

Administration guideline



Administration manual for system providers and tenants

8/19/2020

Product line neo, version 6.x

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

EVOIPneo

EVOLUTIONneo / XXL / eco

INSPIRATIONneo

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	4
2	Introduction	5
3	Administration guideline for system providers	7
3.1	Database backup	11
3.1.1	Internal database	11
3.1.2	External databases	11
3.2	Recording content validation	11
3.3	Recording Check Mechanism	12
4	Administration guideline for tenants	13
5	Troubleshooting	16
5.1	GetLogsClient	16
	List of figures	17
	List of tables	18
	Glossary	19

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

Administration manuals describe (subsequent) adjustments to the system according to the individual conditions.

Administration manuals are meant for technicians and system administrators of the system providers and the tenants.

The title page of the administration manuals indicates the target group (*system providers* or *tenants*).

Every *neo* system is initially installed as a 1-tenant system with one predefined tenant, the 1st-tenant. For the system provider, a tenant is created automatically, too. However, the system provider cannot be considered a tenant in the true sense of the word.

For the respective administrators of the system provider and of the predefined tenant, an account with the following login data is created during the installation of the system by default:

Login data for the administrator of the system provider:

User name:	<i>system-admin</i>
<i>neo</i> version < 6.3	
Default password:	1
	If the default password 1 has never been changed before a software update to a <i>neo</i> version ≥ 6.3 , the password must be changed upon the next login or by entering it again. If the default password has already been changed before a software update to a <i>neo</i> version ≥ 6.3 , the changed password remains.
<i>neo</i> version ≥ 6.3	
Default password:	A\$c123

Tab. 1: Login data - system provider

Login data for the administrator of the 1st tenant:

User name:	<i>1st-tenant-admin</i>
<i>neo</i> version < 6.3	
Default password:	1
	If the default password 1 has never been changed before a software update to a <i>neo</i> version ≥ 6.3 , the password must be changed upon the next login or by entering it again. If the default password has already been changed before a software update to a <i>neo</i> version ≥ 6.3 , the changed password remains.
<i>neo</i> version ≥ 6.3	
Default password:	A\$c123

Tab. 2: Login data - 1st tenant

Depending on the licensing, the recording system is operated as a 1-tenant system or as a multi-tenant system. In a 1-tenant system, there is only the predefined tenant; no other tenants can be created. In a multi-tenant system, the system provider can create as many additional tenants as there are tenant licenses in the system.

The administration guideline offers an overview of all steps which are necessary or possible for the administration of the recording system as well as the information which manuals are relevant.

Part of the administration falls under the responsibility of the system provider. Information about these topics can be found in Administration guideline for system providers.

Part of the administration falls under the responsibility of the different tenants. Information about these topics can be found in Administration guideline for tenants.



Manuals are updated in regular intervals. The manuals on the provided manual CD correspond with the current version at the time of delivery. The latest versions can be found in the ASC partner portal in the Information and Download Center.

Administration guideline for system providers

The following configurations have to be implemented by the system provider:

Description of the task	Keywords	Manual
Create and administrate tenants	<ul style="list-style-type: none"> • Contact data • System availability • Assign PBX and extensions • Release Web Service functions 	<ul style="list-style-type: none"> • <i>User management (for system providers)</i>
Administrate own tenant account	<ul style="list-style-type: none"> • Password rules • Notification settings • SMTP account (optional) • SSO login (optional) • LDAP login (optional) • SNMP GET (optional) 	
Create and administrate own users	<ul style="list-style-type: none"> • Personal data • Account configuration • Function rights • Roles 	<ul style="list-style-type: none"> • <i>License administration</i>
NOTICE! Users which have been allocated directly to a tenant are created by the administrator of the respective tenant.		
Install, assign, and administrate licenses		
Configure and manage drives	<ul style="list-style-type: none"> • Usage of the drives • Write protection • Post compression • Format drive • Assign capacity 	<ul style="list-style-type: none"> • <i>Configuration drives</i>
Create integrations	<ul style="list-style-type: none"> • Create and activate recording architectures • Configure servers • Configure PBX 	<p>Individual manuals are available for the configuration of the different integrations. These manuals can be found in the sub-directories of the following directory:</p> <ul style="list-style-type: none"> • <i>Administration\System_Provider\Integrations</i>

