips one export interval. If this is a job which is supposed to be executed only once, this job is not executed at all. If this is a job which is repeated periodically, it will check whether the number has been reached upon the start of the next export interval.</p>
<i>Codec</i>	<p>If you have selected the export format <i>WAVE+XML</i>, then here you have to select the codec which is supposed to be used for the export of the audio data.</p> <p>Select the codec from the drop-down list.</p> <p>For information about the available codecs see chapter "Supported export formats", p. 8.</p>
<i>Date format in xml</i>	<p>Select the format of the date and of the time from the drop-down list. When exporting recordings, the information is saved in this format in an XML file.</p> <p>The following formats are available:</p> <ul style="list-style-type: none"> • yyyy-MM-dd'T'HH:mm:ss.SSS'Z' • yyyy-MM-dd HH:mm:ss.SSS • yyyy-MM-dd'T'HH:mm:ss'Z' • yyyy-MM-dd HH:mm:ss
<i>Activate voice disguising</i>	<p>If this check box is activated, the voices of the call participants are distorted during replay in order to render them unrecognizable while the content continues to be intelligible. Voice disguising only affects the replay, not the source data.</p>
<i>Cutoff of the calls (beginning)</i>	<p>If this check box is activated, the beginning of the call is cut off so that e. g. the welcome and the introduction are not replayed. In the entry field, enter how many milliseconds are supposed to be cut off at the beginning of the call. Cutoff only affects the replay, not the source data.</p>
<i>Cutoff of the calls (end)</i>	<p>If this check box is activated, the end of the call is cut off so that e. g. the goodbye is not replayed. In the entry field, enter how many milliseconds are supposed to be cut off at the end of the call. Cutoff only affects the replay, not the source data.</p>
<i>Version</i>	<p>Version number of the job configuration.</p>
<i>Version/Clone of</i>	<p>Job configuration from which the job configuration has been copied or cloned.</p>

6.1.2 Tab Schedule

In this tab, you can display and edit the settings of the schedule.



< Details* **Schedule** Criteria Drives* >

Execution

☒ Interval
☐ Series

Period of Time

Interval

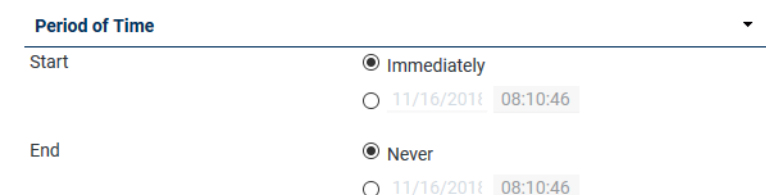
Series

Fig. 6: Tab Schedule

Execution	<p>Select whether the job is supposed to be executed in specified intervals or as a series.</p> <ul style="list-style-type: none"> Interval The job is repeated in specified intervals. The interval is defined in the group field <i>Interval</i>. Series The job is executed on certain serial dates. These dates are defined in the group field <i>Series</i>.
------------------	---

6.1.2.1 Group field Period of Time

Define the period of time in which the job is supposed to be executed.



Period of Time



Start

☒ Immediately
☐ 11/16/2011 08:10:46

End

☒ Never
☐ 11/16/2011 08:10:46

Fig. 7: Schedule - Period of Time

Start	<ul style="list-style-type: none"> Immediately The job is started immediately. Entered date The start is defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .
End	<ul style="list-style-type: none"> Never The job never ends. Entered date The end is defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .

6.1.2.2 Group field Interval

This group field is only active if the execution type *Interval* has been selected.

Define the interval in which the job is supposed to be repeated.

Interval ▼

Month(s)
 Day(s)
 Hour(s)

Minute(s)

Fig. 8: Schedule - Interval

You can define a certain period of time during which the job is supposed to be carried out. This offers the possibility to run export jobs during night time only, for instance.

Activate period of time Enter the period of time during which the job is supposed to be carried out.

Keep in mind that due to technical reasons those periods can only be configured on the top of the hour; half-hours are adjusted upward. This has an impact if the server containing the data to be exported is located in a time zone which differs from Coordinated Universal Time (UTC) by x 1/2 hours.



Example: Recorded data is supposed to be transferred from the export server in India (UTC + 5 1/2) to a target server in Germany during 8 pm and 10 pm Indian local time. This corresponds to 2:30 pm and 16:30 pm UTC. By adjusting the half-hour upward, the period for the export is translated into 3 pm to 5 pm which corresponds to Indian local time of 8:30 pm to 10:30 pm.

6.1.2.3

Group field Series

This group field is only active if the execution type *Series* has been selected.

Define at which points in time the job is supposed to be repeated.

Series ▼

Repeat

☐ Daily
☐ Weekly
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
☐ Sunday
☒ Monthly
☒ + -
☐

Fig. 9: Schedule - Series

Repeat	<p>Days on which the job is supposed to be executed.</p> <p>Daily = The job is repeated daily at the entered time.</p> <p>Weekly = The job is repeated on the selected days at the entered time. You can select one or several weekdays.</p> <p>Monthly = The job is repeated on the selected days at the entered time. You can either select particular dates or certain days. See chapter "Configure monthly repetition on fixed dates", p. 18 and chapter "Configure monthly repetition on fixed days", p. 18.</p>
---------------	--

6.1.2.3.1 Configure monthly repetition on fixed days

1. Select the lower option:

☒ Monthly
☐ + -
☒

Fig. 10: Configure fixed days

2. In the two drop-down lists, select the day of every month on which the job is supposed to be executed.

6.1.2.3.2 Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly
☒ + -
☐

Fig. 11: Configure fixed dates

2. Click on the button + to select dates in a calendar.

Selected days

1	2	3	4	5	6	7	8
9	10	11	12	13	14	15	16
17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	

+ -

Fig. 12: Select dates

3. Click on all dates on which the job is supposed to be executed.
To revoke a selection, click on the selected date once again. The selection is deleted.
⇒ The selected dates are inserted automatically into the entry field.
4. Click on a spot outside the calendar to apply the selected dates and close the calendar.
5. If you would like to correct the selection of the dates, you can open the calendar again by clicking on the button + .
Adjust the dates according to the description.
6. If you would like to delete all selected dates, click on the button - .
⇒ All dates in the entry field are deleted.

6.1.3 Tab Criteria

In this tab, you can display and edit different criteria for the selected job configuration.

General part

<i>Type</i>	<p>Define whether the job is supposed to be a bulk job or a rule-based job.</p> <ul style="list-style-type: none"> • <i>Bulk job</i> The job type <i>bulk</i> selects all recordings of a definable period of time. You can only define a period of time and a starting delay. • <i>Rule-based job</i> The job type <i>rule-based</i> allows selecting conversations according to rules defined by the user. You can define several criteria in the different group fields to create individual rules.
Behavior if no audio exists	<div> <input type="radio"/> Export only XML file <input checked="" type="radio"/> Skip conversation </div>

Fig. 13: Tab Criteria

<i>Behavior if no audio exists</i>	<p>Define what is supposed to happen during the export when no audio file exists. The following options are available:</p> <ul style="list-style-type: none"> • <i>Export only XML file</i> In this case, a data set with additional data will be available after the export but no corresponding audio. • <i>Skip conversation</i> In this case, no information will be available after the export.
------------------------------------	--



Since exclusively calls can be exported as WAVE files, the group field *Conversation Types* is not available for job configurations with the export format *WAV + XML*.

6.1.3.1 Create bulk job

For a bulk job, you can configure the following criteria.

Details*
Schedule
Criteria
Drives*

Type

☒ Bulk job
☐ Rule-based job

Behavior if no audio exists

☒ Export only XML file
☐ Skip conversation

Consider Recordings

From
07/07/2020
18:41:35

Data source

☒ only callpool
☐ also from expansions
☐ also from archives
☐ also from expansions and archives

Save
Reset

Fig. 14: Configure criteria for the bulk job

6.1.3.1.1 Group field Consider Recordings

Define the period of time that conversations are supposed to be selected from.


Consider Recordings

From
01/18/2019
01:29:38


Data source

☒ only callpool
☐ also from expansions
☐ also from archives
☐ also from expansions and archives

Fig. 15: Criteria - Consider recordings

From	<p>Enter a start date for the period of time in which the conversations are supposed to have taken place. When executing the job, only conversations from the starting date and onwards are considered. The end date is the current date.</p> <p>You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.</p>
Data source	Select where the data of this job are supposed to come from.

6.1.3.1.2 Group field Consider Recordings Once

This group field appears in the detail view when selecting the option *Add New Period for Version* under the icon  (*Create*) in the toolbar.



This job can only be created on the basis of a released job and serves as a onetime search for data during a defined period of time. The menu item *Add New Period for Version* does not become active before an existing job has been released.

Define the period of time that conversations are supposed to be selected from.

Consider Recordings Once ▼



From 07/13/2020 📅 07:58:04 ⬆️⬆️⬆️⬆️⬆️⬆️⬆️⬆️⬆️

To 07/14/2020 📅 07:58:04 ⬆️⬆️⬆️⬆️⬆️⬆️⬆️⬆️⬆️

Data source

- ☒ only callpool
- ☐ also from expansions
- ☐ also from archives
- ☐ also from expansions and archives

Fig. 16: Criteria - Consider Recordings Once

From	Enter a start date for the period of time in which the conversations which are supposed to be archived once again have taken place. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.	
To	Enter an end date for the period of time in which the conversations which are supposed to be archived once again have taken place. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.	
Data source		
	only callpool	The path of the callpool is scanned.
	also from expansions	All system expansions are scanned including cloud storage.
	also from archives	All archives are scanned with the exception of removable media such as DVD or RDX.
	also from expansions and archives	All 3 afore-mentioned storage locations are scanned.

Once the new version of the job is released, all versions of this job created with the function *Add New Period for Version* are displayed in a table as an overview here.

Consider Recordings Once

From
07/13/2020
08:04:57

To
07/14/2020
08:04:57

Data source

☒ only callpool
☐ also from expansions
☐ also from archives
☐ also from expansions and archives

Version	Start Time	End Time
2	Jul 13, 2020 8:04:57 AM	Jul 14, 2020 8:04:57 AM

Fig. 17: Criteria - table with information about completed job

6.1.3.2 Create rule-based job

For a rule-based job, you can configure the following criteria.

<
Details*
Schedule
Criteria
Drives*

Type

☐ Bulk job
☒ Rule-based job

Behavior if no audio exists

☐ Export only XML file
☒ Skip conversation

Consider Recordings

Agents

Conversation Direction

Duration

Calling Party Phone Number

Called Party Phone Number

PBX

Additional Data

Save



Reset

Fig. 18: Configure criteria for rule-based job

6.1.3.2.1 Group field Consider Recordings

Define the period of time that conversations are supposed to be selected from.


Consider Recordings ▼

From 01/18/2019  01:29:38 


Data source

- ☒ only callpool
- ☐ also from expansions
- ☐ also from archives
- ☐ also from expansions and archives

Fig. 19: Criteria - Consider recordings

<i>From</i>	Enter a start date for the period of time in which the conversations are supposed to have taken place. When executing the job, only conversations from the starting date and onwards are considered. The end date is the current date. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.
<i>Data source</i>	Select where the data of this job are supposed to come from.

