

System Configuration Migration



Administration manual for system providers and tenants

8/4/2020

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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1 General information

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2 Introduction

This document describes the preconditions and the procedure of a migration of data from ASC recording systems version 10 to ASC recording systems of version neo 4.0 and higher.

During the course of a migration, the following data can be transferred from version 10 to version neo 4.0 and higher:

- User data
See [chapter "Migration of user data", p. 16.](#)
- Recorded conversations
See [chapter "Migration of recordings", p. 24.](#)



Screen recordings cannot be migrated.
INSPIRATIONpro sessions cannot be migrated.



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

- neo key management
- vormetric key management

3 Migration requirements

- Software version of the V10 system, one of the following versions:
 - EVO*ip* Windows: version 10.00.38 SP5 or higher
 - EVO*ip* Linux: version 10.00.24 SP or higher
 - Product line MARATHON EVOLUTION: version 10.00.24 SP or higher
 - INTERACTION Software Linux: version 10.00.24 SP or higher
 - INTERACTION Software Windows: version 10.00.22 SP5 or higher
- Software version of the destination system: version neo 5.5.0 or higher
- The following license is available in the destination system: Interface for data import and export



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



The software of the neo Suite exclusively supports the operating system Windows.

To use recorders of the product line MARATHON EVOLUTION with software of version neo, it is imperative that you run a Windows operating system on these recorders. To this end, ASC provides you with a Windows image.


4 Preparatory configuration on neo server

4.1 Create recording profiles

Recording profiles cannot be transferred but have to be created again on the *neo* server. To guarantee that no data is lost when importing the V10 recordings, it is advisable to configure a bulk profile for the import.



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

1. Log in to the application as 1st tenant-admin. *System Configuration* as 1st tenant-admin.
2. Select the menu item *Recording Planner > Compliance*.
3. In the main view, click on the icon  (*Create/Duplicate profile*) to create a new profile.

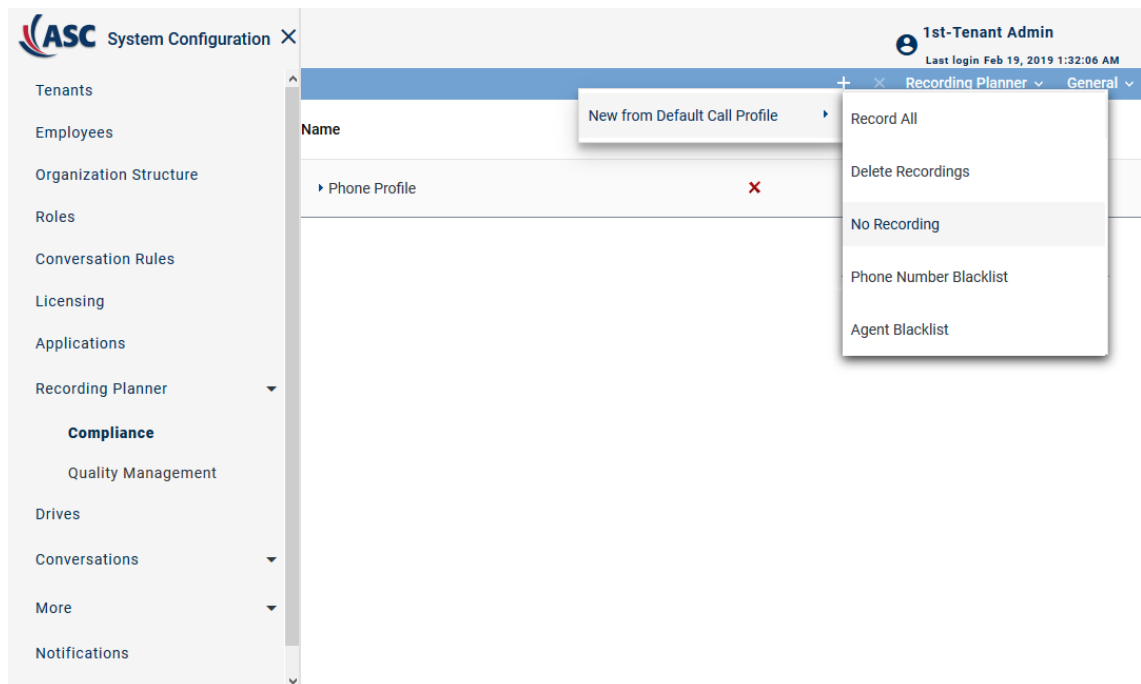


Fig. 1: Create new profile for the import

4. Select the option *New from Default Call Profile > Record All*.

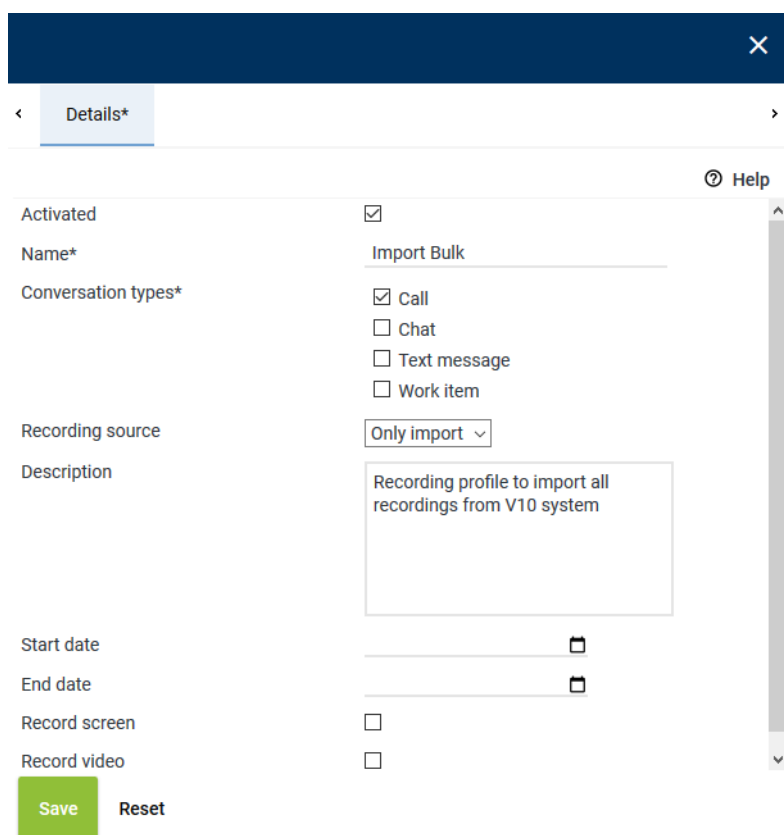


Fig. 2: Configure parameters for the import profile

5. Enter the following parameters:

| | |
|---------------------------|---|
| <i>Activated</i> | Activate the check box so that the recordings can be imported upon starting the import job. |
| <i>Conversation types</i> | Select the option <i>Calls</i> as other recordings from the V10 server cannot be imported. |
| <i>Recording source</i> | Select the entry <i>Only Import</i> from the drop-down list. |

6. Click on the button **Save** to save the settings and activate the profile.

Other parameters do not have to be configured for the import.



For information about the Recording Planner module refer to the administration manual for tenants *Recording Planner*.

4.2

Map additional data

Clarify before carrying out a migration of recordings which additional data and ASCII fields from the V10 server are supposed to be imported to the neo server.

The following additional data are applied automatically during a migration:

- *Own phone number, phone numbers of partners and of other subscribers* - are saved as the respective participant depending on the call direction
- *PBX Agent ID* - is mapped to the participant in its respective position, e. g. *PBX Agent ID of the calling party*.
- *Call direction* - is applied 1:1
- *Start and end times* - are applied 1:1

Example:

| V 10 | | <u>neo</u> | |
|----------------------|----------------|---|----------------|
| Own phone number | 234 | Calling party | 234 |
| PBX Agent ID | 1234 | Calling party PBX Agent ID and/or Called party PBX Agent ID | 1234 |
| Partner phone number | +4960215001123 | Called party | +4960215001123 |
| Call direction | Outbound | Call direction | Outbound |

The following additional data can be imported additionally to the neo server if its mapping has been configured on the neo server:

- ASCII1-20
- LONG1-10
- CALL_ID
- SECOND_CALL_ID
- COMMENT
- DTMF_SEQUENCE
- PBX_CALL_ID
- AGENT_ID
- PHONELINE_ID
- RECORDERLINE_ID
- LOGGER_ID

NOTICE! When mapping the LOGGER_ID, the new ID of the neo recording server is used instead of the ID of the V10 system from which data was exported

For archive media, the following additional data can be imported:

- AGENT_NAME
- AGENT_FUNCTION
- PHONELINE_NAME

Additional data is converted into the new format by the destination system during the import and stored in the database, see [chapter "Map additional data", p. 31](#).



