

Export and import from neo to neo



Administration manual for system providers and tenants

7/13/2020

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>.

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2 Introduction

This document describes the preconditions and the procedure to transfer recordings from an ASC recording system version *neo* to another ASC recording system version *neo* in *neo* Conversation import format. To be able to import recordings in the ASC-proprietary format, the recordings must have been exported in the format *neo* Conversation, too.



For information about the export in WAVE format refer to the administration manual for tenants *Export of recordings*.



For information about the import in WAVE format refer to the administration manual for system providers *Import of recordings*.



For information about the import formats ASC legacy storage, ASC legacy integration, and ASC legacy archive medium refer to the administration manual *Migration* (for system providers and tenants).

The recordings have to be exported from the source system by the **tenant** to whom they belong, see [chapter "Export recordings from the source system", p. 9](#).

Subsequently, the **system provider** of the destination system has to import the exported data into the destination system, see [chapter "Import recordings into the destination system", p. 24](#).

In the destination system, the recordings are imported into the system storage and the corresponding meta data into the database. After the import, exclusively the tenant configured in the import configuration has access to the recordings in the destination system.



Data can either be transmitted via a [NAS](#) drive or via an internal or external hard disk.



Chat recordings cannot be imported.

Conversations which exclusively consist of meta data cannot be imported either.



Data which has been encrypted with one of the following methods cannot be imported:

- *neo* key management
 - vormetric key management
-

3

Preconditions

- Software version of the source system: version *neo* 4.2.0 or higher
- Software version of the destination system: version *neo* 4.2.0 or higher
- On both systems, the same major and minor versions must be installed.
- The following license must be available in both systems: Interface for data import and export
- The function *Export* must have been activated in the source system.
- The function *Import* must have been activated in the destination system.



For information about the activation and administration of licenses refer to the administration manual for system providers *License administration*.



For information about the configuration of servers and recording architectures refer to the administration manual for system providers *Configuration servers and recording architectures*.



The import function works only on servers on which a Recording Control service is running.

An import does not take place when switching to a server without a Recording Control service in case of an error.

An import does not take place when switching to a server with a Recording Control service but without a configured import function in case of an error.

- As source drive and target drive, the drive types **NAS** as well as external and internal hard disks can be used.
- In the source system, the drive must be assigned to the tenant who carries out the export.
- In the destination system, the drive must not have been assigned to any tenant so that it can be available for the system provider.
- A separate drive has to be used for each tenant and each export/import.
If export and import are supposed to run in parallel, then the tenant as well as the system provider must have access to the drive.



For information about the supported types of drives refer to the administration manual for system providers *Configuration drives*.



For information about the Drives module refer to the administration manual for system providers *Configuration drives*.



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

4 Supported format for export and import

The neo system provides the format neo Conversation for the export and import between neo recording systems. When using this format, you do not risk losing any information.

Data which is exported with the format neo Conversation is exported with the ASC proprietary format and contains all meta data.

Data which is imported with the format neo Conversation is imported with the ASC proprietary format and can be mapped accordingly in the new system by means of the meta data.

You can import recording data which has been created by another neo recording system, e. g. when merging 2 neo recording systems.



For a permanent transfer, you have to use the option of a data transfer which can be configured in the application System Configuration in the Servers module.



For information about the configuration of servers and recording architectures refer to the administration manual for system providers *Configuration servers and recording architectures*.

Export recordings from the source system

Precondition for the export

- On the server that the recordings are supposed to be exported from, the function *Export* must have been activated, see administration manual *Configuration servers and recording architectures*.



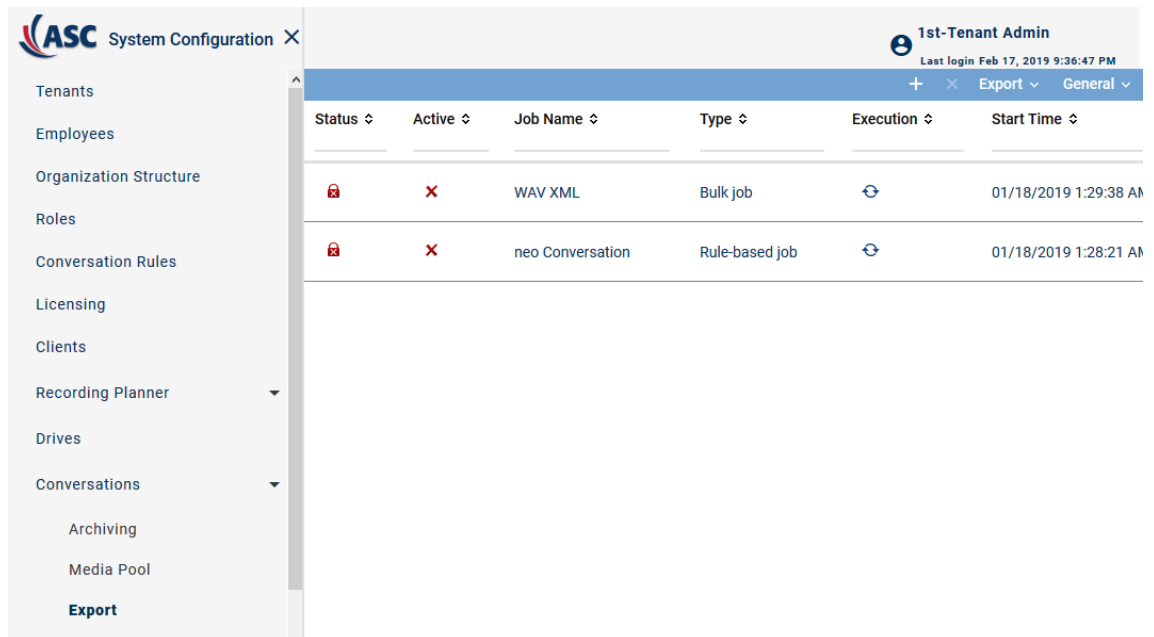
Basic information about using the application System Configuration can be found in the user manual for administrators *System Configuration - General information*.