6.1.3.2.2 Group field Consider Recordings Once



This group field appears in the detail view when selecting the option *Add New Period for Version* under the icon  (*Create*) in the toolbar.





This job can only be created on the basis of a released job and serves as a onetime search for data during a defined period of time. The menu item *Add New Period for Version* does not become active before an existing job has been released.

Define the period of time that conversations are supposed to be selected from.

Consider Recordings Once ▼


From 07/13/2020  07:58:04 


To 07/14/2020  07:58:04 

Data source

- ☒ only callpool
- ☐ also from expansions
- ☐ also from archives
- ☐ also from expansions and archives

Fig. 20: Criteria - Consider Recordings Once

<i>From</i>	Enter a start date for the period of time in which the conversations which are supposed to be archived once again have taken place. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.
<i>To</i>	Enter an end date for the period of time in which the conversations which are supposed to be archived once again have taken place.

You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.

Data source

<i>only callpool</i>	The path of the callpool is scanned.
<i>also from expansions</i>	All system expansions are scanned including cloud storage.
<i>also from archives</i>	All archives are scanned with the exception of removable media such as DVD or RDX.
<i>also from expansions and archives</i>	All 3 afore-mentioned storage locations are scanned.

Once the new version of the job is released, all versions of this job created with the function *Add New Period for Version* are displayed in a table as an overview here.

Consider Recordings Once

From 07/13/2020 08:04:57

To 07/14/2020 08:04:57

Data source

☒ only callpool
☐ also from expansions
☐ also from archives
☐ also from expansions and archives

Version	Start Time	End Time
2	Jul 13, 2020 8:04:57 AM	Jul 14, 2020 8:04:57 AM

Fig. 21: Criteria - table with information about completed job

6.1.3.2.3 Group field Agents

Define whether only the conversations of certain agents are supposed to be considered.

Agents



☒ Activated

Last Name	First Name
Agent	6.
Agent	5.


Fig. 22: Criteria - Agents

Activated ☒ = Only conversations of the assigned agents are considered.

☐ = Conversations of all agents are considered. The list of the selected agents is ignored.

	Add	Opens a window in which you can select and add agents (see chapter "Add agent", p. 25).
	Remove	Removes the selected agent from the list (see chapter "Delete agent assignment", p. 25).

Add agent

1. In the tab *Criteria*, open the group field *Agents*.
2. To assign an agent, click on the icon  (*Add*).

Agents ▼

☒ Activated

Last Name ↕	First Name ↕
Agent	6.
Agent	5.

Fig. 23: Criteria - add agent

3. Select one or several agents from the list.
To revoke a selection, click on the respective line while holding the [Ctrl] key down.

Add Agents					
Employee Number ↕	First Name ↕	Last Name ↕	Login Name ↕	Date of Entry ↕	Date of Birth ↕
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			

Rows per page 20 1 - 10 of 10

Add Cancel

Fig. 24: Criteria - select agent

4. To add the selected agents, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

Delete agent assignment


1. Open the group field *Agents* in the tab *Criteria*.

Agents ▼

☒ Activated

Last Name ↕	First Name ↕
Agent	6.
Agent	5.

Fig. 25: Criteria - Delete agent assignment

- To delete the assignment of an agent to a job, select the respective agent in the list and click on the icon  (*Remove*).

6.1.3.2.4 Group field Conversation Direction

Define whether only the conversations with a certain direction are supposed to be considered.

Conversation Direction ▼

Activated ☒ ☒ Inbound
☒ Outbound
☒ Internal
☒ Unknown

Fig. 26: Criteria - Conversation direction

<i>Activated</i>	<input checked="" type="checkbox"/> = Only conversations of the selected directions are considered. <input type="checkbox"/> = Conversations of all directions are considered. Possibly marked conversation directions are ignored.
	Mark the conversation directions which are supposed be considered. The marks are only considered if the option <i>Activated</i> has been marked.

6.1.3.2.5 Group field Duration

Define whether only the conversations with a certain duration are supposed to be considered.

Duration ▼

min. (\geq) ☒ Hour(s)
 Minute(s)
 Second(s)

max. (\leq) ☒ Hour(s)
 Minute(s)
 Second(s)

Fig. 27: Criteria - Duration

<i>min. (\geq)</i>	Threshold value for the minimum duration of conversations which are supposed to be considered.
---------------------------------	--

	<input checked="" type="checkbox"/> = The minimum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is considered. Only conversations are recorded which have at least the entered duration. <input type="checkbox"/> = The minimum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is not considered.
<i>max. (<=)</i>	Threshold value for the maximum duration of conversations which are supposed to be considered. <input checked="" type="checkbox"/> = The maximum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is considered. Only conversations are recorded which have at maximum the entered duration. <input type="checkbox"/> = The maximum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is not considered.




If you have activate the minimum duration as well as the maximum duration, only conversations are considered which lie between the threshold values.

6.1.3.2.6 Group field Calling Party Phone Number

Define whether only the conversations are supposed to be considered which have been initiated by certain phone numbers.

Calling Party Phone Number ▼

☐ Activated


Calling Party Phone Number	Edit
0602150010	
0602150012222	
060215013333	

Add **Delete**

Fig. 28: Criteria - Calling Party Phone Number

Activated	<input checked="" type="checkbox"/> = Only conversations with the assigned phone numbers are considered. <input type="checkbox"/> = Conversations with all phone numbers are considered. The list of the phone numbers is ignored.
------------------	---

Phone number assignment




Add	Adds a new entry to the list. Open the new entry (<i>New Value</i>) to enter a new phone number, see Edit entry.
Delete	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see Edit entry.

6.1.3.2.7 Group field Called Party Phone Number

Define whether only the conversations to certain destination phone numbers are supposed to be considered.

Called Party Phone Number ▼

☐ Activated

Called Party Phone Number	Edit
0602150014444	
0602150015555	
0602150016666	

[Add](#) [Delete](#)


Fig. 29: Criteria - Called Party Phone Number

Activated

☒ = Only conversations with the assigned phone numbers are considered.

☐ = Conversations with all phone numbers are considered. The list of the phone numbers is ignored.

Phone number assignment

Add	Adds a new entry to the list. Open the new entry (<i>New Value</i>) to enter a new phone number, see Edit entry.
Delete	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see Edit entry.

6.1.3.2.8 Group field PBX

Define whether only the conversations of a certain **PBX** are supposed to be considered.

PBX ▼

☐ Activated

PBX

Fig. 30: Criteria - PBX

Activated

☒ = Only conversations of the selected **PBX** are considered.

☐ = Conversations of all **PBXs** are considered. A possibly selected PBX is ignored.

PBX

Select the respective **PBX** from the drop-down list if it is supposed to be considered.

6.1.3.2.9 Group field Additional Data

Define whether and which additional data is supposed to be considered for this job.

Additional Data ▼

☒ Activated

Arbitrary assignment +

Kommentar ▼ -

Please select... ▼ -

Fig. 31: Criteria - additional Data

Activated Activate the check box to limit the export to the selected additional data.

☐ = All conversations are exported.

☒ = Only conversations with the selected additional data are considered for the export.

From the drop-down list, select the additional data which is supposed to be considered.



Only those entries appear in the drop-down list which have been configured in the application System Configuration in the Additional Data module. For further information refer to the administration manual *Additional Data module*.

6.1.4

Tab Drives

In this tab, you can display and select the export drive.

< Details* Schedule Criteria **Drives*** >

Drive* + -

Fig. 32: Tab Drives

- + Opens a window in which you can select a drive, see [chapter "Assign drive", p. 29](#).
- Deletes the entry from the entry field.



A drive can be used in several job configurations as long as the drive is not used actively by a configuration.

If a drive is currently used actively by a job, no additional job which uses the same drive can be released or activated. This behavior includes all modules, i. e. regardless of the module that the configuration belongs to.



If the assigned drive is full during the execution of a job before the export job could copy all data to the drive, then the export job is paused automatically.

Information about the job status and about the status of the drive can be found in the application System Monitoring.



Basic information about using the application System Monitoring can be found in the user manual for administrators *System Monitoring*.

6.1.4.1

Assign drive

1. Click on the button + on the right of the entry field.
2. Select a drive from the list.

Drives				
Device Type ↕	Name ↕	Path ↕	Free Disk Space ↕	Server ↕
Internal harddisk	Internal harddisk	C:\	<div><div></div></div>	WIN-PP28N16CIDB
Internal harddisk	Internal harddisk	E:\	<div><div></div></div>	WIN-PP28N16CIDB

Zeilen pro Seite 20 0 - 0 von 0 < > << >>

Hinzufügen Abbrechen

Fig. 33: Add drive

- To apply the selection, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

6.2 Configure export job for MP3 + XML

6.2.1 Tab Details

- Click on the tab *Details* to configure an export job.
⇒ The draft appears in the export format MP3 + XML.

Details*
Schedule
Criteria
Drives*

Name*

MP3 +XML

Description

Status

Draft

Export format

MP3 + XML

Codec

Linear PCM16

Date format in xml

yyyy-MM-dd'T'HH:mm:ss.SSS'Z'

Activate voice disguising

☐

Cutoff of the calls (beginning)

☐ 0 Milliseconds

Cutoff of the calls (end)

☐ 0 Milliseconds

Version

1

Version/Clone of

Help

Fig. 34: Tab Details - export in MP3 format

Name Enter the name of the job configuration.