The additional data from the V10 server can exclusively be imported to CustomCP fields on the neo server which have previously been configured in the Additional Data module.



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

4.3 Create recording architecture

To be able to map the recordings to be imported on the *neo* server, at least one recording architecture must have been configured and activated.

You can configure the following recording architectures to be used for the import:

- For import purposes, you can configure a recording architecture with the deployed PBX that you plan to use for recording later on.
- For import purposes, you can configure the dedicated recording architecture *Import Only* that is deactivated after the import.
- You can configure two recording architectures; one for the import which is deactivated after the import and another one that you plan to use for recording later on.



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

The following description refers to a configuration for the import only.

1. Log in to the application *System Configuration* as system admin.
2. Select the menu item *Setup > Recording Architectures* in the navigation bar.
 - ⇒ The following window appears:

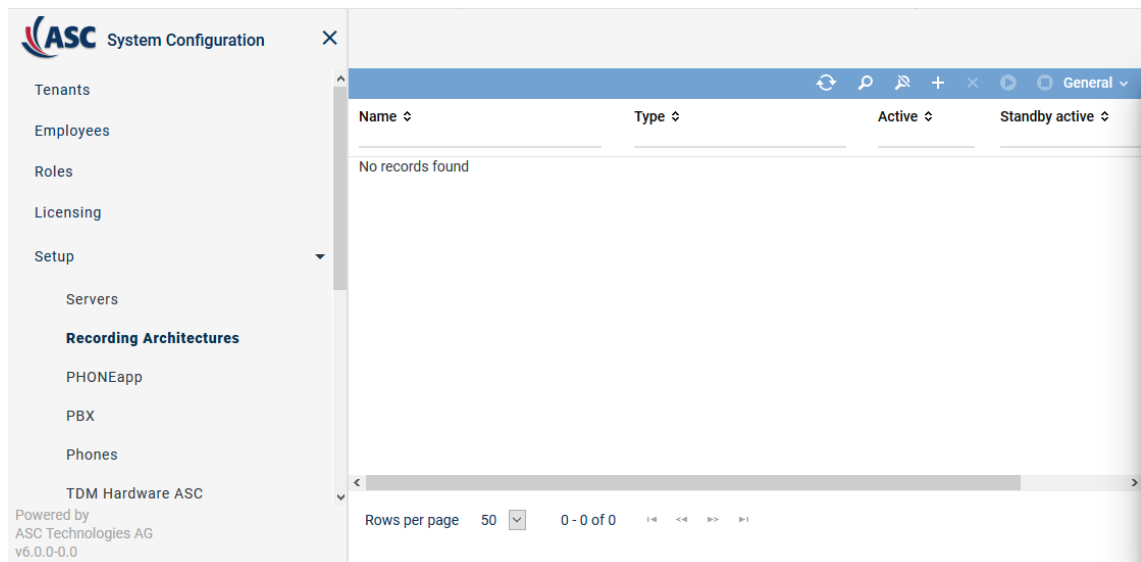



Fig. 3: Recording architectures - main view

3. To create a new recording architecture, click on the icon  (*Create*) in the toolbar of the main view.
 - ⇒ The window *New Recording Architecture* appears.

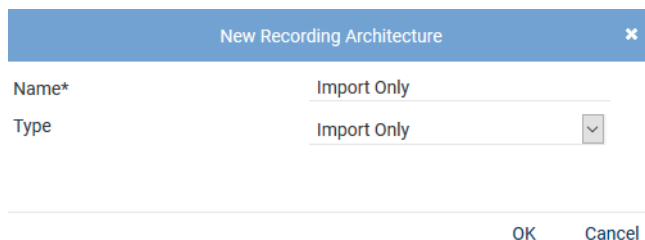
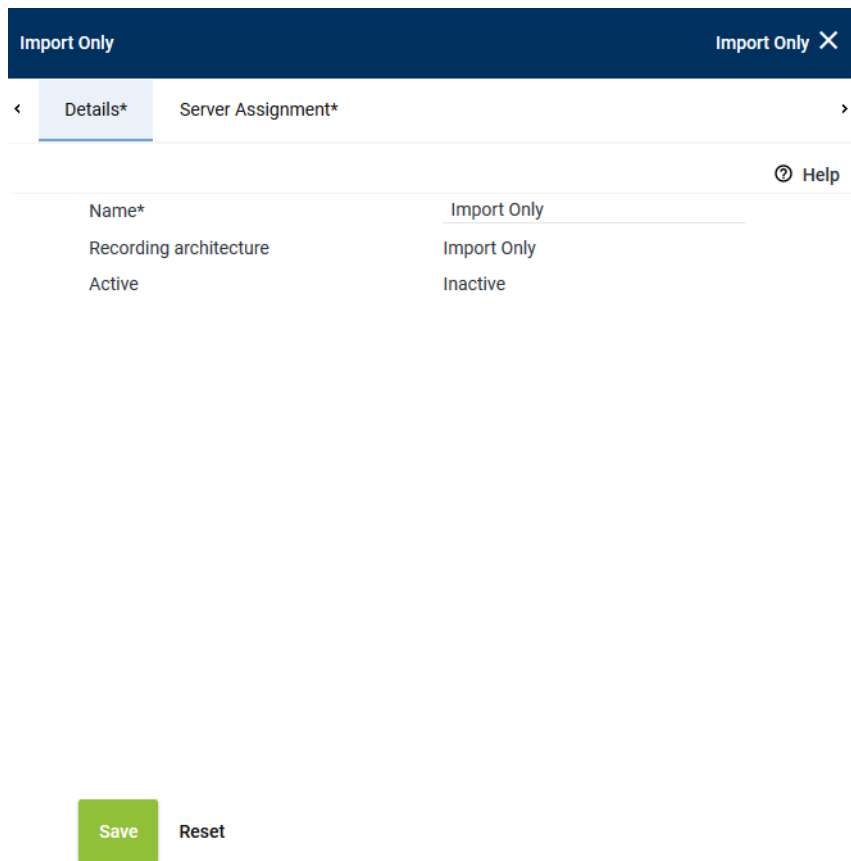


Fig. 4: Create recording architecture *Import Only*

4. In the entry field *Name*, enter a descriptive name for the recording architecture.
5. Select the recording architecture type *Import Only* from the drop-down list *Type*.

NOTICE! The drop-down list only displays the supported recording architecture types.
6. Click on the button *OK*.

⇒ Your entries now appear in the detail view.



| Name* | Import Only |
|------------------------|-------------|
| Recording architecture | Import Only |
| Active | Inactive |

Fig. 5: Recording architecture - tab Details

- Click on the tab *Server Assignment* to assign a recording server to the recording architecture.