To export the recordings from the source system, the tenant has to create and activate an export configuration in the Export module of the application System Configuration.




The tenant to whom the recordings belong has to export the recordings from the source system.

- Open the applicationSystem Configuration in the source system.
- Log in as tenant.
- Select the menu item *Conversations > Export* in the navigation bar.



Status	Active	Job Name	Type	Execution	Start Time
	X	WAV XML	Bulk job		01/18/2019 1:29:38 AM
	X	neo Conversation	Rule-based job		01/18/2019 1:28:21 AM

Fig. 1: Main view Export (example)

- Click on the icon  (*Create*) in the toolbar of the main view.
- Adjust the required settings in the tabs of the detail view. You can change tabs without buffering. The settings are not lost.
 - Details*, see Tab Details
 - Schedule*, see [chapter "Tab Schedule"](#), p. 11
 - Criteria*, see [chapter "Tab Criteria"](#), p. 14
 - Drives*, see Tab Drives
- To save the settings, click on the button *Save* in the detail view.
- When you are sure that all settings are correct, open the tab *Details* again and set the *status* of the export configuration to *Released* to activate the export job.
- To save the setting, click on the button *Save* in the detail view.

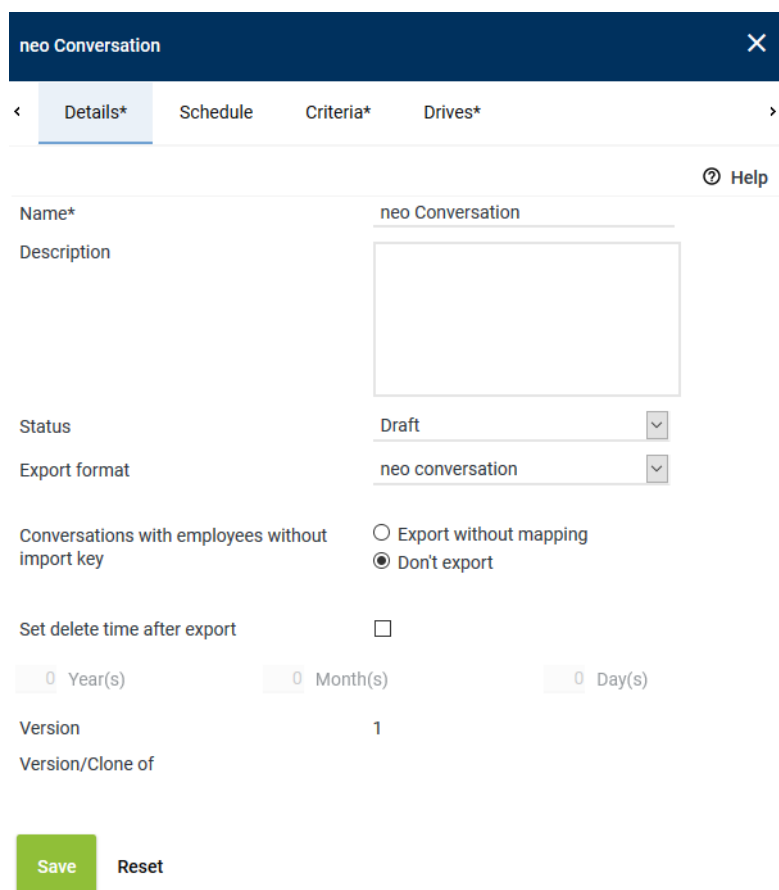
- ⇒ The export job is automatically started at the point in time defined in the schedule.
All recordings which meet the defined criteria are exported to the defined drive in a proprietary format

5.1

Tab Details

- 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:



The screenshot shows a configuration window titled 'neo Conversation' with a close button (X) in the top right corner. Below the title bar is a tabbed interface with four tabs: 'Details*' (selected), 'Schedule', 'Criteria*', and 'Drives*'. A 'Help' icon is located to the right of the tabs. The 'Details' tab contains the following fields:

- Name***: A text input field containing 'neo Conversation'.
- Description**: A large text area for entering a description.
- Status**: A dropdown menu currently set to 'Draft'.
- Export format**: A dropdown menu currently set to 'neo conversation'.
- Conversations with employees without import key**: Two radio button options: 'Export without mapping' (unselected) and 'Don't export' (selected).
- Set delete time after export**: A checkbox that is currently unchecked.
- Time fields**: Three input fields for 'Year(s)', 'Month(s)', and 'Day(s)', each with a '0' value.
- Version**: A text input field containing '1'.
- Version/Clone of**: A text input field that is currently empty.

At the bottom of the form are two buttons: a green 'Save' button and a 'Reset' button.

Fig. 2: 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)

	<p>Select this status to deactivate the job configuration and thus the job.</p> <p>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.</p>
<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 Supported export formats.</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.

5.2

Tab Schedule

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

<
Details*
Schedule
Criteria
Drives*
>

Execution

☒ Interval
☐ Series

Period of Time

Interval

Series

Fig. 3: Export module - 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"> • Interval
------------------	--

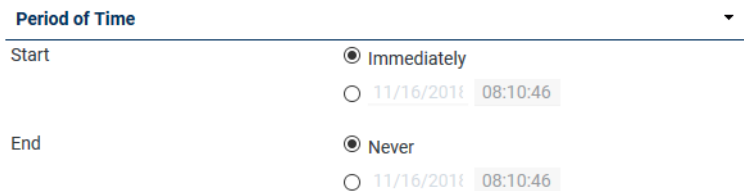
The job is repeated in specified intervals. The interval is defined in the group field *Interval*.

- *Series*

The job is executed on certain serial dates. These dates are defined in the group field *Series*.

5.2.1 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

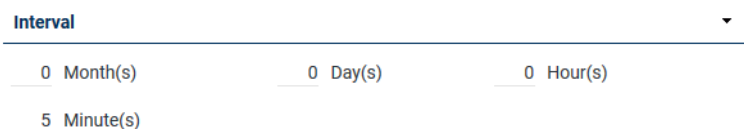
Fig. 4: Schedule - Period of Time

Start	<ul style="list-style-type: none"> • <i>Immediately</i> The job is started immediately. • <i>Entered date</i> 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"> • <i>Never</i> The job never ends. • <i>Entered date</i> 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 .

5.2.2 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. 5: 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 $x \frac{1}{2}$ 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.

5.2.3

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.

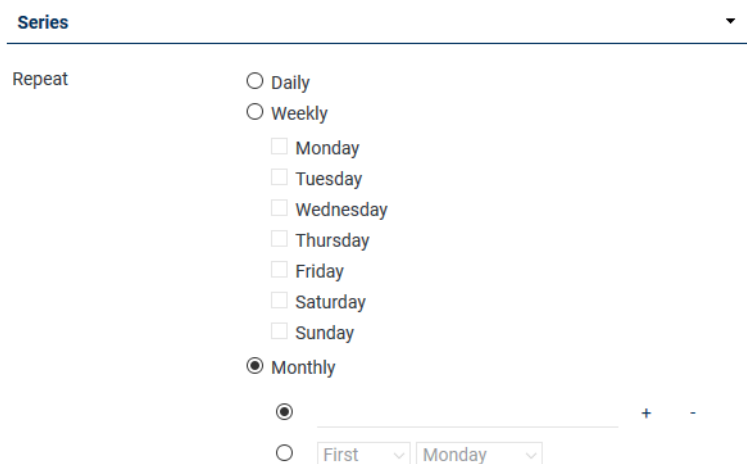


Fig. 6: Schedule - Series

Repeat	Days on which the job is supposed to be executed.
	<i>Daily</i> = The job is repeated daily at the entered time.
	<i>Weekly</i> = The job is repeated on the selected days at the entered time. You can select one or several weekdays.
	<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. 14 and chapter "Configure monthly repetition on fixed days" , p. 13.

5.2.3.1

Configure monthly repetition on fixed days

1. Select the lower option:

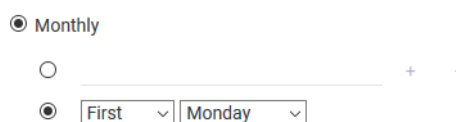


Fig. 7: Configure fixed days

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

5.2.3.2 Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly
☐ + -
☐ First Monday

Fig. 8: 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. 9: 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.