<i>Description</i>	Here, you can enter a description for the job configuration.
<i>Status</i>	<p>Enter the processing status of the job configuration. Possible options:</p> <ul style="list-style-type: none"> • <i>Draft</i> Select this status if you would like to be able to continue editing the job configuration. • <i>Released</i> Select this status if you have finished editing the job configuration. This status activates the job configuration. The job is automatically started at the point in time defined in the schedule. NOTICE! A released job configuration cannot be edited anymore. • <i>Deactivated</i> (Precondition: job configuration has been released) Select this status to deactivate the job configuration and thus the job. NOTICE! A deactivated job configuration cannot be activated again! To be able to edit or activate a deactivated job configuration, you have to create a new version of the job configuration.
<i>Export format</i>	<p>To export recordings, select the format WAV + XML from the drop-down list.</p> <p>For information about the available formats see chapter "Supported export formats", p. 8.</p>
<i>Minimum number of conversations</i>	<p>Define whether the number of conversations entered in the corresponding entry field has to be available before executing the export job. Only conversations are considered which meet the criteria of the job.</p> <p><input checked="" type="checkbox"/> = Entered number of conversations is considered. <input type="checkbox"/> = Entered number of conversations is ignored.</p> <p>If the minimum number of conversations is considered but the number has not been reached on the start date, the export job skips one export interval. If this is a job which is supposed to be executed only once, this job is not executed at all. If this is a job which is repeated periodically, it will check whether the number has been reached upon the start of the next export interval.</p>
<i>Codec</i>	<p>If you have selected the export format <i>WAVE+XML</i>, then here you have to select the codec which is supposed to be used for the export of the audio data.</p> <p>Select the codec from the drop-down list.</p> <p>For information about the available codecs see chapter "Supported export formats", p. 8.</p>
<i>Date format in xml</i>	<p>Select the format of the date and of the time from the drop-down list. When exporting recordings, the information is saved in this format in an XML file.</p> <p>The following formats are available:</p> <ul style="list-style-type: none"> • yyyy-MM-dd'T'HH:mm:ss.SSS'Z' • yyyy-MM-dd HH:mm:ss.SSS • yyyy-MM-dd'T'HH:mm:ss'Z' • yyyy-MM-dd HH:mm:ss

<i>Activate voice disguising</i>	If this check box is activated, the voices of the call participants are distorted during replay in order to render them unrecognizable while the content continues to be intelligible. Voice disguising only affects the replay, not the source data.
<i>Cutoff of the calls (beginning)</i>	If this check box is activated, the beginning of the call is cut off so that e. g. the welcome and the introduction are not replayed. In the entry field, enter how many milliseconds are supposed to be cut off at the beginning of the call. Cutoff only affects the replay, not the source data.
<i>Cutoff of the calls (end)</i>	If this check box is activated, the end of the call is cut off so that e. g. the goodbye is not replayed. In the entry field, enter how many milliseconds are supposed to be cut off at the end of the call. Cutoff only affects the replay, not the source data.
<i>Version</i>	Version number of the job configuration.
<i>Version/Clone of</i>	Job configuration from which the job configuration has been copied or cloned.

6.2.2 Tab Schedule

In this tab, you can display and edit the settings of the schedule.

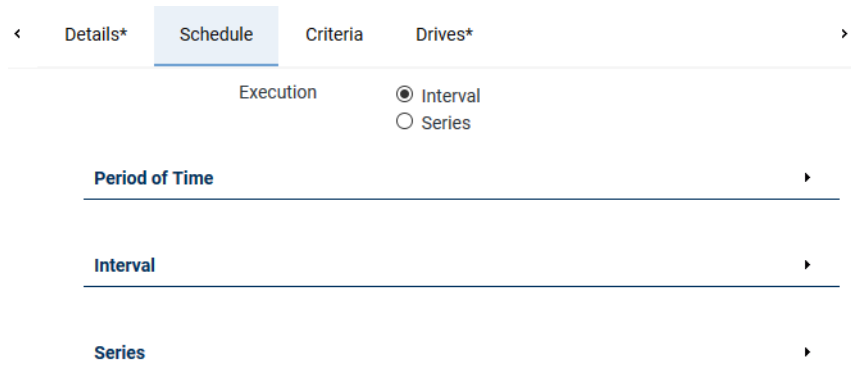


Fig. 35: Tab Schedule

<i>Execution</i>	<p>Select whether the job is supposed to be executed in specified intervals or as a series.</p> <ul style="list-style-type: none"> • <i>Interval</i> The job is repeated in specified intervals. The interval is defined in the group field <i>Interval</i>. • <i>Series</i> The job is executed on certain serial dates. These dates are defined in the group field <i>Series</i>.
------------------	---

6.2.2.1 Group field Period of Time



Define the period of time in which the job is supposed to be executed.

Period of Time ▼

Start ☒ Immediately
☐ 11/16/2018 08:10:46

End ☒ Never
☐ 11/16/2018 08:10:46

Fig. 36: Schedule - Period of Time

Start	<ul style="list-style-type: none"> Immediately The job is started immediately. Entered date The start is defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .
End	<ul style="list-style-type: none"> Never The job never ends. Entered date The end is defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .

6.2.2.2 Group field Interval

This group field is only active if the execution type *Interval* has been selected.

Define the interval in which the job is supposed to be repeated.

Interval ▼

0 Month(s) 0 Day(s) 0 Hour(s)

5 Minute(s)

Fig. 37: Schedule - Interval

You can define a certain period of time during which the job is supposed to be carried out. This offers the possibility to run export jobs during night time only, for instance.

Activate period of time Enter the period of time during which the job is supposed to be carried out.

Keep in mind that due to technical reasons those periods can only be configured on the top of the hour; half-hours are adjusted upward. This has an impact if the server containing the data to be exported is located in a time zone which differs from Coordinated Universal Time (UTC) by x 1/2 hours.



Example: Recorded data is supposed to be transferred from the export server in India (UTC + 5 1/2) to a target server in Germany during 8 pm and 10 pm Indian local time. This corresponds to 2:30 pm and 16:30 pm UTC. By adjusting the half-hour upward, the period for the export is translated into 3 pm to 5 pm which corresponds to Indian local time of 8:30 pm to 10:30 pm.

6.2.2.3 Group field Series

This group field is only active if the execution type *Series* has been selected.

Define at which points in time the job is supposed to be repeated.

Series ▼

Repeat

☐ Daily
☐ Weekly
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
☐ Sunday
☒ Monthly
☒ + -
☐ First ▼ Monday ▼

Fig. 38: Schedule - Series

Repeat	<p>Days on which the job is supposed to be executed.</p> <p><i>Daily</i> = The job is repeated daily at the entered time.</p> <p><i>Weekly</i> = The job is repeated on the selected days at the entered time. You can select one or several weekdays.</p> <p><i>Monthly</i> = The job is repeated on the selected days at the entered time. You can either select particular dates or certain days. See chapter "Configure monthly repetition on fixed dates", p. 34 and chapter "Configure monthly repetition on fixed days", p. 34.</p>
---------------	--

6.2.2.3.1 Configure monthly repetition on fixed days

1. Select the lower option:

☒ Monthly
☐ + -
☒ First ▼ Monday ▼

Fig. 39: Configure fixed days

2. In the two drop-down lists, select the day of every month on which the job is supposed to be executed.

6.2.2.3.2 Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly
☒ + -
☐ First ▼ Monday ▼

Fig. 40: Configure fixed dates

2. Click on the button + to select dates in a calendar.

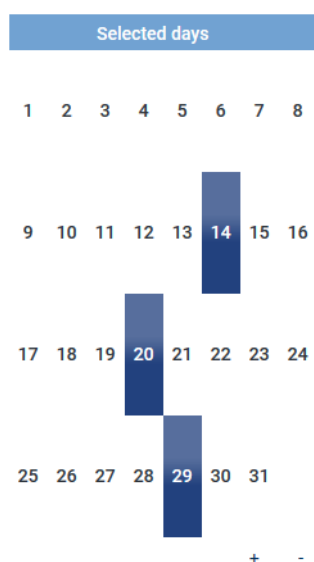


Fig. 41: Select dates

3. Click on all dates on which the job is supposed to be executed.
To revoke a selection, click on the selected date once again. The selection is deleted.
⇒ The selected dates are inserted automatically into the entry field.
4. Click on a spot outside the calendar to apply the selected dates and close the calendar.
5. If you would like to correct the selection of the dates, you can open the calendar again by clicking on the button **+**.
Adjust the dates according to the description.
6. If you would like to delete all selected dates, click on the button **-**.
⇒ All dates in the entry field are deleted.

6.2.3

Tab Criteria

In this tab, you can display and edit different criteria for the selected job configuration.

General part

Type	<p>Define whether the job is supposed to be a bulk job or a rule-based job.</p> <ul style="list-style-type: none"> • Bulk job The job type <i>bulk</i> selects all recordings of a definable period of time. You can only define a period of time and a starting delay. • Rule-based job The job type <i>rule-based</i> allows selecting conversations according to rules defined by the user. You can define several criteria in the different group fields to create individual rules.
Behavior if no audio exists	<p> <input type="radio"/> Export only XML file <input checked="" type="radio"/> Skip conversation </p>

Fig. 42: Tab Criteria

Behavior if no audio exists	<p>Define what is supposed to happen during the export when no audio file exists. The following options are available:</p> <ul style="list-style-type: none"> • Export only XML file
------------------------------------	--

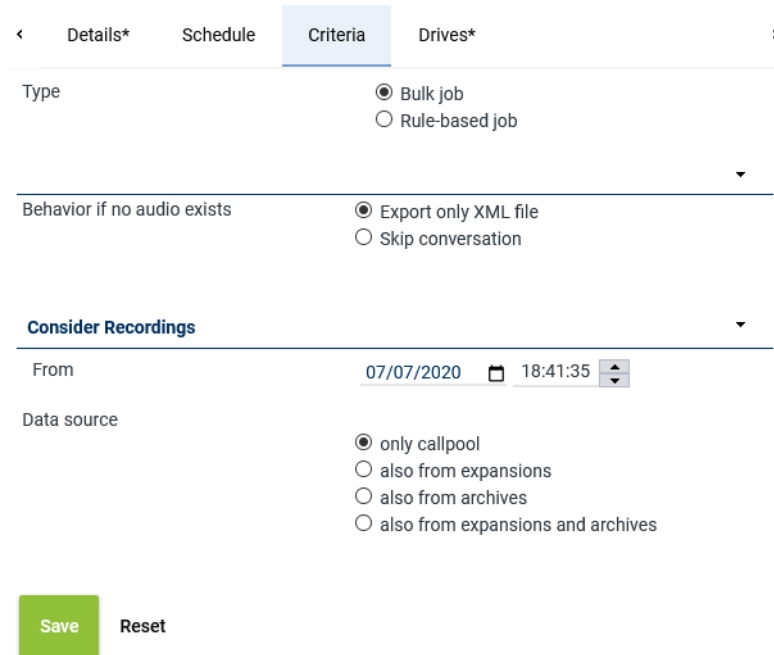
In this case, a data set with additional data will be available after the export but no corresponding audio.

- *Skip conversation*

In this case, no information will be available after the export.

6.2.3.1 Create bulk job

For a bulk job, you can configure the following criteria.

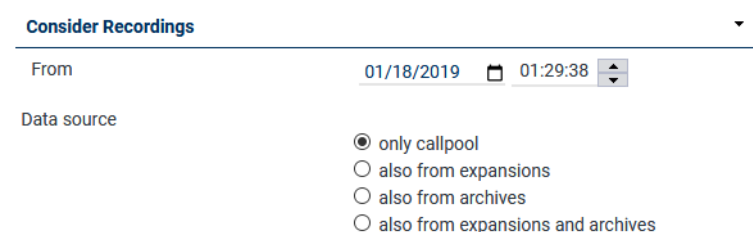


The screenshot shows the 'Criteria' tab of a configuration interface. At the top, there are four tabs: 'Details*', 'Schedule', 'Criteria' (which is active), and 'Drives*'. Below the tabs, the 'Type' section has two radio buttons: 'Bulk job' (selected) and 'Rule-based job'. The 'Behavior if no audio exists' section has two radio buttons: 'Export only XML file' (selected) and 'Skip conversation'. A section titled 'Consider Recordings' is expanded, showing a 'From' date and time set to '07/07/2020 18:41:35' with a calendar icon and a time selector. Below this, the 'Data source' section has four radio buttons: 'only callpool' (selected), 'also from expansions', 'also from archives', and 'also from expansions and archives'. At the bottom left, there are two buttons: a green 'Save' button and a 'Reset' button.