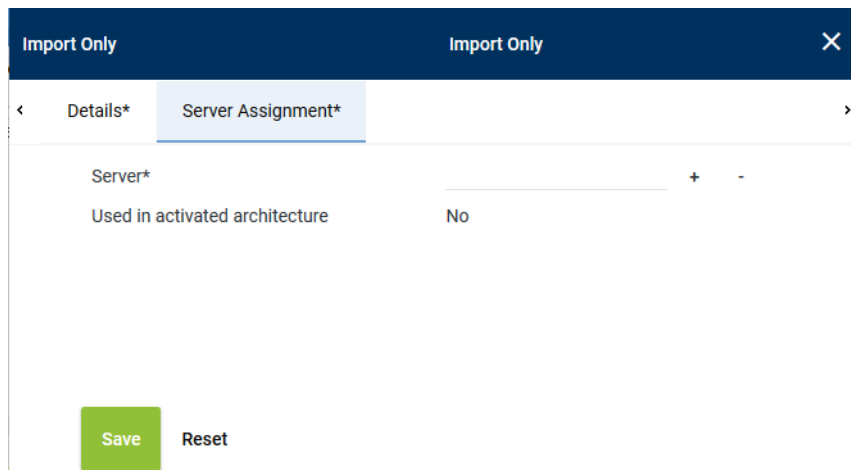


Fig. 6: Recording Architecture - tab Server Assignment

- Click on the button **+** behind the entry field *Server*.
⇒ The window *Servers* appears.

| Servers | | |
|---------|-----------------|--------|
| Name ↕ | IP Address ↕ | Path ↕ |
| REC-01 | 192.168.173.171 | C:\ |

Rows per page 20 1 - 8 of 8




Add Cancel

Fig. 7: Recording Architecture - assign server

9. Select the entry of the corresponding server.
10. Click on the button *Add*.
 - ⇒ The name of the server now appears in the detail view.


| Import Only | | Import Only | |
|--|--------|-------------|---|
| <div> <div>Details*</div> <div>Server Assignment*</div> </div> | | | |
| Server* | REC-01 | + | - |
| Used in activated architecture | No | | |
| <div> <div>Save</div> <div>Reset</div> </div> | | | |

Fig. 8: Recording Architecture - assign server

11. Click on the button *Save*.
12. Mark the recording architecture in the main view, so that the icon  (*Activate*) becomes active in the toolbar.
13. To activate the recording architecture, click on the icon  (*Activate*).
 - ⇒ In the column *Active*, the icon  (*Active*) appears.

| Name ↕ | Type ↕ | Active ↕ | Standby active ↕ |
|-------------|-------------|----------|------------------|
| Import only | Import Only | ✓ | ✗ |

Fig. 9: Recording Architecture - activate recording architecture

14. To deactivate the recording architecture if required, e. g. to add or remove integration types, click on the icon  (*Deactivate*).

4.4 Create PBX

To be able to map the recordings to be imported on the *neo* server, you have to configure a *PBX*. If the same PBX type is used, you can configure the PBX that you would like to use for recording. If you do not want to make recordings on this server, you can use the PBX type *Universal Import* for the import only.




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

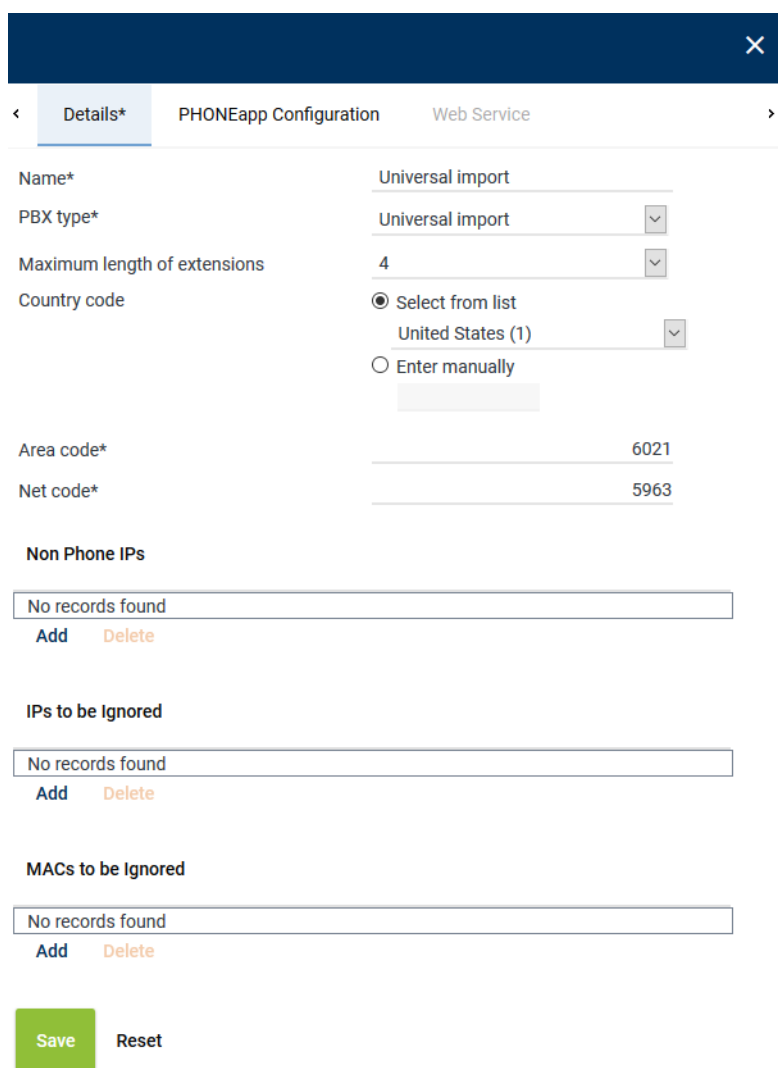
The following description refers to a configuration for the import only.

1. Log in to the application System Configuration as system administrator.
2. Select the menu item *Setup > PBX* in the navigation bar.
 - ⇒ The following window appears:



Fig. 10: Create new PBX

3. Click on the icon  (*Create*) in the toolbar of the main view.
 - ⇒ In the detail view, the tab *Details* appears.



Details* PHONEapp Configuration Web Service

Name* Universal import

PBX type* Universal import

Maximum length of extensions 4

Country code

☒ Select from list

United States (1)

☐ Enter manually

Area code* 6021

Net code* 5963

Non Phone IPs

No records found

Add Delete

IPs to be Ignored

No records found

Add Delete

MACs to be Ignored

No records found

Add Delete

Save Reset

Fig. 11: Create new PBX - tab Details

4. Set the following parameters in the detail view:

| Parameter | Value/Description |
|----------------------------------|---|
| Name | This <i>name</i> serves as the identifier of this PBX. |
| PBX type | Select the type of the PBX from the drop-down list. |
| Maximum length of the extensions | Enter the number of digits of the extensions, e. g. 4. |
| Country code | Select the option for the country code: <ul style="list-style-type: none"> <i>Select from list</i> Select the country code from the drop-down list. <i>Enter manually</i> If the corresponding country code is not available in the drop-down list, you can enter the 3-digit code manually. e. g. for Sri Lanka 094. |
| Area code | Enter the area code without the preceding 0, e. g. 6021. |
| Net code | Enter the net code, e. g. 5963. Do not enter an extension here. |

Tab. 1: Create PBX

5. To save the settings, click on the button **Save**.
To discard the settings, click on the button **Reset**.

5 Migration of user data

5.1 Import or create user



To be able to map the recordings to be imported to the corresponding user, you have to either import the users from the V10 server or create them again before starting a migration.



For information about the configuration refer to the administration manual for tenants *User management tenant*.

To export the user configuration from the V10 system, see [chapter "Export of user data from a V10 server"](#), p. 16.

To import the user configuration to the *neo* server, see [chapter "Import of user data to the neo server"](#), p. 17.

5.2 Export of user data from a V10 server

1. Open the application ASC DataManager.
2. Select the menu item *User Management > Users*.

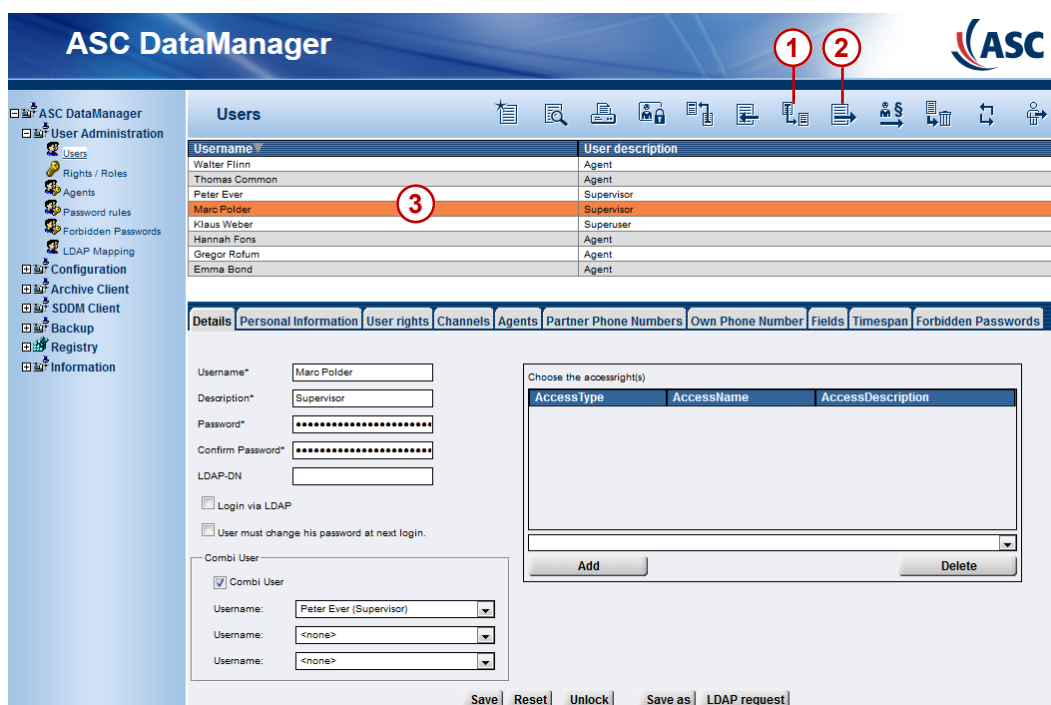






Fig. 12: User management

| | | |
|---|---|--|
| 1 |  | Exports the data of all users. |
| 2 |  | Exports exclusively those data which has been selected in the user list. |
| 3 | User list | Overview of all users of the recording system. |