5.3 Tab Criteria

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

<	Details*	Schedule	Criteria	Drives*
Type	<input type="radio"/> Bulk job <input checked="" type="radio"/> Rule-based job			
Behavior if no audio exists	<input type="radio"/> Export only XML file <input checked="" type="radio"/> Skip conversation			
Consider Recordings	▶			
Agents	▶			
Conversation Direction	▶			
Duration	▶			
Calling Party Phone Number	▶			
Called Party Phone Number	▶			
PBX	▶			
Additional Data	▶			
Save	Reset			

Fig. 10: Export module - tab Criteria



For jobs of the type *Bulk* you can only define criteria in the group fields *Conversation Types*, *Dependencies*, *Consider Recordings*, and *Consider Recordings Once*.

All other group fields are only available for rule-based jobs.

General

<i>Type</i>	Define whether the job is supposed to be rule-based or a bulk job. <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> enables the selection of conversations according to rules defined by the user. You can define several criteria in the different group fields for the rule creation.
-------------	--

5.3.1 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. 11: Group field 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.

5.3.2 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. 12: 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.



5.3.3 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.

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



Fig. 13: Criteria - Consider recordings

<i>From</i>	Enter a start date for the period of time in which the conversations that are supposed to be archived 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 that are supposed to be archived 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.

Once 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.

5.3.4 Group field Agents

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

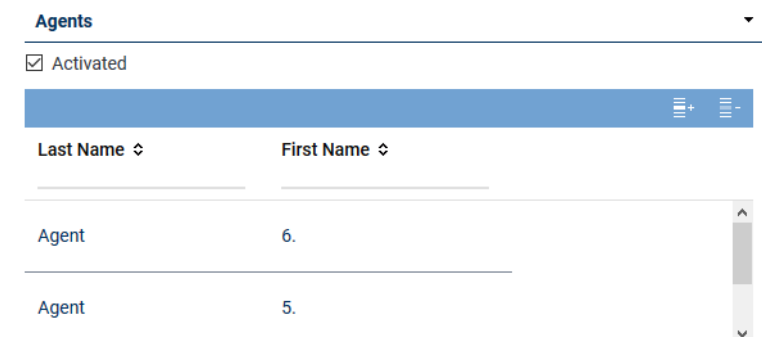





Fig. 14: Criteria - Agents

<i>Activated</i>	<input checked="" type="checkbox"/> = Only conversations of the assigned agents are considered. <input type="checkbox"/> = Conversations of all agents are considered. The list of the selected agents is ignored.
	<i>Add</i> Opens a window in which you can select and add agents (see chapter "Add agent", p. 17).
	<i>Remove</i> Removes the selected agent from the list (see chapter "Delete agent assignment", p. 18).

5.3.4.1 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. 15: Criteria - add agent

- 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. 16: 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*.

5.3.4.2 Delete agent assignment


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

Agents ▼

☒ Activated

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

Fig. 17: 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*).

5.3.5 Group field Conversation Direction

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

Conversation Direction	
Activated	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Inbound <input checked="" type="checkbox"/> Outbound <input checked="" type="checkbox"/> Internal <input checked="" type="checkbox"/> Unknown

Fig. 18: Criteria - Conversation direction

Activated	<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.

5.3.6 Group field Duration

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

Duration	
min. (\geq)	<input checked="" type="checkbox"/> <div> <input type="text" value="0"/> Hour(s) <input type="text" value="45"/> Minute(s) <input type="text" value="0"/> Second(s) </div>
max. (\leq)	<input checked="" type="checkbox"/> <div> <input type="text" value="2"/> Hour(s) <input type="text" value="0"/> Minute(s) <input type="text" value="0"/> Second(s) </div>

Fig. 19: Criteria - Duration

min. (\geq)	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.
max. (\leq)	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.

5.3.7 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. 20: 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 chapter "Edit entry", p. 20 .
Delete	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see chapter "Edit entry", p. 20 .



5.3.7.1 Edit entry

- To adjust an entry in the list, click on the icon  (*Edit*) in the corresponding line.
⇒ The entry is edited in an entry field.

0602150013333	
0602150014444	
<input type="text" value="New value"/>	 

Add **Delete**

Fig. 21: Edit entry in the list




- Adjust the entry.
- To save the changes, click on the icon  (*Save*).
To discard the changes, click on the icon  (*Discard*).

5.3.8 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. 22: 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 chapter "Edit entry", p. 20 .
Delete	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see chapter "Edit entry", p. 20 .

5.3.9 Group field PBX

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

PBX ▼

☐ Activated

PBX

Fig. 23: 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.

5.4 Tab Drives

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

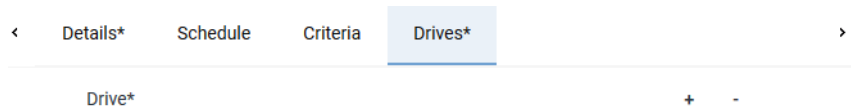




Fig. 24: Tab Drives

	Opens a window in which you can select a drive, see chapter "Assign drive", p. 22 .
	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*.