Fig. 43: Configure criteria for the bulk job


6.2.3.1.1 Group field Consider Recordings

Define the period of time that conversations are supposed to be selected from.




This screenshot shows the 'Consider Recordings' section of the configuration interface. It features a 'From' field with a date and time set to '01/18/2019 01:29:38', accompanied by a calendar icon and a time selector. Below this, the 'Data source' section has four radio buttons: 'only callpool' (selected), 'also from expansions', 'also from archives', and 'also from expansions and archives'.

Fig. 44: Criteria - Consider recordings

<i>From</i>	<p>Enter a start date for the period of time in which the conversations are supposed to have taken place. When executing the job, only conversations from the starting date and onwards are considered. The end date is the current date.</p> <p>You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.</p>
<i>Data source</i>	Select where the data of this job are supposed to come from.

6.2.3.1.2 Group field Consider Recordings Once

This group field appears in the detail view when selecting the option *Add New Period for Version* under the icon  (*Create*) in the toolbar.




This job can only be created on the basis of a released job and serves as a onetime search for data during a defined period of time. The menu item *Add New Period for Version* does not become active before an existing job has been released.

Define the period of time that conversations are supposed to be selected from.


Consider Recordings Once

From

07/13/2020




07:58:04




To

07/14/2020





07:58:04



Data source

☒ only callpool
 ☐ also from expansions
 ☐ also from archives
 ☐ also from expansions and archives

Fig. 45: Criteria - Consider Recordings Once

From	Enter a start date for the period of time in which the conversations which are supposed to be archived once again have taken place. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.	
To	Enter an end date for the period of time in which the conversations which are supposed to be archived once again have taken place. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.	
Data source		
	only callpool	The path of the callpool is scanned.
	also from expansions	All system expansions are scanned including cloud storage.
	also from archives	All archives are scanned with the exception of removable media such as DVD or RDX.
	also from expansions and archives	All 3 afore-mentioned storage locations are scanned.

Once the new version of the job is released, all versions of this job created with the function *Add New Period for Version* are displayed in a table as an overview here.

Consider Recordings Once

From
07/13/2020
08:04:57

To
07/14/2020
08:04:57

Data source

☒ only callpool
☐ also from expansions
☐ also from archives
☐ also from expansions and archives

Version	Start Time	End Time
2	Jul 13, 2020 8:04:57 AM	Jul 14, 2020 8:04:57 AM

Fig. 46: Criteria - table with information about completed job

6.2.3.2 Create rule-based job

For a rule-based job, you can configure the following criteria.

<
Details*
Schedule
Criteria
Drives*

Type

☐ Bulk job
☒ Rule-based job

Behavior if no audio exists

☐ Export only XML file
☒ Skip conversation

Consider Recordings

Agents

Conversation Direction

Duration

Calling Party Phone Number

Called Party Phone Number

PBX

Additional Data

Save

Reset

Fig. 47: Configure criteria for rule-based job

6.2.3.2.1 Group field Consider Recordings

Define the period of time that conversations are supposed to be selected from.

Consider Recordings

From 01/18/2019 📅 01:29:38 ⬆️⬆️⬆️

Data source

- ☒ only callpool
- ☐ also from expansions
- ☐ also from archives
- ☐ also from expansions and archives

Fig. 48: Criteria - Consider recordings

<i>From</i>	Enter a start date for the period of time in which the conversations are supposed to have taken place. When executing the job, only conversations from the starting date and onwards are considered. The end date is the current date. You can enter the date directly in both entry fields via the keyboard, via the icon 📅 or via the arrow keys.
<i>Data source</i>	Select where the data of this job are supposed to come from.

6.2.3.2.2 Group field Consider Recordings Once

This group field appears in the detail view when selecting the option *Add New Period for Version* under the icon + (Create) in the toolbar.



This job can only be created on the basis of a released job and serves as a onetime search for data during a defined period of time. The menu item *Add New Period for Version* does not become active before an existing job has been released.

Define the period of time that conversations are supposed to be selected from.

Consider Recordings Once

From 07/13/2020 📅 07:58:04 ⬆️⬆️⬆️


To 07/14/2020 📅 07:58:04 ⬆️⬆️⬆️

Data source

- ☒ only callpool
- ☐ also from expansions
- ☐ also from archives
- ☐ also from expansions and archives

Fig. 49: Criteria - Consider Recordings Once

<i>From</i>	Enter a start date for the period of time in which the conversations which are supposed to be archived once again have taken place. You can enter the date directly in both entry fields via the keyboard, via the icon 📅 or via the arrow keys.
<i>To</i>	Enter an end date for the period of time in which the conversations which are supposed to be archived once again have taken place.

You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.

Data source

<i>only callpool</i>	The path of the callpool is scanned.
<i>also from expansions</i>	All system expansions are scanned including cloud storage.
<i>also from archives</i>	All archives are scanned with the exception of removable media such as DVD or RDX.
<i>also from expansions and archives</i>	All 3 afore-mentioned storage locations are scanned.

Once the new version of the job is released, all versions of this job created with the function *Add New Period for Version* are displayed in a table as an overview here.

Consider Recordings Once

From 07/13/2020 08:04:57

To 07/14/2020 08:04:57

Data source

☒ only callpool
☐ also from expansions
☐ also from archives
☐ also from expansions and archives

Version	Start Time	End Time
2	Jul 13, 2020 8:04:57 AM	Jul 14, 2020 8:04:57 AM

Fig. 50: Criteria - table with information about completed job

6.2.3.2.3 Group field Agents

Define whether only the conversations of certain agents are supposed to be considered.

Agents



☒ Activated

Last Name	First Name
Agent	6.
Agent	5.


Fig. 51: Criteria - Agents

Activated ☒ = Only conversations of the assigned agents are considered.

☐ = Conversations of all agents are considered. The list of the selected agents is ignored.

	Add	Opens a window in which you can select and add agents (see chapter "Add agent", p. 41).
	Remove	Removes the selected agent from the list (see chapter "Delete agent assignment", p. 41).

Add agent

1. In the tab *Criteria*, open the group field *Agents*.
2. To assign an agent, click on the icon  (*Add*).

Agents ▼

☒ Activated

Last Name ↕	First Name ↕
Agent	6.
Agent	5.

Fig. 52: Criteria - add agent

3. Select one or several agents from the list.
To revoke a selection, click on the respective line while holding the [Ctrl] key down.

Add Agents					
Employee Number ↕	First Name ↕	Last Name ↕	Login Name ↕	Date of Entry ↕	Date of Birth ↕
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			

Rows per page 20 1 - 10 of 10

Add Cancel

Fig. 53: Criteria - select agent

4. To add the selected agents, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

Delete agent assignment


1. Open the group field *Agents* in the tab *Criteria*.

Agents ▼

☒ Activated

Last Name ↕	First Name ↕
Agent	6.
Agent	5.

Fig. 54: Criteria - Delete agent assignment

- To delete the assignment of an agent to a job, select the respective agent in the list and click on the icon  (*Remove*).

6.2.3.2.4 Group field Conversation Direction

Define whether only the conversations with a certain direction are supposed to be considered.

Conversation Direction ▼

Activated ☒ ☒ Inbound
☒ Outbound
☒ Internal
☒ Unknown

Fig. 55: Criteria - Conversation direction

<i>Activated</i>	<input checked="" type="checkbox"/> = Only conversations of the selected directions are considered. <input type="checkbox"/> = Conversations of all directions are considered. Possibly marked conversation directions are ignored.
	Mark the conversation directions which are supposed be considered. The marks are only considered if the option <i>Activated</i> has been marked.

6.2.3.2.5 Group field Duration

Define whether only the conversations with a certain duration are supposed to be considered.

Duration ▼

min. (\geq) ☒ Hour(s)
 Minute(s)
 Second(s)

max. (\leq) ☒ Hour(s)
 Minute(s)
 Second(s)

Fig. 56: Criteria - Duration

<i>min. (\geq)</i>	Threshold value for the minimum duration of conversations which are supposed to be considered.
---------------------------------	--

	<input checked="" type="checkbox"/> = The minimum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is considered. Only conversations are recorded which have at least the entered duration. <input type="checkbox"/> = The minimum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is not considered.
<i>max. (<=)</i>	Threshold value for the maximum duration of conversations which are supposed to be considered. <input checked="" type="checkbox"/> = The maximum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is considered. Only conversations are recorded which have at maximum the entered duration. <input type="checkbox"/> = The maximum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is not considered.




If you have activate the minimum duration as well as the maximum duration, only conversations are considered which lie between the threshold values.

6.2.3.2.6 Group field Calling Party Phone Number

Define whether only the conversations are supposed to be considered which have been initiated by certain phone numbers.

Calling Party Phone Number ▼

☐ Activated


Calling Party Phone Number	Edit
0602150010	
0602150012222	
060215013333	

Add **Delete**

Fig. 57: Criteria - Calling Party Phone Number

Activated	<input checked="" type="checkbox"/> = Only conversations with the assigned phone numbers are considered. <input type="checkbox"/> = Conversations with all phone numbers are considered. The list of the phone numbers is ignored.
------------------	---

Phone number assignment




Add	Adds a new entry to the list. Open the new entry (<i>New Value</i>) to enter a new phone number, see Edit entry.
Delete	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see Edit entry.

6.2.3.2.7 Group field Called Party Phone Number

Define whether only the conversations to certain destination phone numbers are supposed to be considered.

Called Party Phone Number ▼

☐ Activated


Called Party Phone Number	Edit
0602150014444	
0602150015555	
0602150016666	

[Add](#) [Delete](#)

Fig. 58: Criteria - Called Party Phone Number

Activated	<input checked="" type="checkbox"/> = Only conversations with the assigned phone numbers are considered. <input type="checkbox"/> = Conversations with all phone numbers are considered. The list of the phone numbers is ignored.
------------------	---

Phone number assignment

Add	Adds a new entry to the list. Open the new entry (<i>New Value</i>) to enter a new phone number, see Edit entry.
Delete	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see Edit entry.

6.2.3.2.8 Group field PBX

Define whether only the conversations of a certain **PBX** are supposed to be considered.

PBX ▼

☐ Activated

PBX ▼

Fig. 59: Criteria - PBX

Activated	<input checked="" type="checkbox"/> = Only conversations of the selected PBX are considered. <input type="checkbox"/> = Conversations of all PBXs are considered. A possibly selected PBX is ignored.
PBX	Select the respective PBX from the drop-down list if it is supposed to be considered.

6.2.3.2.9 Group field Additional Data

Define whether and which additional data is supposed to be considered for this job.

Additional Data ▼

☒ Activated

Arbitrary assignment +

<input type="text"/>	Kommentar	▼	⊖
<input type="text"/>	Please select...	▼	⊖

Fig. 60: Criteria - additional Data

Activated Activate the check box to limit the export to the selected additional data.

☐ = All conversations are exported.

☒ = Only conversations with the selected additional data are considered for the export.