Description of the task	Keywords	Manual
	<ul style="list-style-type: none"> • Create integration in the recording system • Configure integration 	
Install EVOIP ^{neo} passive software for recording VoIP calls (optional)		<ul style="list-style-type: none"> • <i>Switch configuration passive VoIP recording</i>
Configure PHONE ^{apps} (optional)	<ul style="list-style-type: none"> • Configure PBX • Configure end devices • Configure PHONE^{app} in the recording system 	<p>Individual manuals are available for the configuration of the different PHONE^{app} solutions. These manuals can be found in the following directory:</p> <ul style="list-style-type: none"> • <i>Administration\System_Provider\PHONEapps</i>
Create additional data of the recordings		<ul style="list-style-type: none"> • <i>Additional Data module</i>
Change the IP address of a recording server subsequently (optional)	<ul style="list-style-type: none"> • Change IP address • Install certificate • Update certificate 	<ul style="list-style-type: none"> • <i>Configuration IP address change</i>
Activate function <i>Last Call Repeat</i> (optional)		<ul style="list-style-type: none"> • <i>Configuration Last Call Repeat Facility</i>
Activate function <i>Replay via phone</i> (optional)		<ul style="list-style-type: none"> • <i>Configuration replay via phone</i> (Manual for system providers and tenants)
Create system notifications (optional)	<ul style="list-style-type: none"> • Recipient of notifications • Notification storage • Meaning of notifications • SNMP trap 	<ul style="list-style-type: none"> • <i>Notifications module (for system providers)</i>
Import recordings (optional)	<ul style="list-style-type: none"> • Import of WAVE formats 	<ul style="list-style-type: none"> • <i>Import of recordings</i>
Edit and adjust texts of the user interface (optional)		<ul style="list-style-type: none"> • <i>Resource Editor</i>
Edit and change the layout of time formats (optional)	<ul style="list-style-type: none"> • Language-related formats 	<ul style="list-style-type: none"> • <i>Configuration time formats</i>
Create alarm jobs to monitor the recording functionality	<ul style="list-style-type: none"> • Monitoring recording functionality 	<ul style="list-style-type: none"> • <i>Activity Guard</i>

Description of the task	Keywords	Manual
Import configuration data (optional)	<ul style="list-style-type: none"> • Import employees • Import user data • Import phones • Recording Check Mechanism 	<ul style="list-style-type: none"> • <i>Import of configuration data</i> (Manual for system providers and tenants) • <i>Import of user data</i> (Manual for system providers and tenants) • <i>Import of phone configurations</i> • <i>XSLT management</i> (Manual for system providers and tenants)
Manage XSLT files (optional)	<ul style="list-style-type: none"> • Import XSLT files • Edit XSLT files • XSLT templates • Default XSLT files 	<ul style="list-style-type: none"> • <i>XSLT management</i> (Manual for system providers and tenants)
Configure encryption of recordings (optional)	<ul style="list-style-type: none"> • Simple key management • - <u>neo</u> key management • Key management • Redundant password database 	<ul style="list-style-type: none"> • <i>Encryption of recordings</i>
Migrating data from a V10 recording system to a <u>neo</u> recording system (optional)	<ul style="list-style-type: none"> • Migration • Export • Import • XSLT management • ASC legacy storage • ASC legacy integration • ASC legacy archive medium 	<ul style="list-style-type: none"> • <i>Migration</i> • <i>XSLT management</i> (Manual for system providers and tenants)
Applying data from a <u>neo</u> recording system to a <u>neo</u> recording system (optional)	<ul style="list-style-type: none"> • Import recordings • Export recordings 	<ul style="list-style-type: none"> • <i>Export and import from neo to neo</i> (Manual for system providers and tenants)
Rebuild of recordings (optional)	<ul style="list-style-type: none"> • Rebuild • Import 	<p>Closes the gap between the latest database backup and the latest current recording.</p> <ul style="list-style-type: none"> • <i>Rebuild of recordings</i> (manual for system providers)
Set up feature <i>Free Seating</i>		<ul style="list-style-type: none"> • <i>Configuration Free Seating</i>