5.4.1

Assign drive

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

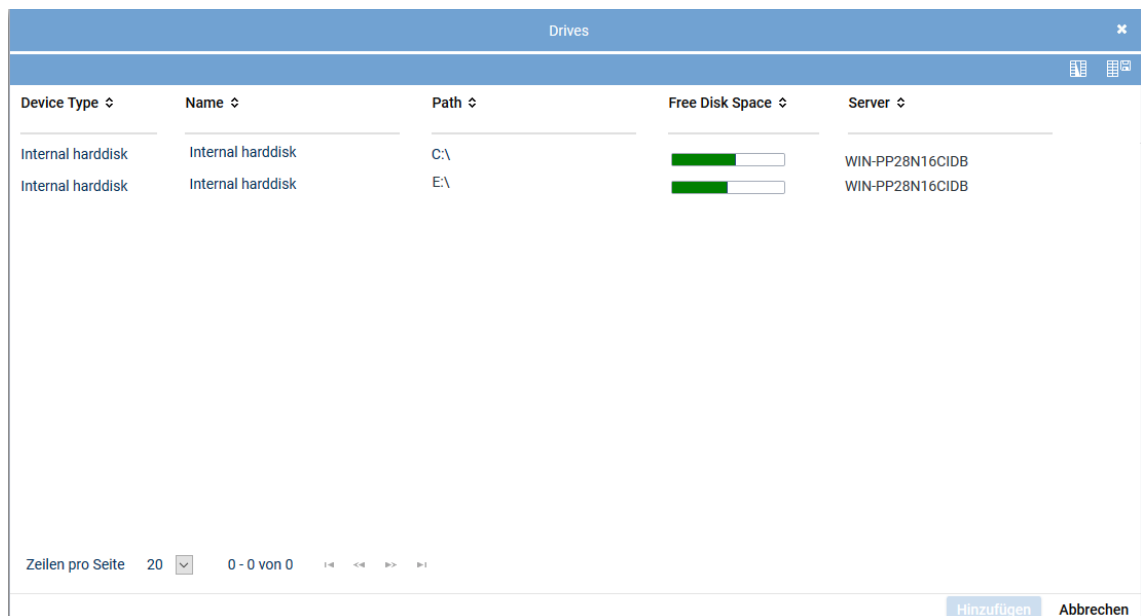


Fig. 25: Add drive

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

5.5

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*.

6

Import recordings into the destination system

Preconditions for the import

1. The recordings to be imported must have been exported from the source system.
2. On the target server, the function *Import* must have been activated, see administration manual *Configuration servers and recording architectures*.
3. The user must have all access rights to the respective drives.



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

To import the recordings in the destination system, you as system provider have to create and activate an import configuration in the Recording Import module of the application System Configuration.



The following configuration has to be carried out as system administrator.

4. On the destination system, open the application System Configuration.
5. Select the menu item *Setup > Recording Import* in the navigation bar.

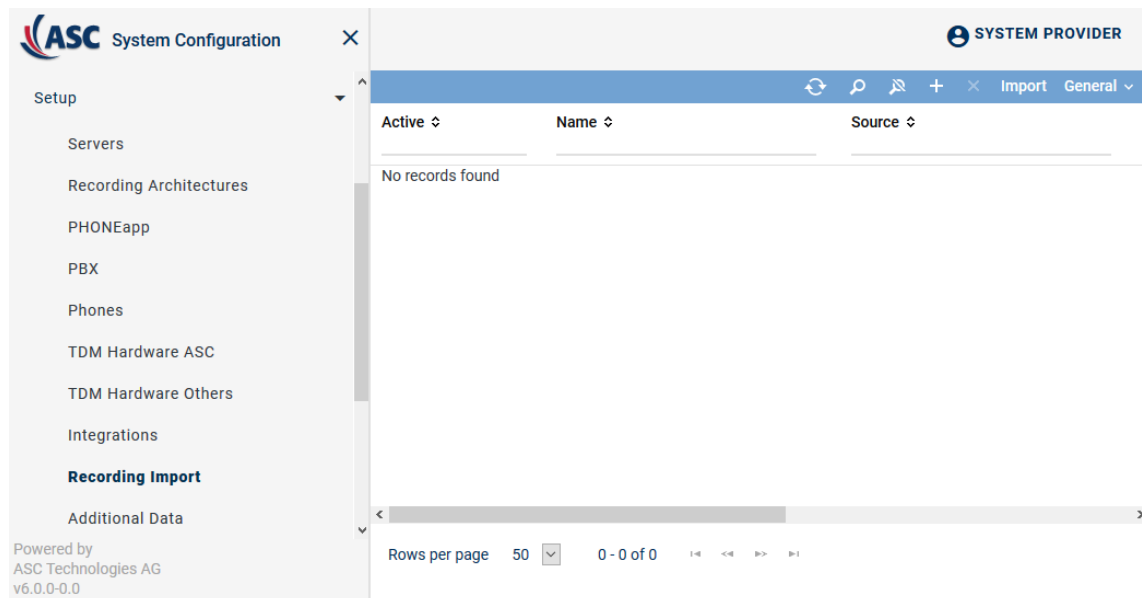


Fig. 26: Main view Import (example)