From the drop-down list, select the additional data which is supposed to be considered.



Only those entries appear in the drop-down list which have been configured in the application System Configuration in the Additional Data module. For further information refer to the administration manual *Additional Data module*.

6.2.4

Tab Drives

In this tab, you can display and select the export drive.

< Details* Schedule Criteria **Drives*** >

Drive* + -

Fig. 61: Tab Drives

- + Opens a window in which you can select a drive, see [chapter "Assign drive", p. 29](#).
- Deletes the entry from the entry field.



A drive can be used in several job configurations as long as the drive is not used actively by a configuration.

If a drive is currently used actively by a job, no additional job which uses the same drive can be released or activated. This behavior includes all modules, i. e. regardless of the module that the configuration belongs to.



If the assigned drive is full during the execution of a job before the export job could copy all data to the drive, then the export job is paused automatically.

Information about the job status and about the status of the drive can be found in the application System Monitoring.



Basic information about using the application System Monitoring can be found in the user manual for administrators *System Monitoring*.

6.3

Configure export job for neo Conversation

6.3.1

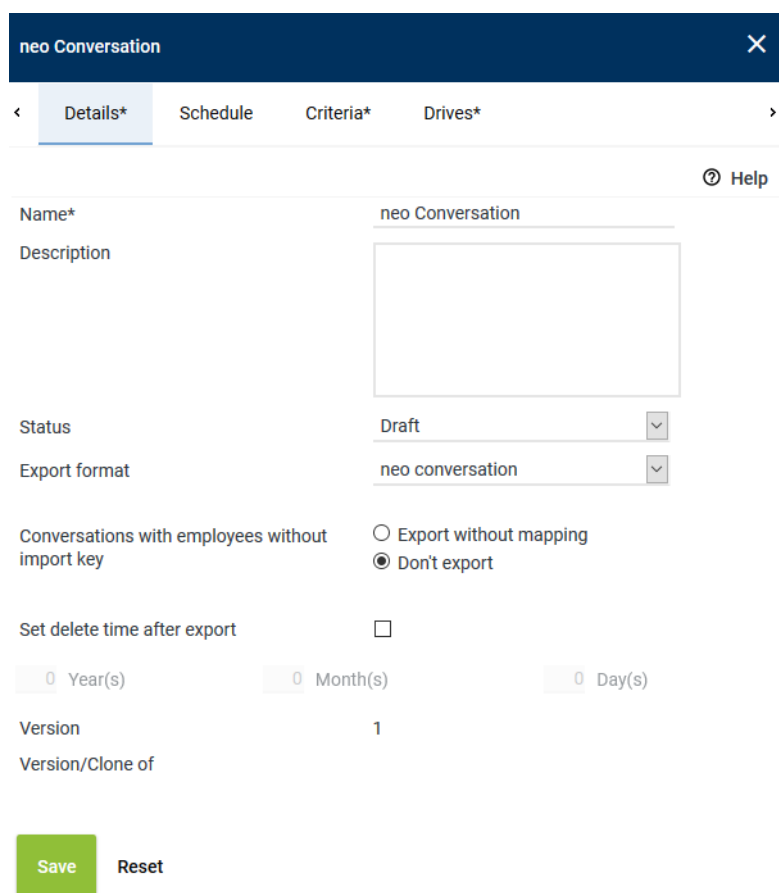
Tab Details

1. Click on the tab *Details* to configure an export job.

⇒ The draft appears in the export format WAV + XML.

- To configure an export job in the export format neo Conversation, select the export format neo Conversation from the drop-down list.

The following parameters appear:



neo Conversation [X]

< **Details*** Schedule Criteria* Drives* >

[?] Help

Name* neo Conversation

Description

Status Draft

Export format neo conversation

Conversations with employees without import key ☐ Export without mapping ☒ Don't export

Set delete time after export ☐

0 Year(s) 0 Month(s) 0 Day(s)

Version 1

Version/Clone of

Save Reset

Fig. 62: Tab Details - Export in neo Conversation format

Name	Enter the name of the job configuration.
Description	Here, you can enter a description for the job configuration.
Status	<p>Enter the processing status of the job configuration. Possible options:</p> <ul style="list-style-type: none"> • Draft Select this status if you would like to be able to continue editing the job configuration. • Released Select this status if you have finished editing the job configuration. This status activates the job configuration. The job is automatically started at the point in time defined in the schedule. NOTICE! A released job configuration cannot be edited anymore. • Deactivated (Precondition: job configuration has been released) Select this status to deactivate the job configuration and thus the job. NOTICE! A deactivated job configuration cannot be activated again! To be able to edit or activate a deactivated job configuration, you have to create a new version of the job configuration.

<i>Export format</i>	<p>To export recordings, select the format <u>neo</u> Conversation from the drop-down list.</p> <p>For information about the available formats see chapter "Supported export formats", p. 8.</p>
<i>Conversations with employees without import key</i>	<p>Define whether conversations without a mapping are supposed to be exported.</p> <p><input checked="" type="radio"/> Export without mapping</p> <p>The conversations are exported without a mapping and thus cannot be mapped to an agent. As no additional data is available, only users who can see all recordings can see the recordings after an export.</p> <p><input type="radio"/> Don't export</p> <p>Only conversations with a mapping are exported. A subsequent mapping of the exported conversations after an import can only take place if the agents are identical in the destination system.</p>
<i>Set delete time after export</i>	<p>Activate this check box to define a period after which the exported data is supposed to be deleted on the source system. The following entry fields become active and can be configured:</p> <ul style="list-style-type: none"> • Year(s) • Month(s) • Day(s)
<i>Version</i>	Version number of the job configuration.
<i>Version/Clone of</i>	Job configuration from which the job configuration has been copied or cloned.

6.3.2

Tab Schedule

In this tab, you can display and edit the settings of the schedule.

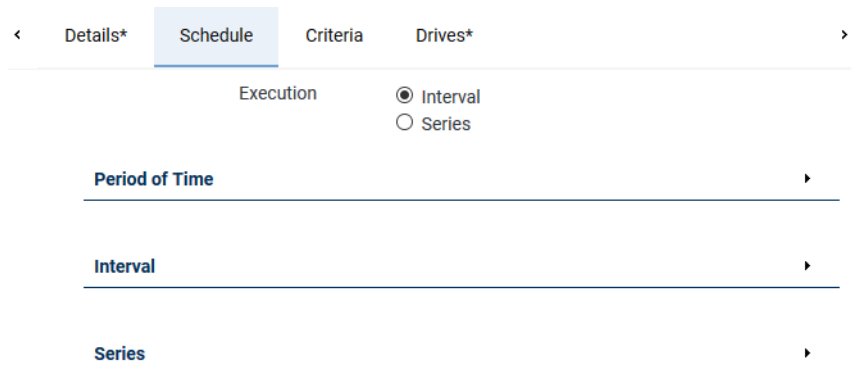


Fig. 63: Tab Schedule

<i>Execution</i>	<p>Select whether the job is supposed to be executed in specified intervals or as a series.</p> <ul style="list-style-type: none"> • <i>Interval</i> <p>The job is repeated in specified intervals. The interval is defined in the group field <i>Interval</i>.</p> • <i>Series</i> <p>The job is executed on certain serial dates. These dates are defined in the group field <i>Series</i>.</p>
------------------	---

6.3.2.1 Group field Period of Time



Define the period of time in which the job is supposed to be executed.

Period of Time ▼

Start ☒ Immediately
☐ 11/16/2018 08:10:46

End ☒ Never
☐ 11/16/2018 08:10:46

Fig. 64: Schedule - Period of Time

Start	<ul style="list-style-type: none"> Immediately The job is started immediately. Entered date The start is defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .
End	<ul style="list-style-type: none"> Never The job never ends. Entered date The end is defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .

6.3.2.2 Group field Interval

This group field is only active if the execution type *Interval* has been selected.

Define the interval in which the job is supposed to be repeated.

Interval ▼

0 Month(s) 0 Day(s) 0 Hour(s)

5 Minute(s)

Fig. 65: Schedule - Interval

You can define a certain period of time during which the job is supposed to be carried out. This offers the possibility to run export jobs during night time only, for instance.

Activate period of time Enter the period of time during which the job is supposed to be carried out.

Keep in mind that due to technical reasons those periods can only be configured on the top of the hour; half-hours are adjusted upward. This has an impact if the server containing the data to be exported is located in a time zone which differs from Coordinated Universal Time (UTC) by x 1/2 hours.



Example: Recorded data is supposed to be transferred from the export server in India (UTC + 5 1/2) to a target server in Germany during 8 pm and 10 pm Indian local time. This corresponds to 2:30 pm and 16:30 pm UTC. By adjusting the half-hour upward, the period for the export is translated into 3 pm to 5 pm which corresponds to Indian local time of 8:30 pm to 10:30 pm.

6.3.2.3 Group field Series

This group field is only active if the execution type *Series* has been selected.

Define at which points in time the job is supposed to be repeated.

Series ▼

Repeat

☐ Daily
☐ Weekly
☐ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday
☐ Sunday
☒ Monthly
☒ + -
☐ First ▼ Monday ▼

Fig. 66: Schedule - Series

Repeat	<p>Days on which the job is supposed to be executed.</p> <p><i>Daily</i> = The job is repeated daily at the entered time.</p> <p><i>Weekly</i> = The job is repeated on the selected days at the entered time. You can select one or several weekdays.</p> <p><i>Monthly</i> = The job is repeated on the selected days at the entered time. You can either select particular dates or certain days. See chapter "Configure monthly repetition on fixed dates", p. 49 and chapter "Configure monthly repetition on fixed days", p. 49.</p>
---------------	--

6.3.2.3.1 Configure monthly repetition on fixed days

1. Select the lower option:

☒ Monthly
☐ + -
☒ First ▼ Monday ▼

Fig. 67: Configure fixed days

2. In the two drop-down lists, select the day of every month on which the job is supposed to be executed.

6.3.2.3.2 Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly
☒ + -
☐ First ▼ Monday ▼

Fig. 68: Configure fixed dates

2. Click on the button + to select dates in a calendar.

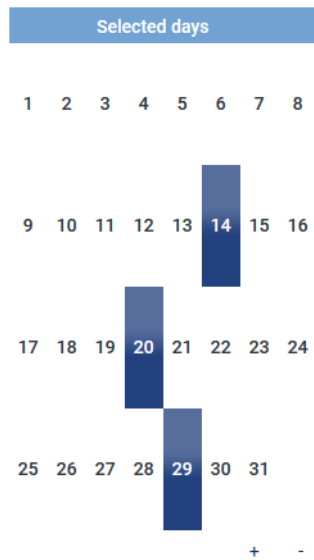


Fig. 69: Select dates

3. Click on all dates on which the job is supposed to be executed.
To revoke a selection, click on the selected date once again. The selection is deleted.
⇒ The selected dates are inserted automatically into the entry field.
4. Click on a spot outside the calendar to apply the selected dates and close the calendar.
5. If you would like to correct the selection of the dates, you can open the calendar again by clicking on the button **+**.
Adjust the dates according to the description.
6. If you would like to delete all selected dates, click on the button **-**.
⇒ All dates in the entry field are deleted.