Description of the task	Keywords	Manual
(optional)		(Manual for system providers and tenants)
Configure speech analysis to be used with the <i>neo</i> recording system (optional)	<ul style="list-style-type: none"> Emotion detection Speech analysis Transcription EML Transcription Server 	<ul style="list-style-type: none"> <i>Configuration speech analysis</i>
Initiate failover operation manually (optional)		<ul style="list-style-type: none"> <i>Database Manager</i>
Adjust the interface to your corporate identity (so-called “white labeling”).		<ul style="list-style-type: none"> <i>Style Editor module</i> (Manuals for system providers and tenants)

Tab. 3: Administration by the system provider

To adjust the **configuration of servers and recording architectures** subsequently, check the following manual for information:



· **Administration manual for system providers** *Configuration servers and recording architectures*

(Keywords: Standby management, assign servers, activate recording control, activate monitoring, virtualization, media streamer, applet address mapping, server usage, system storage synchronization, data processing, data transfer)



For information about how to set up the **failover operation of PostgreSQL databases** refer to the **installation manual** *Failover operation for PostgreSQL databases*.



For Microsoft SQL databases, we support the high-availability AlwaysOn Failover Cluster Instances and AlwaysOn Availability Groups. The MS SQL functionality *Dynamic Ports* is not supported for always-on.

Configure the failover operation according to the manual of the manufacturer.

3.1 Database backup



If you would like to re-install the *neo* software on a running system or on a defective one (e. g. after a hard disk crash), you have to install the latest database backup. That way, the former tenant ID is transferred and old archive media can be replayed.

Contact your local ASC support or call ASC support at +49 700 27278776.

3.1.1 Internal database



The periods of time indicated in the following description are the default values which are set automatically upon installation. If required, you can change the periods of time via the administration tool for the database.

During the installation of the provided PostgreSQL database of the *neo* recording software, a backup job is created for the PostgreSQL database which covers the last 5 days.

By default, you find the files in the following directory:

- %ASCDATA%\DatabaseBackup\



Information about the restoration of the PostgreSQL database can be found at <http://www.pgadmin.org/docs/dev/restore.html>.

3.1.2 External databases

There is no predefined backup process for external databases.

When using an external database, you will find information about backups in the manuals of the respective manufacturer.



Information about the backup and restoration of a Microsoft SQL database can be found at <http://msdn.microsoft.com/en-us/library/ms187510.aspx>.



For information about the backup and restoration of a PostgreSQL database refer to <http://www.pgadmin.org/docs/dev/backup.html> or to <http://www.pgadmin.org/docs/dev/restore.html>.

3.2 Recording content validation

Validating recording content offers insights into the recorded data. The validity of the audio content is checked.

During the validation process, the recording content is checked whether the encrypted data stream could be decrypted successfully.

If the recording contains distorted audio signals a notification is issued. This works almost in real time; results are available shortly after the recording has started.

The notification *RECORDING_STREAM_DECRYPTION_ERROR* must be configured in the Notifications module.



For information about how to configure notifications refer to the administration manual for system providers *Notifications module*.

For recording validation, a report template can be created which can be used by the tenant as well.



For information about how to create report templates refer to the user manual INSIGHT*neo* - *Report Templates module*.

3.3 Recording Check Mechanism

The feature Recording Check Mechanism serves to detect whether the conversations conducted on the [PBX](#) have been recorded correctly.

The additional data of the conversation which have been conducted on the [PBX](#) are written into log files by the [PBX](#). The log files are imported to the [neo](#) server and compared with the saved recordings. That way, it is possible to detect whether there has been a loss of recordings and which conversations are missing.

The feature is currently available for the following integrations:

- [Cisco UCM](#)
- Skype for Business ([SfB](#))



For more information about the configuration refer to the administration manual *Import of configuration data*.