6. Click on the icon  (*Create*) in the toolbar of the main view.

6.1

Tab Details

1. Select the tab *Details* and configure the import job.

neo Conversation

<

Details*

Drives*

Mapping

Check Duplicate

>

Active

☒

Name*

neo Conversation

Description

Import format*

neo conversation

Codec

G.711 a-law

Execution mode

☐ Once
 ☒ Continuous

PBX*

Universal import

+

-

Tenant*

1st-tenant

+

-

Conversations with employees without import key

☐ Import without mapping
 ☒ Don't import

Retention period of import statistics

1

Year(s)

0





Month(s)

Save


Reset

Fig. 27: Recording Import module - tab Details

Active	<p>Tick the check box to activate the import job.</p> <p><input checked="" type="checkbox"/> = Job is active.</p> <p><input type="checkbox"/> = Job is not active.</p> <p>If you have activated the configuration by ticking the check boxes, start the import directly upon saving it.</p>
Name	Enter the name of the import job.
Description	Here, you can enter a description for import job.
Import format	Select the import format <i>neo</i> Conversation from the drop-down list.
Codec	This setting has been preselected and cannot be changed for this import format.
Execution mode	<p>Select whether the import is supposed to be executed only once or continuously.</p> <ul style="list-style-type: none"> • <i>Once</i> <p>The import is started immediately upon activating the import job. The source directory is only checked once for data.</p> • <i>Continuous</i> <p>Upon activating the import job, the import is started permanently and does not end before the import job is deactivated manually. The source directory is constantly checked for new data as long as the import job is active.</p> <p>NOTICE! For some import formats, only an unambiguous execution mode is available. In this case, this setting appears as default here.</p>

<i>PBX</i>	<p>Select the PBX for which the data is supposed to be imported.</p> <p> Opens a window in which you can select a PBX, see chapter "Assign PBX", p. 26.</p> <p> Deletes the entry from the entry field.</p> <p>It is necessary to map the imported data to a PBX so that the extensions via which the imported conversations have been made can be mapped to a PBX, too, and that the system can check whether an extension or an external phone number is concerned. If an extension has been mapped to an agent, this allows a mapping to an agent.</p>
<i>Tenant</i>	<p>Select which tenant the imported recordings are supposed to be mapped to.</p> <p> Opens a window in which you can select a tenant, see chapter "Assign tenant", p. 27.</p> <p> Deletes the entry from the entry field.</p> <p>NOTICE! In a 1-tenant system, the tenant is entered here automatically. The setting cannot be changed.</p>
<i>Conversations with employees without import key</i>	<p>Select how the import job is supposed to handle the conversations with employees without import key.</p> <ul style="list-style-type: none"> • <i>Import without mapping</i> <p>Conversations with employees who do not have an import key in the destination system are imported without being mapped to an employee.</p> • <i>Don't import</i> <p>Conversations with employees who do not have an import key in the destination system are not imported but stored in the following directory:</p> <p><code><Import-source-directory>\RCInfo\failed</code></p> <p>If you find data in this directory after an import, please contact your local ASC support or call ASC support at +49 700 27278776.</p> <p>NOTICE! Conversations which have been exported from the source system without having been mapped to an employee will be imported without a mapping, regardless of the option which is selected here.</p> <p>NOTICE! The tenant can map an import key to its employees manually in the Employees module. When importing employees from an LDAP source, import keys are created automatically.</p>

6.1.1 Assign PBX

1. Click on the button  on the right of the entry field.
2. Select a **PBX** from the list.



Name	Type
SIP	Universal VoIP
Cisco ...	Cisco UCM
Avaya_1	Avaya CM
Cisco Jabber	Cisco Jabber
Universal import	Universal import
Universal analog CM	Universal analog CM
OpenScape Xpert	OpenScape Xpert