6.3.3

Tab Criteria

In this tab, you can display and edit different criteria for the selected job configuration.

General part

<i>Type</i>	<p>Define whether the job is supposed to be a bulk job or a rule-based job.</p> <ul style="list-style-type: none"> • <i>Bulk job</i> The job type <i>bulk</i> selects all recordings of a definable period of time. You can only define a period of time and a starting delay. • <i>Rule-based job</i> The job type <i>rule-based</i> allows selecting conversations according to rules defined by the user. You can define several criteria in the different group fields to create individual rules.
Behavior if no audio exists	<p> <input type="radio"/> Export only XML file <input checked="" type="radio"/> Skip conversation </p>

Fig. 70: Tab Criteria

<i>Behavior if no audio exists</i>	<p>Define what is supposed to happen during the export when no audio file exists. The following options are available:</p> <ul style="list-style-type: none"> • <i>Export only XML file</i>
------------------------------------	--

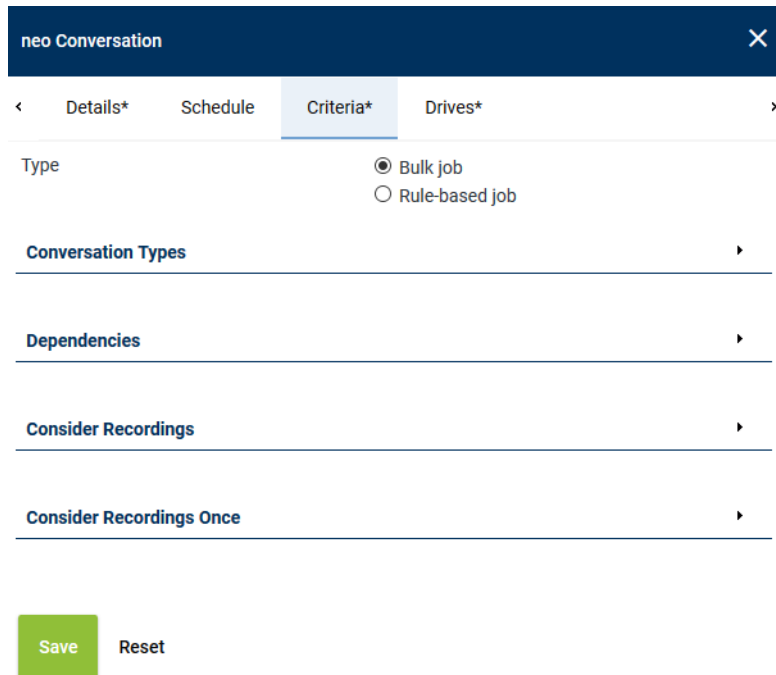
In this case, a data set with additional data will be available after the export but no corresponding audio.

- *Skip conversation*

In this case, no information will be available after the export.

6.3.3.1 Create bulk job

For a bulk job, you can configure the following criteria.



The screenshot shows the 'neo Conversation' configuration window with the 'Criteria*' tab selected. The window has a dark blue header with a close button. Below the header are four tabs: 'Details*', 'Schedule', 'Criteria*', and 'Drives*'. The 'Criteria*' tab is active, showing the following options:

- Type**: Radio buttons for 'Bulk job' (selected) and 'Rule-based job'.
- Conversation Types**: A section with a right-pointing arrow.
- Dependencies**: A section with a right-pointing arrow.
- Consider Recordings**: A section with a right-pointing arrow.
- Consider Recordings Once**: A section with a right-pointing arrow.

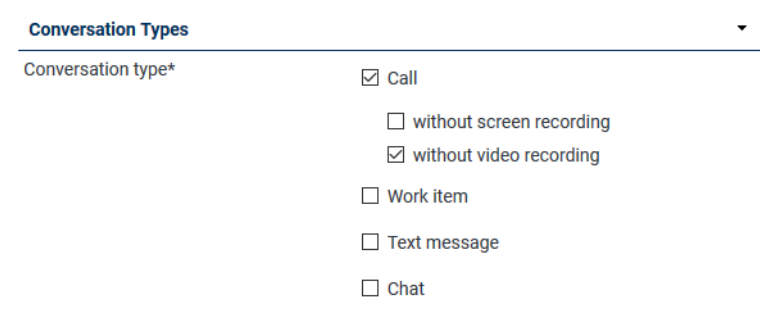
At the bottom left, there are two buttons: a green 'Save' button and a 'Reset' button.

Fig. 71: Configure criteria for the bulk job

6.3.3.1.1 Group field Conversation Types

This group field is only available for the export format *neo* Conversation as only this export format allows exporting different conversation types.

Define which type of recordings is supposed to be considered.



The screenshot shows the 'Conversation Types' configuration section. It has a title bar with a dropdown arrow. Below the title bar is a list of conversation types with checkboxes:

- ☒ Call
 - ☐ without screen recording
 - ☒ without video recording
- ☐ Work item
- ☐ Text message
- ☐ Chat

Fig. 72: Criteria - conversation types

- *Call*
 - Conversations with screen recordings (audio with screen or video call)
 - *Call without screen recording*
Only video calls
 - *Call without video recording*
Only calls with screen recording

- *Call + Call without screen recording + Call without video recording*
Mere call recordings (only audio)
- *Work item*
Mere screen recording (only video)
- *Text message*
SMS recordings
- *Chat*
Recordings of chat messages
- *Call + Work item + Text message + Chat*
All recordings regardless of the conversation type.

6.3.3.1.2 Group field Dependencies

Select the cases in which recordings are supposed to be exported.



Fig. 73: Criteria - dependencies

- *Export without compression, too*
☒ = Even uncompressed recordings are exported.
☐ = Only compressed recordings are exported.

NOTICE! This feature only works if you have licensed and activated compression. After an update, you must save the settings of this parameter again to ensure that only the compressed recordings are continued to be considered during an export.

6.3.3.1.3 Group field Consider Recordings

Define the period of time that conversations are supposed to be selected from.

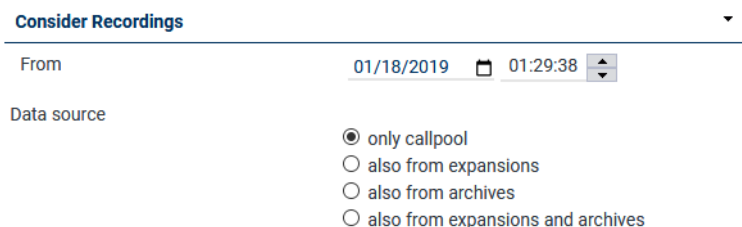




Fig. 74: Criteria - Consider recordings

<i>From</i>	Enter a start date for the period of time in which the conversations are supposed to have taken place. When executing the job, only conversations from the starting date and onwards are considered. The end date is the current date. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.
<i>Data source</i>	Select where the data of this job are supposed to come from.

6.3.3.1.4 Group field Consider Recordings Once

This group field appears in the detail view when selecting the option *Add New Period for Version* under the icon  (*Create*) in the toolbar.




This job can only be created on the basis of a released job and serves as a onetime search for data during a defined period of time. The menu item *Add New Period for Version* does not become active before an existing job has been released.

Define the period of time that conversations are supposed to be selected from.


Consider Recordings Once

From

07/13/2020




07:58:04




To

07/14/2020





07:58:04



Data source

☒ only callpool
 ☐ also from expansions
 ☐ also from archives
 ☐ also from expansions and archives

Fig. 75: Criteria - Consider Recordings Once

From	Enter a start date for the period of time in which the conversations which are supposed to be archived once again have taken place. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.	
To	Enter an end date for the period of time in which the conversations which are supposed to be archived once again have taken place. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.	
Data source		
	only callpool	The path of the callpool is scanned.
	also from expansions	All system expansions are scanned including cloud storage.
	also from archives	All archives are scanned with the exception of removable media such as DVD or RDX.
	also from expansions and archives	All 3 afore-mentioned storage locations are scanned.

Once the new version of the job is released, all versions of this job created with the function *Add New Period for Version* are displayed in a table as an overview here.

Consider Recordings Once

From

07/13/2020

08:04:57

To

07/14/2020

08:04:57

Data source

☒ only callpool

☐ also from expansions

☐ also from archives

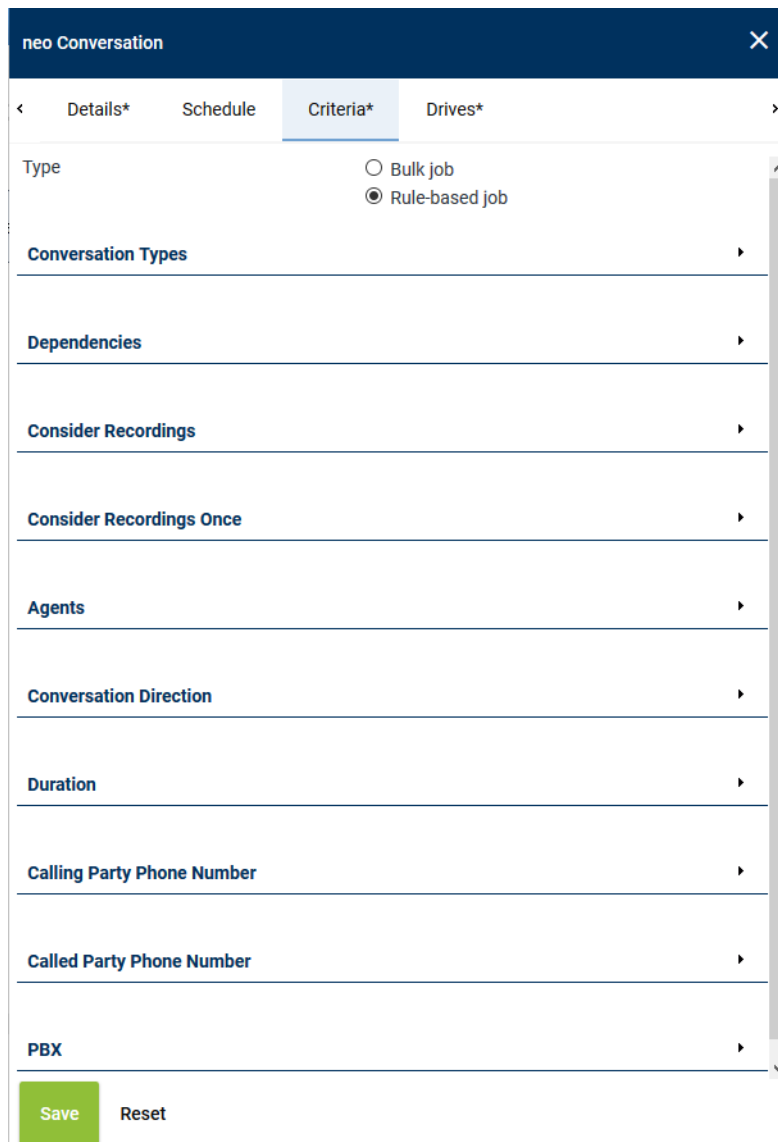
☐ also from expansions and archives

Version	Start Time	End Time
2	Jul 13, 2020 8:04:57 AM	Jul 14, 2020 8:04:57 AM

Fig. 76: Criteria - table with information about completed job

6.3.3.2 Create rule-based job

For a rule-based job, you can configure the following criteria.