3. If you would like to export the data of all users, click on the icon  (*Export all*).
4. If you would like to export the data of selected users, select these users in the user list and click on the icon  (*Export selected*).
To select several users or revoke a selection, click on the respective line while holding the [Ctrl] key down.

⇒ The data is exported to the local download directory in the file *user.dat*.

5.3 Import of user data to the neo server



The tenant who requires the data is responsible for the import of the configuration data into the destination system.

5.3.1 Preconditions

- On the server that the configuration data is supposed to be imported to, the function *Data storage* must have been activated, see administration manual *Configuration servers and recording architectures*.
- The data to be imported must have been exported from the V10 server, see [chapter "Export of user data from a V10 server", p. 16](#).
- The data to be imported must be available in a directory on the *neo* server.
- An XSLT mapping for the data to be imported must have been configured on the *neo* server.
NOTICE! For the migration, ASC provides several default XSLT files, see [chapter "Default XSLT files", p. 17](#). Use these files to create XSLT mappings for the migration.



XSLT mappings are created in the XSLT Management module, see administration manual *XSLT management*.

5.3.2 Default XSLT files

To map external data to the data structures of the *neo* system, you need [XSLT](#) files.

ASC provides different default [XSLT](#) files some of which you can use directly or otherwise as a template. These [XSLT](#) files can be found in the following directory:

- *C:\Program Files (x86)\ASC\ASC Product Suite\scripts\resources\XSLT*

For the migration, ASC provides the following default XSLT files:

XSLT files for the migration

- *AgentV10ToNeoXSLT.xslt*
Can be used for the import object type: *employees*
Purpose of use: import of agent data from a recording server version 10
- *UserV10ToNeoXSLT.xslt*
Can be used for the import object type: *employees*
Purpose of use: import of employee data from a recording server version 10



When importing employee data, the password is set to *1* and the setting *Password must be changed* is activated.



Upon request, ASC provides you with support in adjusting the [XSLT](#) templates or with additional [XSLT](#) files appropriate for your individual data structures.

5.3.3 Create import configuration

To import the configuration data into the destination system, you have to create and activate respective import configuration in the Configuration Import module of the application System Configuration.

1. Open the application *System Configuration*.
2. Log in as tenant.
3. Select the menu item *More > Configuration Import*.
 - ⇒ The main view of the Configuration Import module appears.

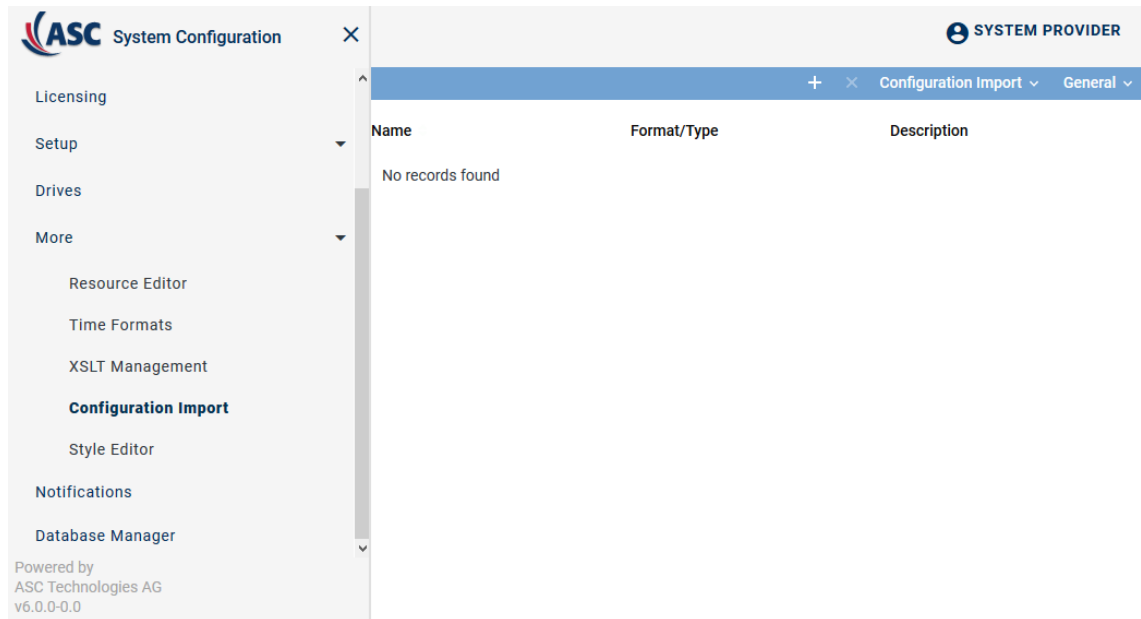

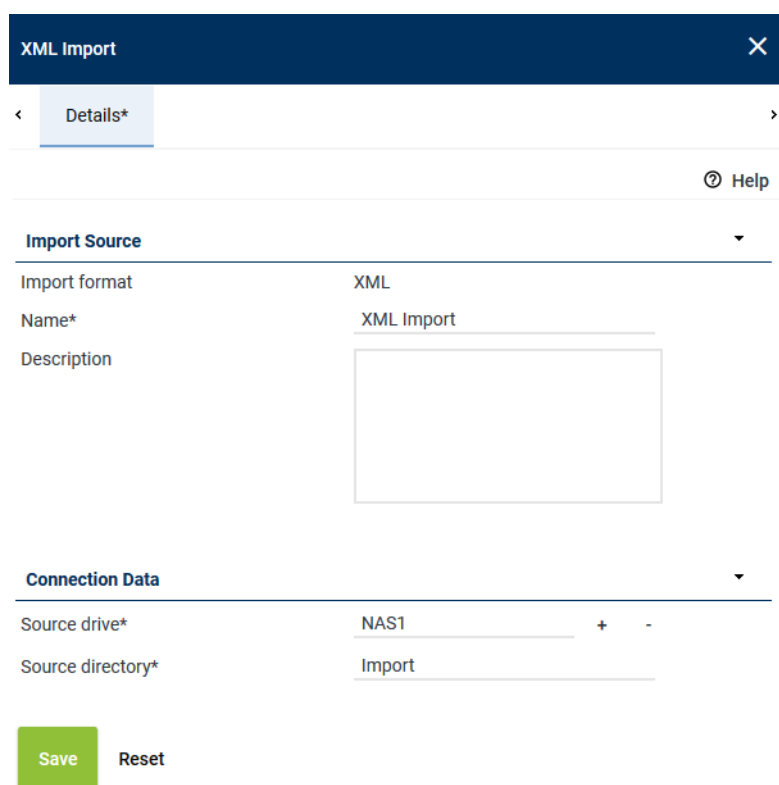


Fig. 13: Configuration import - main view (example)

4. Create a new XML import source.
To do so, click on the icon  (*Create new import source*) in the toolbar of the main view.
5. In the context menu of the icon, select the entry *XML*.
6. Enter all required information in the tab *Details*:

Tab Details - new import source



XML Import [X]

< **Details*** >

Help

Import Source ▼

Import format XML

Name* XML Import

Description

Connection Data ▼

Source drive* NAS1 + -

Source directory* Import

Save Reset

Fig. 14: Configuration Import module - detail view Import Source

Group field Import Source

| | |
|----------------------|---|
| <i>Import format</i> | Shows the selected import format. |
| <i>Name</i> | Enter a name for the new import source. |
| <i>Description</i> | Enter an optional description of the import source. |

Group field Connection Data

| | |
|-------------------------|--|
| <i>Source drive</i> | Select the drive from which the data is supposed to be imported. See chapter "Assign drive", p. 29 . |
| <i>Source directory</i> | Enter the path to the directory from which the data is supposed to be imported. |

1. Click on the button **Save** to save the new import source.
2. Select the recently created import source in the main view.
3. Click on the icon **+** (*Create new import configuration*) in the toolbar of the main view.
4. Adjust all required settings in the tabs *Details*, *Import Options*, and *Schedule* in the detail view.
You can change tabs without buffering. The settings are not lost.