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Add Cancel

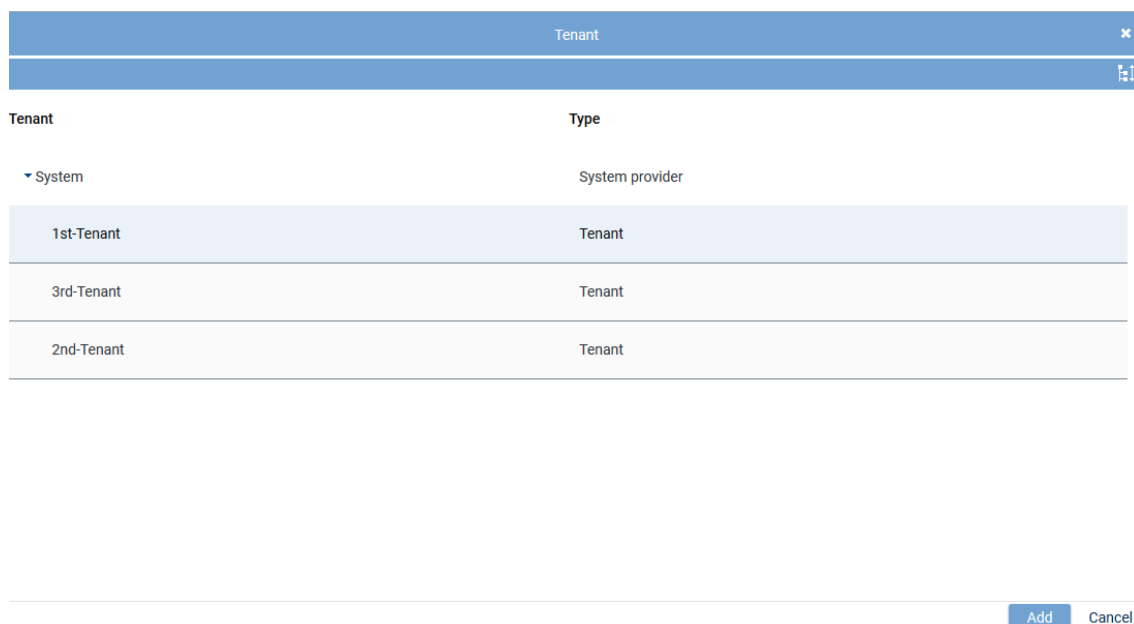
Fig. 28: Add PBX

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

6.1.2

Assign tenant

- Click on the button **+** on the right of the entry field.
- Select a tenant from the list.



Tenant	Type
System	System provider
1st-Tenant	Tenant
3rd-Tenant	Tenant
2nd-Tenant	Tenant

Add Cancel

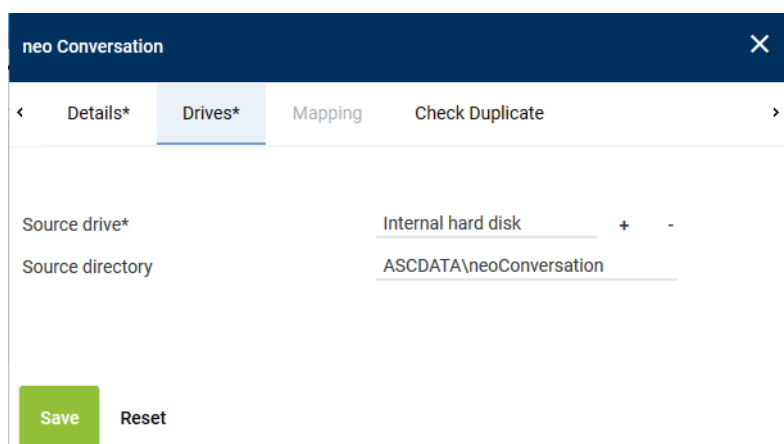
Fig. 29: Add tenant

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

6.2

Tab Drives

- Select the tab *Drives* to configure the drive from which the data is supposed to be imported.



The screenshot shows a web interface titled "neo Conversation" with a close button (X). Below the title is a navigation bar with four tabs: "Details*", "Drives*", "Mapping", and "Check Duplicate". The "Drives*" tab is currently selected. The main area contains two input fields: "Source drive*" with the value "Internal hard disk" and a dropdown arrow, and "Source directory" with the value "ASCDATA\neoConversation". At the bottom left, there are two buttons: a green "Save" button and a "Reset" button.

Fig. 30: Recording Import module - tab Drives

Source drive	Select the drive from which the data is supposed to be imported, see chapter "Assign drive", p. 22 .
Source directory	Enter the directory from which the data is supposed to be imported.

2. To save the settings, click on the button *Save* in the detail view.
3. When you are sure that all settings are correct, open the tab *Details* again and activate the import job by ticking the check box *Active*.
4. To save the setting, click on the button *Save* in the detail view.
 - ⇒ Once the import job has been activated, the data is imported from the indicated directory.
 - ⇒ Audio data is imported into the call pool of the destination system. Subsequently, they are visible in the replay applications of the destination system and can be searched, replayed, and archived if required.
 - ⇒ Meta data is imported into the database of the destination system.

6.3 Tab Mapping

No mapping is required when importing recordings in the format *neo* Conversation. The recordings already contain additional data; for this reason, this tab is not active when using the import format *neo* Conversation for the import.

6.4 Tab Check Duplicate

When importing with the import format *neo* Conversation, you have the option to delete duplicates.