neo Conversation

< Details* Schedule Criteria* Drives* >

Type ☐ Bulk job ☒ Rule-based job

Conversation Types

Dependencies

Consider Recordings

Consider Recordings Once

Agents

Conversation Direction

Duration

Calling Party Phone Number

Called Party Phone Number

PBX

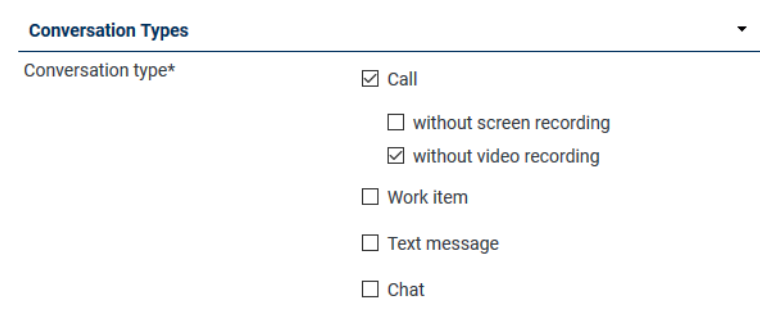
Save Reset

Fig. 77: Configure criteria for rule-based job

6.3.3.2.1 Group field Conversation Types

This group field is only available for the export format *neo* Conversation as only this export format allows exporting different conversation types.

Define which type of recordings is supposed to be considered.



Conversation Types

Conversation type*

☒ Call

☐ without screen recording

☒ without video recording

☐ Work item

☐ Text message

☐ Chat

Fig. 78: Criteria - conversation types

- *Call*
 - Conversations with screen recordings (audio with screen or video call)
 - *Call without screen recording*

Only video calls

– *Call without video recording*

Only calls with screen recording

- *Call + Call without screen recording + Call without video recording*

Mere call recordings (only audio)

- *Work item*

Mere screen recording (only video)

- *Text message*

SMS recordings

- *Chat*

Recordings of chat messages

- *Call + Work item + Text message + Chat*

All recordings regardless of the conversation type.

6.3.3.2.2 Group field Dependencies

Select the cases in which recordings are supposed to be exported.



Fig. 79: Criteria - dependencies

- *Export without compression, too*

☒ = Even uncompressed recordings are exported.

☐ = Only compressed recordings are exported.

NOTICE! This feature only works if you have licensed and activated compression. After an update, you must save the settings of this parameter again to ensure that only the compressed recordings are continued to be considered during an export.

6.3.3.2.3 Group field Consider Recordings

Define the period of time that conversations are supposed to be selected from.

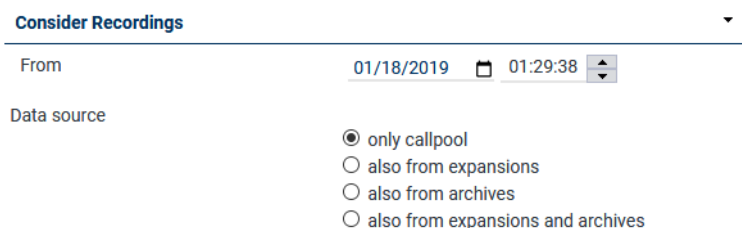

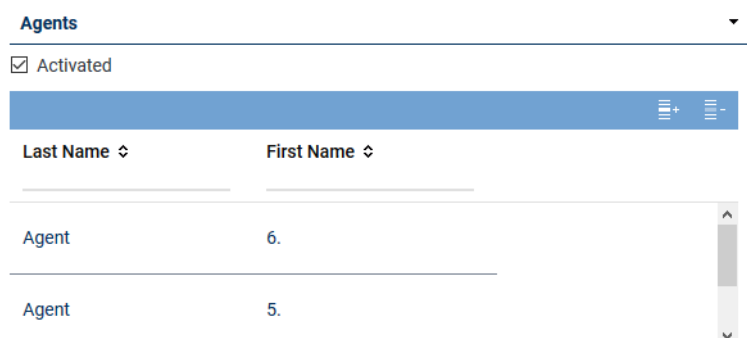


Fig. 80: Criteria - Consider recordings

From	Enter a start date for the period of time in which the conversations are supposed to have taken place. When executing the job, only conversations from the starting date and onwards are considered. The end date is the current date. You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.
Data source	Select where the data of this job are supposed to come from.

6.3.3.2.4 Group field Agents

Define whether only the conversations of certain agents are supposed to be considered.





Last Name	First Name
Agent	6.
Agent	5.


Fig. 81: Criteria - Agents

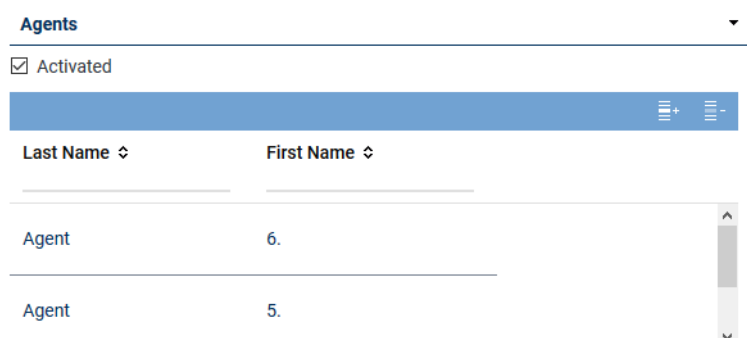
Activated

- ☒ = Only conversations of the assigned agents are considered.
- ☐ = Conversations of all agents are considered. The list of the selected agents is ignored.

	Add	Opens a window in which you can select and add agents (see chapter "Add agent", p. 57).
	Remove	Removes the selected agent from the list (see chapter "Delete agent assignment", p. 58).

Add agent

1. In the tab *Criteria*, open the group field *Agents*.
2. To assign an agent, click on the icon  (*Add*).



Last Name	First Name
Agent	6.
Agent	5.

Fig. 82: Criteria - add agent

3. Select one or several agents from the list.
To revoke a selection, click on the respective line while holding the [Ctrl] key down.

Add Agents
✕

📄
🔍

Employee Number ↕	First Name ↕	Last Name ↕	Login Name ↕	Date of Entry ↕	Date of Birth ↕
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			

Rows per page 20 ▾
1 - 10 of 10
⏪ ⏩ ⏴ ⏵

Add
Cancel

Fig. 83: Criteria - select agent

- To add the selected agents, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

Delete agent assignment


- Open the group field *Agents* in the tab *Criteria*.

Agents
▾

☒ Activated
⋮

Last Name ↕	First Name ↕
Agent	6.
Agent	5.

Fig. 84: Criteria - Delete agent assignment

- To delete the assignment of an agent to a job, select the respective agent in the list and click on the icon  (*Remove*).

6.3.3.2.5 Group field Conversation Direction

Define whether only the conversations with a certain direction are supposed to be considered.

Conversation Direction
▾

Activated

☒ ☒ Inbound
☒ Outbound
☒ Internal
☒ Unknown

Fig. 85: Criteria - Conversation direction

Activated ☒ = Only conversations of the selected directions are considered.

☐ = Conversations of all directions are considered. Possibly marked conversation directions are ignored.

Mark the conversation directions which are supposed be considered. The marks are only considered if the option *Activated* has been marked.

6.3.3.2.6 Group field Duration

Define whether only the conversations with a certain duration are supposed to be considered.

Duration		
min. (>=)	<input checked="" type="checkbox"/>	0 Hour(s)
		45 Minute(s)
		0 Second(s)
max. (<=)	<input checked="" type="checkbox"/>	2 Hour(s)
		0 Minute(s)
		0 Second(s)

Fig. 86: Criteria - Duration

<i>min. (>=)</i>	<p>Threshold value for the minimum duration of conversations which are supposed to be considered.</p> <p><input checked="" type="checkbox"/> = The minimum duration entered in the fields <i>Hour(s)</i>, <i>Minute(s)</i> and <i>Second(s)</i> is considered. Only conversations are recorded which have at least the entered duration.</p> <p><input type="checkbox"/> = The minimum duration entered in the fields <i>Hour(s)</i>, <i>Minute(s)</i> and <i>Second(s)</i> is not considered.</p>
<i>max. (<=)</i>	<p>Threshold value for the maximum duration of conversations which are supposed to be considered.</p> <p><input checked="" type="checkbox"/> = The maximum duration entered in the fields <i>Hour(s)</i>, <i>Minute(s)</i> and <i>Second(s)</i> is considered. Only conversations are recorded which have at maximum the entered duration.</p> <p><input type="checkbox"/> = The maximum duration entered in the fields <i>Hour(s)</i>, <i>Minute(s)</i> and <i>Second(s)</i> is not considered.</p>




If you have activate the minimum duration as well as the maximum duration, only conversations are considered which lie between the threshold values.

6.3.3.2.7 Group field Called Party Phone Number

Define whether only the conversations to certain destination phone numbers are supposed to be considered.

Called Party Phone Number ▼

☐ Activated

Called Party Phone Number	Edit
0602150014444	
0602150015555	
0602150016666	

[Add](#) [Delete](#)


Fig. 87: Criteria - Called Party Phone Number

Activated

☒ = Only conversations with the assigned phone numbers are considered.

☐ = Conversations with all phone numbers are considered. The list of the phone numbers is ignored.

Phone number assignment




Add	Adds a new entry to the list. Open the new entry (<i>New Value</i>) to enter a new phone number, see Edit entry.
Delete	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see Edit entry.

6.3.3.2.8 Group field Calling Party Phone Number

Define whether only the conversations are supposed to be considered which have been initiated by certain phone numbers.

Calling Party Phone Number ▼

☐ Activated

Calling Party Phone Number	Edit
0602150010	
0602150012222	
060215013333	

[Add](#) [Delete](#)

Fig. 88: Criteria - Calling Party Phone Number


Activated

☒ = Only conversations with the assigned phone numbers are considered.

☐ = Conversations with all phone numbers are considered. The list of the phone numbers is ignored.

Phone number assignment

Add	Adds a new entry to the list.
---------------------	-------------------------------

	Open the new entry (<i>New Value</i>) to enter a new phone number, see Edit entry.
Delete	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see Edit entry.

6.3.3.2.9 Group field PBX

Define whether only the conversations of a certain **PBX** are supposed to be considered.

PBX ▼

☐ Activated

PBX ▼

Fig. 89: Criteria - PBX

Activated	<input checked="" type="checkbox"/> = Only conversations of the selected PBX are considered. <input type="checkbox"/> = Conversations of all PBXs are considered. A possibly selected PBX is ignored.
PBX	Select the respective PBX from the drop-down list if it is supposed to be considered.