Tab Details - new import configuration

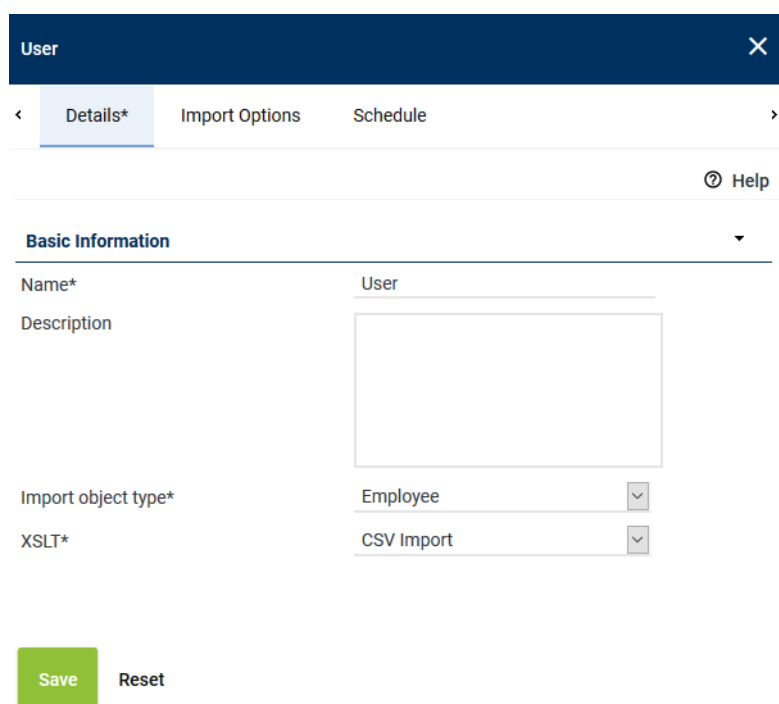


Fig. 15: Configuration Import module - Import configuration tab Details

Group field Basic Information

| | |
|---------------------------|--|
| <i>Name</i> | Enter the name of the import configuration here. |
| <i>Description</i> | Enter an optional description of the import configuration. |
| <i>Import object type</i> | <p>Select which type of configuration data you would like to import (user data, evaluation templates or evaluations).</p> <p>Select the import object type from the drop-down list.</p> |
| <i>XSLT</i> | <p>Select which XSLT mapping is supposed to be used for the import.</p> <p>Select the appropriate XSLT mapping for the import from the drop-down list.</p> <p>NOTICE! The XSLT mapping must previously have been created in the XSLT Management module, see administration manual <i>XSLT management</i>.</p> |

Tab Import Options



Which of the following options are available depends on the *import object type* you have selected in the tab *Details*.

Unify Phones
×

Details*
Import Options
Schedule

Create and Delete Objects

Create object with unknown import key ☒
Delete object from previous imports ☒
Update phones without import key if the names of the phones are the same. ☒

Stop Criteria

Maximum number of allowed errors ☐ 0
Maximum number of allowed delete processes ☐ 0

Save
Reset

Fig. 16: Configuration Import module - Import configuration tab Import Options

Group field Create and Delete Objects

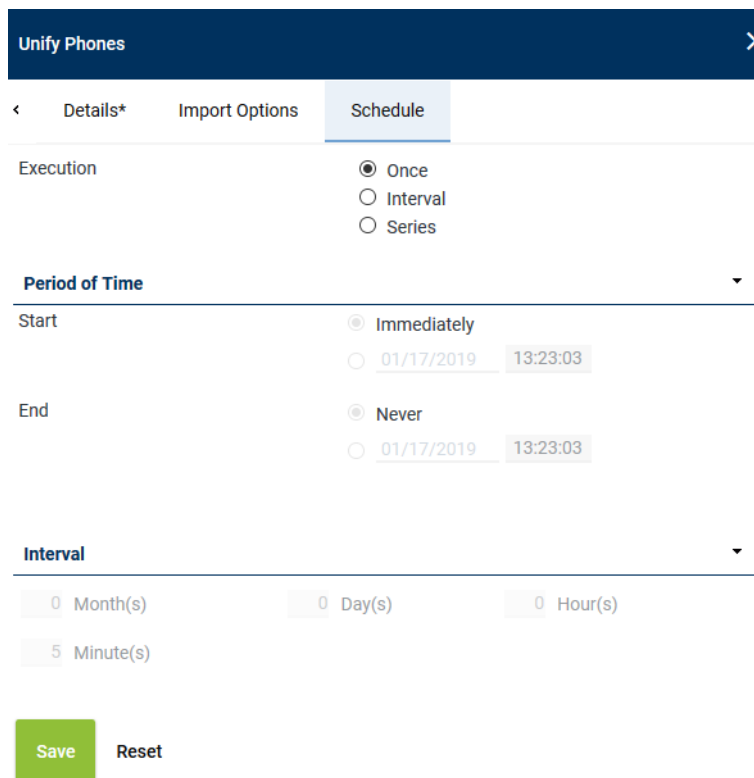
| | |
|--|--|
| <i>Create object with unknown import key</i> | <p>Select whether new sets of data can be imported and created or whether only existing sets of data are supposed to be refreshed. For the unambiguous identification of already imported data sets, the import key from the deployed XSLT file is compared.</p> <p><input checked="" type="checkbox"/> = New sets of data can be created. <input type="checkbox"/> = No new sets of data.</p> |
| <i>Delete objects from previous imports</i> | <p>Select whether existing sets of data which have been imported with other import jobs are supposed to be deleted if they are not contained in the current import file.</p> <p><input checked="" type="checkbox"/> = Sets of data from other imports are deleted. <input type="checkbox"/> = Sets of data from other imports are not deleted.</p> <p>NOTICE! In the event of an error during the import, the function is deactivated automatically, i. e. no sets of data are deleted. NOTICE! Manually created sets of data are not deleted.</p> |
| <i>Update system user if login data are the same</i> | <p>Select whether existing user data can be imported and updated if it does not have an import key but the user name is known.</p> <p><input checked="" type="checkbox"/> = User data can be updated. <input type="checkbox"/> = User data cannot be updated.</p> |

Group field Stop Criteria

| | |
|---|---|
| <i>Maximum number of allowed errors</i> | <p>Select whether the import job is supposed to be canceled when an error occurs. Possible errors are failing to assign a PBX, not being able to find a role or organization unit or a user missing essentially required attributes.</p> |
|---|---|

| | |
|---|---|
| | <input checked="" type="checkbox"/> = Import job is canceled when the number of errors entered here is exceeded. <input type="checkbox"/> = Import job is not canceled. |
| <i>Maximum number of allowed delete processes</i> | <p>Select whether the deletion process is supposed to be canceled if automatic deletion processes occurs.</p> <p>If the option <i>Delete objects from previous imports</i> has been selected in the group field <i>Create and Delete Objects</i>, then this option here allows selecting the maximum number of data sets which can be deleted before the deletion process is canceled. If the entered number is exceeded, no data sets are deleted.</p> <p><input checked="" type="checkbox"/> = Deletion process is canceled when the number of deletion processes entered here is exceeded. <input type="checkbox"/> = Deletion process is not canceled.</p> |

Tab Schedule



Unify Phones [X]

< Details* Import Options **Schedule**

Execution ☒ Once
☐ Interval
☐ Series

Period of Time ▼

Start ☒ Immediately
☐ 01/17/2019 13:23:03

End ☒ Never
☐ 01/17/2019 13:23:03

Interval ▼

0 Month(s) 0 Day(s) 0 Hour(s)
 5 Minute(s)

Save **Reset**

Fig. 17: Configuration Import module - Import configuration tab Schedule

In the general section, define how often the job is supposed to be executed.