1. Select the tab *Check Duplicate* to configure the rules for checking for duplicates.

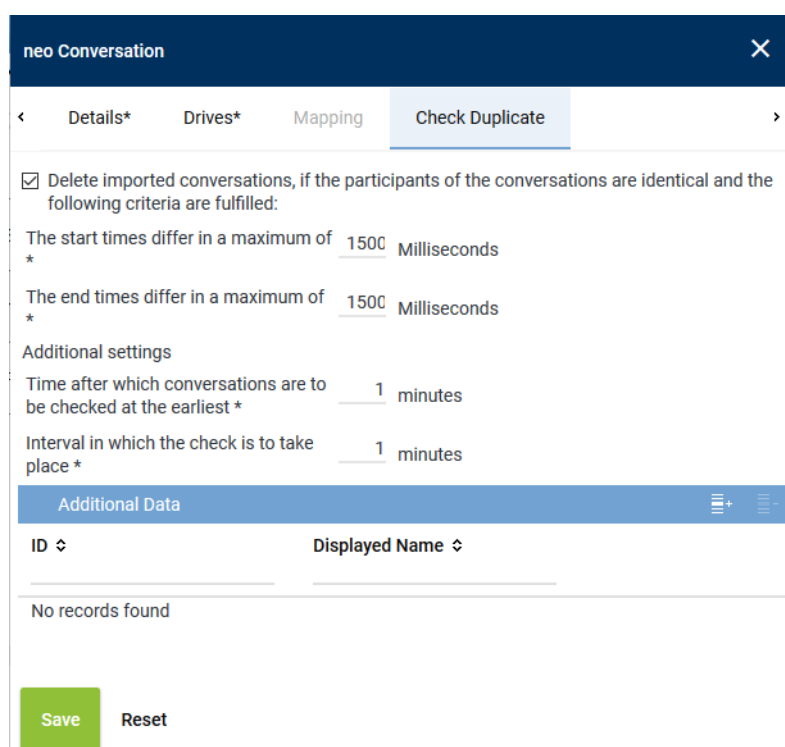


Fig. 31: Recording Import module - tab Check Duplicate

2. Activate the check box
 - ☒ *Delete imported conversations, if the participants of the conversations are identical and the following criteria are fulfilled:*
 - ⇒ The configuration becomes active and the criteria can be configured.

<i>The start times differ in a maximum of</i>	Enter the difference of the start times in milliseconds, e. g. 1500.
<i>The end times differ in a maximum of</i>	Enter the difference of the end times in milliseconds, e. g. 1500.
Additional settings	
<i>Time after which conversations are to be checked at the earliest</i>	Enter the time that is supposed to pass after the import, before the conversations are checked for the criteria, e. g. 1 minute.
<i>Interval in which the check is to take place</i>	Enter the interval in which the check is to take place, e. g. 1 minute.

6.4.1 Map additional data

In addition to the start time and the end time, you can configure more additional data which is supposed to be used for checking for duplicates.

1. In the list *Additional data*, click on the icon  (Add) to configure more additional data.

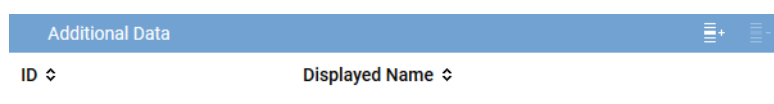


Fig. 32: Map additional data

2. Select the respective additional data from the list which are supposed to be used additionally to check for duplicates.
To select several entries or revoke a selection, click on the respective line while holding the [Ctrl] key down.

Additional Data ×			
Displayed Name ⇅	Available ⇅	Editable ⇅	External Recording Control ⇅
Kommentar	✓	✓	✗
Universal Call ID	✓	✓	✗
<div> Rows per page 20 ▼ 1 - 2 of 2 ◀ << >> ▶ </div>			
			Add Cancel

Fig. 33: Select additional data

NOTICE! The list contains only additional data which have been configured in the Additional Data module previously.



For information about the configuration of additional data refer to the administration manual for system providers *Additional Data module*

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

6.5

Start and stop import

- To start the import job, change to the tab *Details*.

×

<
Details*
Drives*
Mapping
Check Duplicate
>

ⓘ Help

Active
☐

Fig. 34: Activate import job

Active

Tick the check box to activate the import job.

☒ = Job is active.
☐ = Job is not active.


As long as an import job is active, the recording system checks whether new files are available in the source directory. If new data is available, it is imported directly.

- Click on the button *Save*. This automatically starts the import.
- To cancel the import job, you have to deactivate the option and save the settings again.

6.6

Check results

You can check the result of an import job in the application *System Monitoring* in the Jobs module.

1. Log in to the application *System Monitoring* as system administrator.
2. Select the menu item *Jobs* in the navigation bar.
3. In the list of messages, search for the entry of the respective import.
4. Information about the configured job appears in the tab *Details*.
5. The tab *Executions* displays the entries of the latest executions.
6. Click on the icon  (*History*) in the headline.
⇒ A window opens displaying the information whether the execution was successful.



For information about the Jobs module refer to the user manual for administrators *Usage System Monitoring*.

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Glossary

LDAP

Lightweight Directory Access Protocol

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