6.3.3.2.10 Group field Additional Data

Define whether and which additional data is supposed to be considered for this job.

Additional Data ▼

☒ Activated

Arbitrary assignment +

Kommentar ▼ -

Please select... ▼ -

Fig. 90: Criteria - additional Data

Activated	Activate the check box to limit the export to the selected additional data. <input type="checkbox"/> = All conversations are exported. <input checked="" type="checkbox"/> = Only conversations with the selected additional data are considered for the export. From the drop-down list, select the additional data which is supposed to be considered.
------------------	---



Only those entries appear in the drop-down list which have been configured in the application System Configuration in the Additional Data module. For further information refer to the administration manual *Additional Data module*.

6.3.4 Tab Drives

In this tab, you can display and select the export drive.

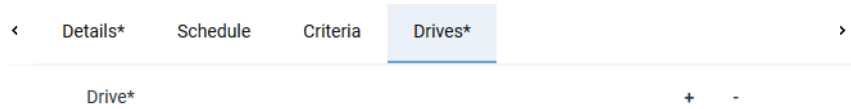


Fig. 91: Tab Drives

+	Opens a window in which you can select a drive, see chapter "Assign drive", p. 29 .
-	Deletes the entry from the entry field.



A drive can be used in several job configurations as long as the drive is not used actively by a configuration.

If a drive is currently used actively by a job, no additional job which uses the same drive can be released or activated. This behavior includes all modules, i. e. regardless of the module that the configuration belongs to.



If the assigned drive is full during the execution of a job before the export job could copy all data to the drive, then the export job is paused automatically.

Information about the job status and about the status of the drive can be found in the application System Monitoring.



Basic information about using the application System Monitoring can be found in the user manual for administrators *System Monitoring*.

7 Edit job configuration

1. In the main view, select the job configuration you would like to edit.
⇒ All settings for the selected job configuration are displayed in the detail view.



You can only edit a job configuration as long as it has the status *Draft*.

2. Adjust all necessary settings within the 4 tabs.
You can change tabs without buffering. The settings are not lost.
 - *Details*, see [chapter "Tab Details", p. 13](#)
 - *Criteria*, see [chapter "Tab Criteria", p. 19](#)
 - *Drives*, see [chapter "Tab Drives", p. 29](#)
 - *Schedule*, see [chapter "Tab Schedule", p. 15](#)
3. To save the settings, click on the button *Save*.
To reset all settings or changes in all tabs, click on the button *Reset*.
To cancel the editing of the job configuration, click on the main view and confirm the security prompt.

8

Start export

To start an export job, you can set the status in the tab *Details* to *Released*.

- *Draft*

This status has been set by default while creating a job. As long as the status is Draft you can edit the configuration.

- *Released*

Select this status if you have finished editing the job configuration. This status activates the job configuration.

The job is automatically started at the point in time defined in the schedule.

NOTICE! A released job configuration cannot be edited anymore.

- *Deactivated*

(Precondition: job configuration has been released)

Select this status to deactivate the job configuration and thus the job.

NOTICE! A deactivated job configuration cannot be activated again! To be able to edit or activate a deactivated job configuration, you have to create a new version of the job configuration.

By clicking in the menu item *Export* in the toolbar of the main view, you can select the following options manually.

<i>Export</i>	<i>Start</i>	Starts the selected job if it has been paused before with the function <i>Pause job</i> . The job is executed again according to the settings in the tab <i>Schedule</i> .
	<i>Pause Job</i>	Pauses the selected job.

1. To save the settings, click on the button *Save*.

To reset all settings or changes in all tabs, click on the button *Reset*.

To cancel the editing of the job configuration, click on the main view and confirm the security prompt.



When having activated the function *Post-compression* and having created an export job that is supposed to export the compressed data to a [NAS](#), you must create a new version of the export job after updating the [neo](#). It is not sufficient to only save the job again. If you do not create a new version of the export job, the data is not compressed before being exported.



If an export job fails, you are informed about this at the following locations in the [neo](#) system:

- In the application Portal, you receive a respective notification if the generation of such a notification has been activated in the Notifications module of the application System Configuration.

In the application System Monitoring, you receive information about the job status in the Jobs module.



For basic information about the Notifications module refer to the administration manual for tenants *Notifications module*.



Basic information about using the application System Monitoring can be found in the user manual for administrators *System Monitoring*.

9 Cancel export

9 Cancel export

Every export job is automatically stopped at the point in time defined in the schedule, see [chapter "Tab Schedule", p. 15](#).

Upon stopping an export job, the job configuration is set to the status *Deactivated*.

If you would like to stop an export job at a different time than defined in the schedule, you must manually set the job configuration to the status *Deactivated*, see [chapter "Tab Details", p. 13](#).

List of figures

Fig. 1	Export - main view	9
Fig. 2	Export formats	10
Fig. 3	Toolbar	10
Fig. 4	Window Search Criteria (example)	11
Fig. 5	Tab Details - Export in WAVE format.....	14
Fig. 6	Tab Schedule	16
Fig. 7	Schedule - Period of Time.....	16
Fig. 8	Schedule - Interval	17
Fig. 9	Schedule - Series.....	17
Fig. 10	Configure fixed days	18
Fig. 11	Configure fixed dates	18
Fig. 12	Select dates	18
Fig. 13	Tab Criteria	19
Fig. 14	Configure criteria for the bulk job	20
Fig. 15	Criteria - Consider recordings	20
Fig. 16	Criteria - Consider Recordings Once	21
Fig. 17	Criteria - table with information about completed job	22
Fig. 18	Configure criteria for rule-based job.....	22
Fig. 19	Criteria - Consider recordings	23
Fig. 20	Criteria - Consider Recordings Once	23
Fig. 21	Criteria - table with information about completed job	24
Fig. 22	Criteria - Agents	24
Fig. 23	Criteria - add agent	25
Fig. 24	Criteria - select agent	25
Fig. 25	Criteria - Delete agent assignment.....	26
Fig. 26	Criteria - Conversation direction.....	26
Fig. 27	Criteria - Duration	26
Fig. 28	Criteria - Calling Party Phone Number.....	27
Fig. 29	Criteria - Called Party Phone Number.....	28
Fig. 30	Criteria - PBX	28
Fig. 31	Criteria - additional Data	29
Fig. 32	Tab Drives	29
Fig. 33	Add drive	30
Fig. 34	Tab Details - export in MP3 format	30
Fig. 35	Tab Schedule	32
Fig. 36	Schedule - Period of Time.....	33
Fig. 37	Schedule - Interval	33
Fig. 38	Schedule - Series.....	34
Fig. 39	Configure fixed days	34
Fig. 40	Configure fixed dates	34
Fig. 41	Select dates	35

Fig. 42	Tab Criteria	35
Fig. 43	Configure criteria for the bulk job	36
Fig. 44	Criteria - Consider recordings	36
Fig. 45	Criteria - Consider Recordings Once	37
Fig. 46	Criteria - table with information about completed job	38
Fig. 47	Configure criteria for rule-based job	38
Fig. 48	Criteria - Consider recordings	39
Fig. 49	Criteria - Consider Recordings Once	39
Fig. 50	Criteria - table with information about completed job	40
Fig. 51	Criteria - Agents	40
Fig. 52	Criteria - add agent	41
Fig. 53	Criteria - select agent	41
Fig. 54	Criteria - Delete agent assignment	42
Fig. 55	Criteria - Conversation direction	42
Fig. 56	Criteria - Duration	42
Fig. 57	Criteria - Calling Party Phone Number	43
Fig. 58	Criteria - Called Party Phone Number	44
Fig. 59	Criteria - PBX	44
Fig. 60	Criteria - additional Data	45
Fig. 61	Tab Drives	45
Fig. 62	Tab Details - Export in \$neo\$ Conversation format	46
Fig. 63	Tab Schedule	47
Fig. 64	Schedule - Period of Time	48
Fig. 65	Schedule - Interval	48
Fig. 66	Schedule - Series	49
Fig. 67	Configure fixed days	49
Fig. 68	Configure fixed dates	49
Fig. 69	Select dates	50
Fig. 70	Tab Criteria	50
Fig. 71	Configure criteria for the bulk job	51
Fig. 72	Criteria - conversation types	51
Fig. 73	Criteria - dependencies	52
Fig. 74	Criteria - Consider recordings	52
Fig. 75	Criteria - Consider Recordings Once	53
Fig. 76	Criteria - table with information about completed job	54
Fig. 77	Configure criteria for rule-based job	55
Fig. 78	Criteria - conversation types	55
Fig. 79	Criteria - dependencies	56
Fig. 80	Criteria - Consider recordings	56
Fig. 81	Criteria - Agents	57
Fig. 82	Criteria - add agent	57
Fig. 83	Criteria - select agent	58

Fig. 84	Criteria - Delete agent assignment.....	58
Fig. 85	Criteria - Conversation direction.....	58
Fig. 86	Criteria - Duration.....	59
Fig. 87	Criteria - Called Party Phone Number.....	60
Fig. 88	Criteria - Calling Party Phone Number.....	60
Fig. 89	Criteria - PBX	61
Fig. 90	Criteria - additional Data	61
Fig. 91	Tab Drives.....	62

List of tables

Glossary

μ-law

PCM digitization method for analog audio signals according to ITU G.711. In the process, analog voice signals are converted into digital signals by means of a logarithmic quantization characteristic. The μ-law algorithm is used in the US while the A-law algorithm is the standard in Europe.

A-law

PCM digitization method for analog audio signals according to ITU G.711. In the process, analog voice signals are converted into digital signals by means of a logarithmic quantization characteristic. The A-law algorithm is used in Europe while the μ-law algorithm is the standard in the US.

ASCFS

ASC File System. A proprietary file system of ASC for DVD-RAM media.

Codec

Code/Decode implementation of a method for transforming from coded/decoded data to decoded or coded data

MP3

Description of the digitally saved audio data. MP3 compression works by reducing (or approximating) the accuracy of certain components of sound that are considered (by psychoacoustic analysis) to be beyond the hearing capabilities of most humans. The remaining audio information is then recorded in a space-efficient manner. (Source: Wikipedia 9th July 2020)

NAS

Network Attached Storage is a file-level computer data storage server connected to a computer network providing data access to other devices on the network. NAS is usually used to provide independent storage capacity in a computer network without major effort. (Source: Wikipedia 4th May 2017)

PBX

Private Branch Exchange

PCM

Pulse Code Modulation is an uncompressed pulse modulation method which transforms a time- and value-continuous analog signal into a time- and value-discrete digital signal. It is used in audio technology, for example in the context of the G.711 standard and in video technology for digital video signals in compliance with the ITU-R BT 601 standard. (Source: Wikipedia 12th June 2018)

WAVE

The WAVE file format is a container format to digitally save audio files. It is based on the Resource Interchange File Format (RIFF) which is defined by Microsoft for Windows. A WAVE file already contains information about the format of the audio data before the audio data are actually stored.

XML

Extensible Markup Language is a human-readable and machine-readable language which defines a set of rules for encoding documents.