| | |
|------------------|---|
| Execution | Select the option <i>Once</i> if the job is supposed to be executed only for the migration and within the period defined in the group field <i>Period of Time</i> . |
|------------------|---|



Group field Period of Time

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

Period of Time ▼

| | |
|-------|---|
| Start | <input checked="" type="radio"/> Immediately <input type="radio"/> 11/16/2018 08:10:46 |
| End | <input checked="" type="radio"/> Never <input type="radio"/> 11/16/2018 08:10:46 |

Fig. 18: Schedule - Period of Time

| | |
|--------------|--|
| Start | <ul style="list-style-type: none"> • <i>Immediately</i> Select this option if the job is supposed to be started immediately. • Entered date The start is defined by the entered date and time. To avoid putting an extra strain on the system in peak times, configure the job for a more convenient time of the day. You can enter the date directly via the keyboard or via the calendar icon . |
| End | <ul style="list-style-type: none"> • <i>Never</i> Select this option if the job is never supposed to end. • Entered date If you have configured a time, then the end is defined by the entered date and time. You can enter the date directly via the keyboard or via the calendar icon . |



For further information about using the Configuration Import module refer to the administration manual for tenants *Import of configuration data*.

1. Click on the button **Save** to apply the settings.

6 Migration of recordings

6.1 Supported formats

Migration types

| | |
|---|----------------------------------|
| <i>Migrating archive media</i> | <i>ASC legacy archive medium</i> |
| <i>Migrating meta data from an online storage</i> | <i>ASC legacy storage</i> |
| <i>Migrating recordings and meta data from the</i> | <i>ASC legacy integration</i> |
| <ul style="list-style-type: none"> • <i>call pool</i> • <i>Storage expansions</i> | |

Depending on the selected migration type, either recordings and the corresponding additional data are transferred or the additional data is transferred into the destination system as a reference to the data of the archive medium.

ASC legacy archive medium - archive media



ASC recommends to use this method for migration purposes.

ASC recommends to archive all recordings before carrying out a migration. This is the safest and easiest way to carry out a migration. It does not create any load on the network and requires a minimum of computer performance.

With this format, only meta data is imported. The archive medium is made known to the neo server by means of the import function.

ASC legacy storage - online storage

Migrating meta data

You can use the online storage with the recording data like an archive drive and exclusively import the meta data for access. The recording data remains on the former online storage and can then be accessed from the neo server after the import. After the migration, you cannot continue to use the online storage as storage location for new recordings as the drive has received a write protection which cannot be removed. In this case, you have to set up a neo storage expansion where new recordings can be stored.

ASC legacy integration - Call pool, storage expansions

Migrating meta data and recordings

With this format, you import the meta data and the corresponding recording data which have been created with a V10 server.

The transfer can be carried out from the following storage locations:

- *Call Pool*
- *Online storage*

You can select either [FTP](#) transfer or file transfer ([CIFS](#)) to transfer data. For the transfer by means of [SDDM](#), you have to create and share directories in the destination system into which the data is supposed to be written, see [chapter "Prepare neo server for the CIFS transfer"](#), p. 32.

6.2

Conditions

The following conditions are valid for all migration types:

1. **SDDM** version 4.30.36 or higher must have been installed on the V10 server for the **SDDM** transfer.
2. Recordings must be in V10 format.
3. A recording profile with the recording source *Import* must have been configured on the neo server.
4. A PBX type must have been configured on the neo server. If not the PBX type as in V10 is used, configure the type *Universal Import*.
5. A recording architecture must have been configured on the neo server.
6. The function *Import* must have been activated on the neo server.
7. Questions of mapping additional data must have been answered in advance and the mapping must have been configured on the neo server, if required.
8. After the import with the import format ASC legacy storage, only the meta data with the option *Time To Live* can be deleted.
9. After the import with the import format ASC legacy integration the meta data and the recordings with the option *Time To Live* can be deleted.

Restriction

- Once the import is complete, a post-compression of the recordings is no longer possible.

6.3

Migrating archive media

If customers have used archiving in the V10 system and access to the archive media is granted from the neo server, the information is imported via the respective medium in the neo server by means of the import ASC legacy archive medium. To use archive media on the neo server, no export from the V10 server is required.

Preconditions

- *All recordings must have been archived in the V10 format.*
- The existing archive media, e. g. NAS, RDX, DVD-ROM, must be terminated.
- *Write protection must be deactivated on the terminated archive media for deletion once the **TTL** has expired.*
- *The archive media must have been disconnected from the V10 server before the import.*
- *The archiving drives must have been configured in the neo server.*



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



Archive drives which have been migrated cannot be continued to be used for archiving purposes as a write protection is set for them during migration.

Post-processing of conversation data such as deleting, archiving, transfer, export or compression are not possible.

Import of V10 Archives Meta Data only

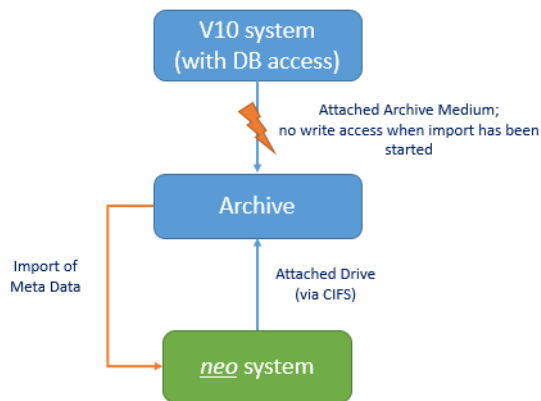


Fig. 19: Migration for archive media

Import ASC legacy archive medium

1. Open the application *System Configuration* and log in as system administrator.
2. Select the menu item *Setup > Recording Import* in the navigation bar.

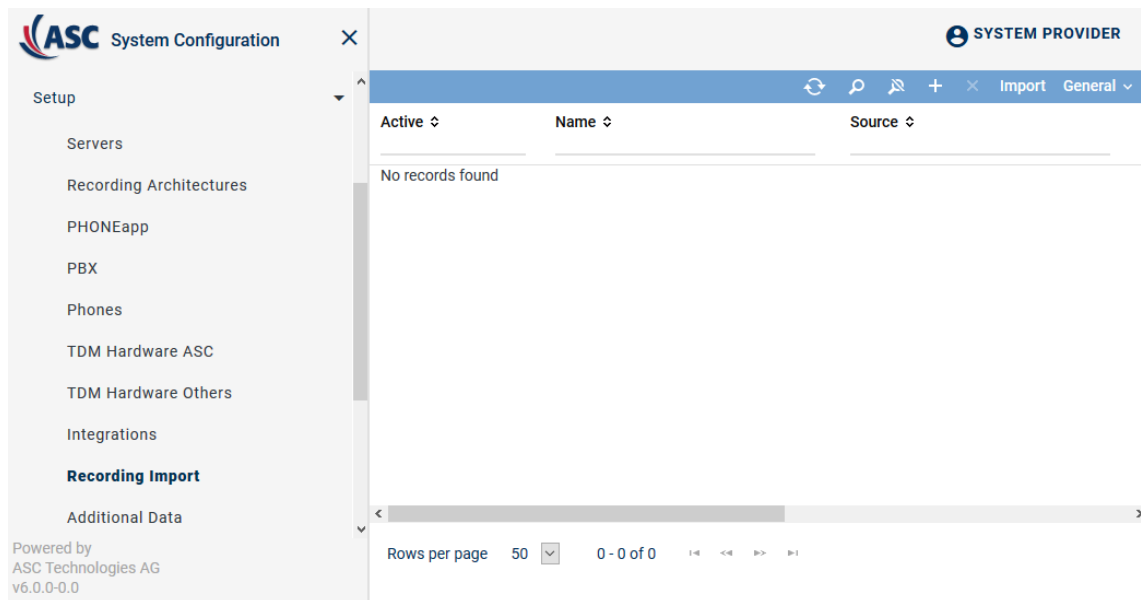



Fig. 20: Recording Import - main view

3. Click on the icon  (Create) in the toolbar of the main view.
4. Adjust all required settings in the tabs *Details*, *Drives*, and *Mapping* in the detail view. You can change tabs without buffering. The settings are not lost. Once you have adjusted all settings, save the configuration.