4 Administration guideline for tenants

The following configurations have to be implemented by the tenants:

Description of the task	Keywords	Manual
Administrate own tenant account	<ul style="list-style-type: none"> • Password rules • Notification settings • SMTP account (optional) • Key management • LDAP (optional) • Web Service 	<ul style="list-style-type: none"> • <i>User management (for tenants)</i>
Create and administrate own users	<ul style="list-style-type: none"> • User data • Personal data • Account configuration • Function rights • Roles • Organization structures • Filter display of conversations • Conversation rules • Predefined function packages (e. g. superuser, agent, coaching advisor) 	
Display information about the licenses and administrate warn levels		<ul style="list-style-type: none"> • <i>Licensing module</i>
Display and adjust information about the drives	<ul style="list-style-type: none"> • Write protection • Formatting 	<ul style="list-style-type: none"> • <i>Drives module</i>
Activate function <i>Replay via phone</i> (optional)		<ul style="list-style-type: none"> • <i>Configuration replay via phone</i> (Manual for system providers and tenants)
Set up the function <i>Live Listening</i> for agents (optional)		<ul style="list-style-type: none"> • <i>User management (for tenants)</i>
Create system notifications (optional)	<ul style="list-style-type: none"> • Recipient of notifications • Notification storage 	<ul style="list-style-type: none"> • <i>Notifications module (for tenants)</i>

Description of the task	Keywords	Manual
	<ul style="list-style-type: none"> • Meaning of notifications • SNMP trap 	
Create and administrate recording plans	<ul style="list-style-type: none"> • Compliance recording plan • Quality management recording plan • Control recording automatically • Control recording externally • Screen recording filter (optional) • Define DTMF sequences (optional) 	<ul style="list-style-type: none"> • <i>Recording Planner</i>
Configure operation mode for PHONE <u>apps</u> (optional)		<ul style="list-style-type: none"> • <i>Recording Planner</i>
Configure Time to live (TTL)	<ul style="list-style-type: none"> • Delete recordings • Delete date • Delete time 	<ul style="list-style-type: none"> • <i>Recording Planner</i> • <i>Sessions module</i> (optional)
Archive recordings (optional)		<ul style="list-style-type: none"> • <i>Archiving of recordings</i>
Export recordings (optional)	<ul style="list-style-type: none"> • Export in WAVE format 	<ul style="list-style-type: none"> • <i>Export of recordings</i>
Applying data from a neo recording system to a neo recording system (optional)	<ul style="list-style-type: none"> • Import recordings • Export recordings • Import/Export neo/neo 	<ul style="list-style-type: none"> • <i>Export and import from neo to neo</i> (Manual for system providers and tenants)
Reconstruct damaged archiving media (optional)		<ul style="list-style-type: none"> • <i>Reconstruction of media</i>
Configure application CLIENT <u>command</u> (optional)		<ul style="list-style-type: none"> • <i>Configuration CLIENTcommand</i>
Configure application POWER <u>play</u> Instant (optional)		<ul style="list-style-type: none"> • <i>Configuration POWERplay Instant</i>
Import configuration data (optional)	<ul style="list-style-type: none"> • Import employees • Import user data • Import organization structures 	<ul style="list-style-type: none"> • <i>Import of configuration data</i> (Manual for system providers and tenants)