6.3.1

Tab Details

1. Select the tab *Details* to configure the job.

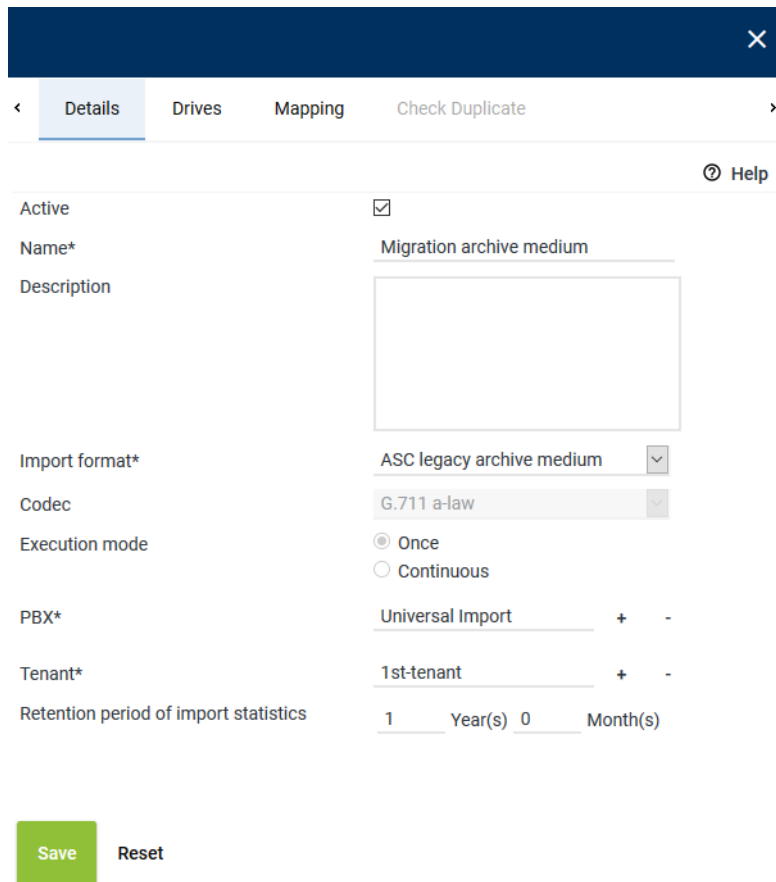



Fig. 21: Tab Details - Configure import for archive media

| | |
|-----------------------|--|
| 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> |
| Name | Enter the name of the import job. |
| Description | Here, you can enter a description for import job. |
| Import format | <p>Select the import format for the archive media from the drop-down list:</p> <ul style="list-style-type: none"> • ASC legacy archive medium <p>With the import format ASC legacy archive medium all archiving information (additional data) is imported from the archive medium to the <u>neo</u> server.</p> |
| Codec | This setting has been preselected and cannot be changed for this import format. |
| Execution mode | This import job is always executed only once. This setting has been preselected and cannot be changed for this import format. If the import has to be executed once again for some reason, you have to deactivate the import job, activate it again and save it. |
| PBX | By clicking on the button + , select the PBX for which the data is supposed to be imported, see chapter "Assign PBX" , p. 28. |


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.

Tenant

In a multi-tenant system, you have to run a separate import job for each tenant. Select which tenant the imported data is supposed to be mapped to.

Click on the button  to select the tenant that you would like to map the imported data to, see [chapter "Assign tenant", p. 29](#).

6.3.1.1 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 |

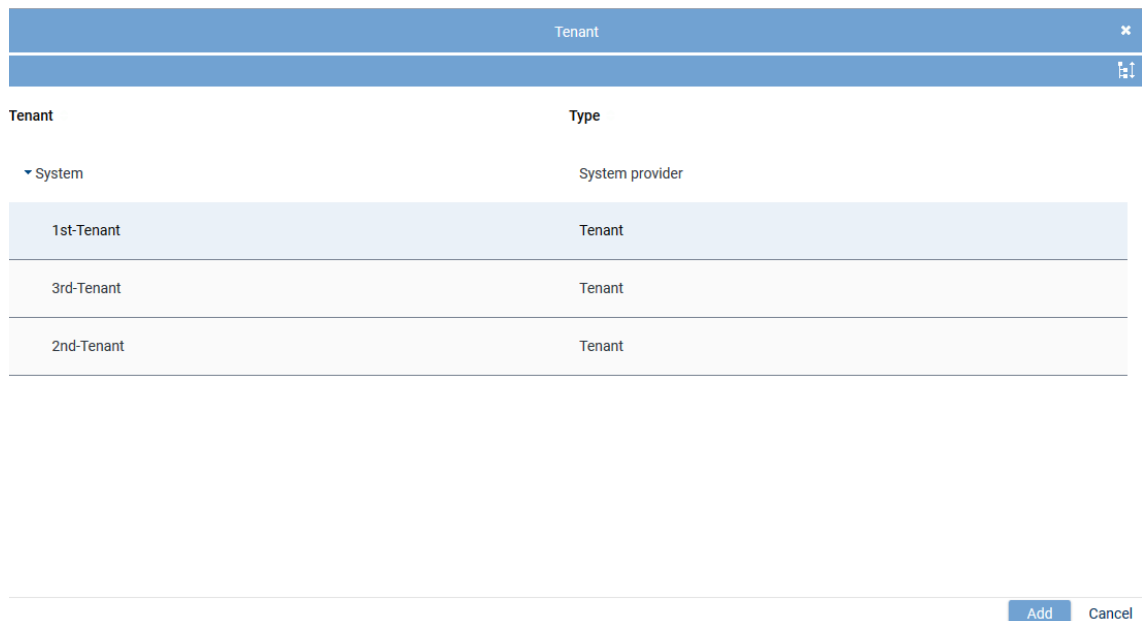
Rows per page: 20 | 1 - 20 of 21 | Add | Cancel

Fig. 22: Add PBX

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

6.3.1.2 Assign tenant

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



| Tenant | Type |
|------------|--------|
| 1st-Tenant | Tenant |
| 3rd-Tenant | Tenant |
| 2nd-Tenant | Tenant |

Fig. 23: Add tenant

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

6.3.2 Tab Drives

1. Select the tab *Drives* to define the source drive.

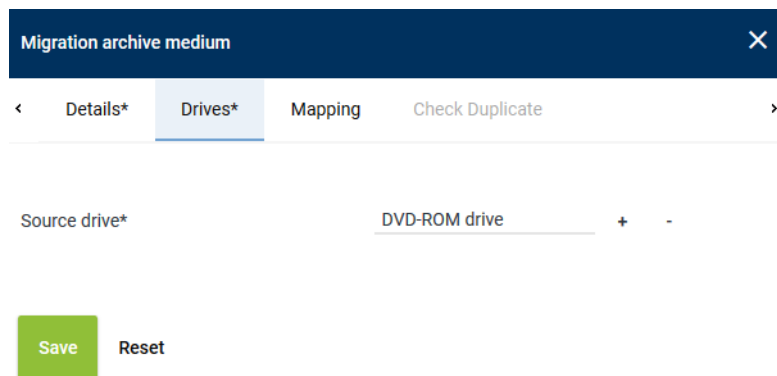


Fig. 24: Tab Drives - Select drive for archive medium

| | |
|--------------|--|
| Time zone | Select the time zone from the drop-down list that the time indicated in the data to be imported refers to. |
| Source drive | By clicking on the button + , select the drive from which the meta data is supposed to be imported, see chapter "Assign drive", p. 29 . |