Description of the task	Keywords	Manual
	<ul style="list-style-type: none"> • Import agent skills • Import evaluation templates • Import evaluations • Import Call Director customer survey results 	<ul style="list-style-type: none"> • <i>Import of user data</i> (Manual for system providers and tenants) • <i>XSLT management</i> (Manual for system providers and tenants)
Manage XSLT files (optional)	<ul style="list-style-type: none"> • Import XSLT files • Edit XSLT files • XSLT templates • Default XSLT files 	<ul style="list-style-type: none"> • <i>XSLT management</i> (Manual for system providers and tenants)
Create and administrate rating schemes for evaluations in INSPIRATION ^{neo} (optional)		<ul style="list-style-type: none"> • <i>Rating schemes management</i>
Configure interface for the Teleopti software (optional)	<ul style="list-style-type: none"> • Workforce management (WFM) • Deployment planning 	<ul style="list-style-type: none"> • <i>Configuration Teleopti interface</i>
Migrating data from a V10 recording system to a ^{neo} recording system (optional)	<ul style="list-style-type: none"> • Migration • Export • Import • XSLT management • ASC legacy storage • ASC legacy integration • ASC legacy archive medium 	<ul style="list-style-type: none"> • <i>Migration</i> • <i>XSLT management</i> (Manuals for system providers and tenants)
Set up feature <i>Free Seating</i> (optional)		<ul style="list-style-type: none"> • <i>Configuration Free Seating</i> (Manual for system providers and tenants)
Define reference processes for work items. (optional)	<ul style="list-style-type: none"> • Workflow templates • SCREEN^{miner} 	<ul style="list-style-type: none"> • <i>SCREENminer Rules</i>
Adjust the interface to your corporate identity (so-called “white labeling”).		<ul style="list-style-type: none"> • <i>Style Editor module</i> (Manuals for system providers and tenants)

Tab. 4: Administration by the tenants

5 Troubleshooting



If problems with the installed software or inexplicable error messages occur, please contact your local ASC support or the ASC support by calling +49 700 27278776.

If required, you can use the program *GetLogsClient* to compile log and configuration files in an archive.

5.1 GetLogsClient

The program *GetLogsClient* allows compiling different log files in an archive.



A description of the functions can be found in the online help of the program *GetLogsClient*.

The program is located in the installation directory of the *neo* software under *ASC\ASC Product Suite\scripts*.

To be able to use the program in its entire extent, you have to execute the following configuration steps in the operating system:

1. Open the *Windows Explorer* in the taskbar.
2. Enter *GetLogsClient* in the search field. The search starts automatically after having entered the query.
3. Right-click on the search result *GetLogsClient.exe*.
⇒ A context menu appears.
4. Click on *Properties* in the context menu.
5. Click on the tab *Compatibility*.
6. Activate the check box *Run this program in compatibility mode for:* .
7. From the drop-down list *Run this program in compatibility mode for*, select the option *Windows Vista* or *Windows 7*.
8. Activate the check box *Run program as an administrator*.
9. Click on the button *OK* to save the settings and to close the window.

List of figures

List of tables

Tab. 1	Login data - system provider	5
Tab. 2	Login data - 1st tenant	5
Tab. 3	Administration by the system provider	7
Tab. 4	Administration by the tenants	13

Glossary

Cisco UCM

Cisco Unified Communications Manager is a server-based IP telephony solution.

DTMF

Dialed Dual Tone Multi Frequency keys represent dialing signals on the analog connecting cable of the telephone. This is a method to transmit the phone number to the telephone network or to a PBX.

IP

Internet Protocol, basic protocol for Internet communication

LDAP

Lightweight Directory Access Protocol

PBX

Private Branch Exchange

SfB

Skype for Business

SMTP

Simple Mail Transfer Protocol is a protocol which serves to send e-mails in computer networks.

SNMP

Simple Network Management Protocol is a network protocol and serves to monitor and manage network components. The protocol does not depend on the IP network protocol for the transport. It sends notifications (traps) about the activities on the network components on its own accord.

SSO

Single Sign On; Simplified login mode. After a one-off authentication at one workplace users will be able to use all services and applications that they have been authorized for from this workplace. They do not have to authenticate for the individual applications again.

TTL

Time to Live is the retention period indication for how long a recording is supposed to be held available in the system.

VoIP

Voice over IP

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.

WFM

Workforce Management

XSLT

XSL Transformation, short XSLT, is a programming language to transform XML documents. XSLT is based on the logical tree structure of an XML document and serves to define transformation rules. XSLT programs, so-called XSLT style sheets, are designed according to the XML standard rules. (Source: Wikipedia 22nd March 2017) The style sheets are read in by dedicated software, the XSLT processors, which transform one or several XML documents into the respective output format based on these instructions.