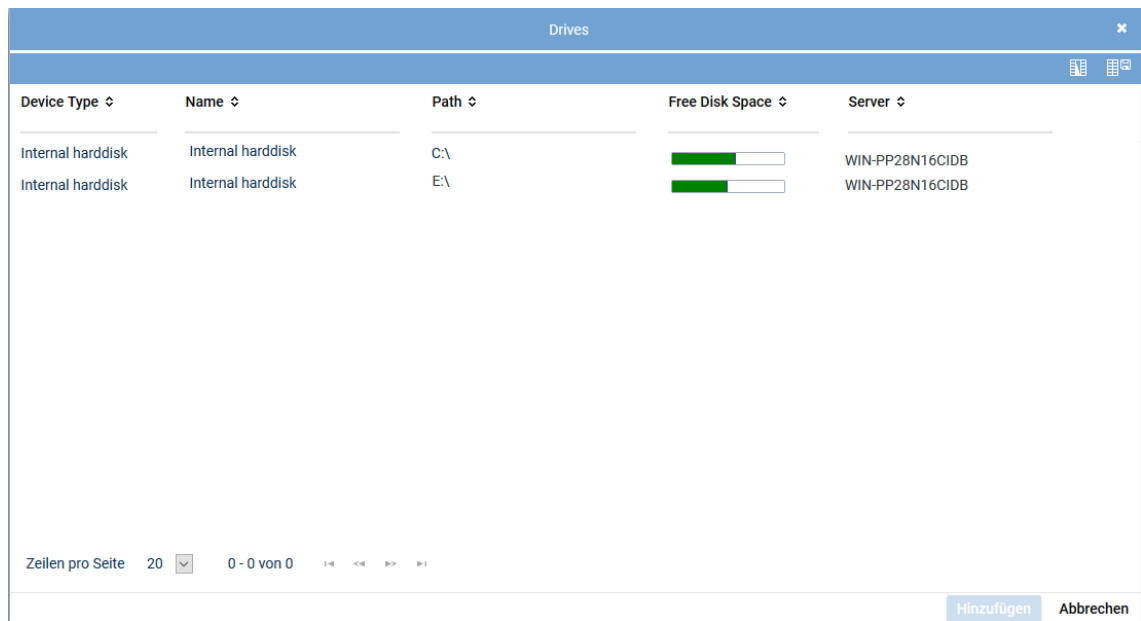


When using the import format ASC legacy archive medium, you have to enter the drive which contains the archived data as the source drive.

6.3.2.1 Assign drive

1. Click on the button **+** on the right of the entry field.

2. Select a drive from the list.



| Device Type | Name | Path | Free Disk Space | Server |
|-------------------|-------------------|------|------------------------|----------------|
| Internal harddisk | Internal harddisk | C:\ | <div><div></div></div> | WIN-PP28N16CIB |
| Internal harddisk | Internal harddisk | E:\ | <div><div></div></div> | WIN-PP28N16CIB |

Zeilen pro Seite: 20 0 - 0 von 0

Hinzufügen Abbrechen

Fig. 25: Add drive (example)

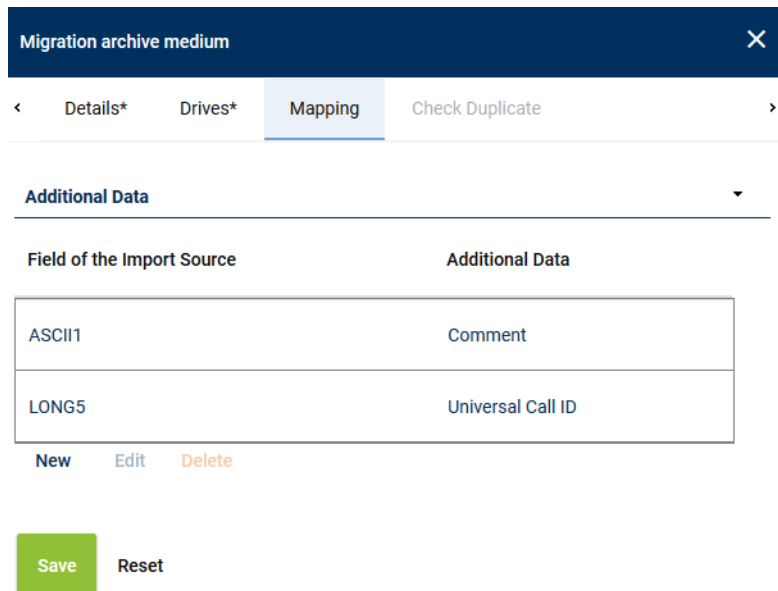
3. To apply the selection, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

6.3.3

Tab Mapping

1. Select the tab *Mapping* to map the additional data.

In the group field *Additional Data*, you can define how additional data is supposed to be read out of the import source and mapped to the additional data types defined in the Additional Data module.



Migration archive medium

Details* Drives* Mapping Check Duplicate

Additional Data

| Field of the Import Source | Additional Data |
|----------------------------|-------------------|
| ASCII1 | Comment |
| LONG5 | Universal Call ID |

New Edit Delete

Save Reset

Fig. 26: Tab Mapping of the additional data (example)

| | |
|-----------------------------------|--|
| <i>Field of the Import Source</i> | Shows from which field of the import data set the information is read out. |
|-----------------------------------|--|

| | |
|------------------------|---|
| <i>Additional Data</i> | Shows which additional data field (<i>CustomCP field</i>) the information has been mapped to. |
|------------------------|---|

Tab. 2: Group field ASCII Mapping

6.3.3.1 Map additional data

1. In the group field *Additional Data*, click on the button *New* or *Edit*.

⇒ The following window appears:

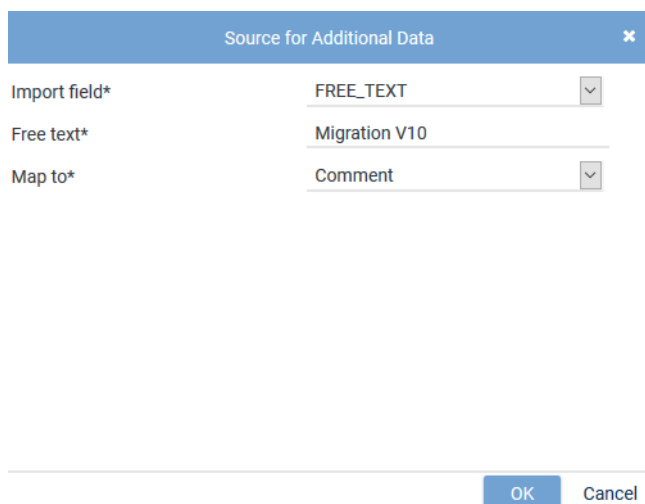


Fig. 27: Edit source for additional data (example for legacy import formats)

| | |
|---------------------|--|
| <i>Import field</i> | From the drop-down list, select the import field which is supposed to be read out of the import data set. Depending on the selected import job, different fields are available. See chapter "Map additional data", p. 9 . If you would like to add free text to the imported data, select the entry FREE_TEXT from the drop-down list. |
| <i>Free text</i> | If you have selected the entry FREE_TEXT in the import field, you must enter free text into the entry field. |
| <i>Map to</i> | From the drop-down list, select the additional data field that the information from the import field is supposed to be mapped to. Only additional data fields are displayed here which have previously been configured in the Additional Data module. |



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

2. In the detail view, click on the button *Save* to save the import job.

⇒ Upon activating the import job, the import starts.

6.4 Migration by means of SDDM transfer

6.4.1 Export from V10 server



To migrate recordings and meta data from the online storage by means of a [SDDM](#) job, an SDDM version 4.30.36 or higher is required.

There are two alternatives to transfer data via [SDDM](#):

- [SDDM](#) job by means of [CIFS](#) transfer (file transfer)
- [SDDM](#) job by means of [FTP](#) transfer



ASC recommends transfer by means of [CIFS](#) with network share.

The migration job is created in the application ASC DataManager.

6.4.1.1 Configure SDDM job for CIFS transfer

6.4.1.1.1 Prepare neo server for the CIFS transfer

For an [SDDM](#) transmission with a migration job by means of file transfer from the V10 server to the [neo](#) server, you must take the following measures on the target server:

1. Create a user, e. g.
 - *sddmV10*
2. Create 2 directories, e. g.
 - *ASCDATA\EvoIndexData* - for the meta data
 - *ASCDATA\EvoCallData* - for the recordings
3. Configure the network share so that the user can access the created directories:
 - *ASCDATA\EvoIndexData*
 - *ASCDATA\EvoCallData*

The information refers to the following exemplary description. The names can be selected arbitrarily but must be consistent.

Create user for CIFS transfer

For the file transfer via [CIFS](#) it is necessary to create a user and give them access to the target directories.

1. To create a user, open the control panel via *Control Panel > Computer Management*.
2. Select the menu item *Local Users and Groups*.
3. Right-click on the directory *Users* in the structure view.
4. Click on the entry *New User* in the context menu to create a new user.
 - ⇒ The window *New User* appears.

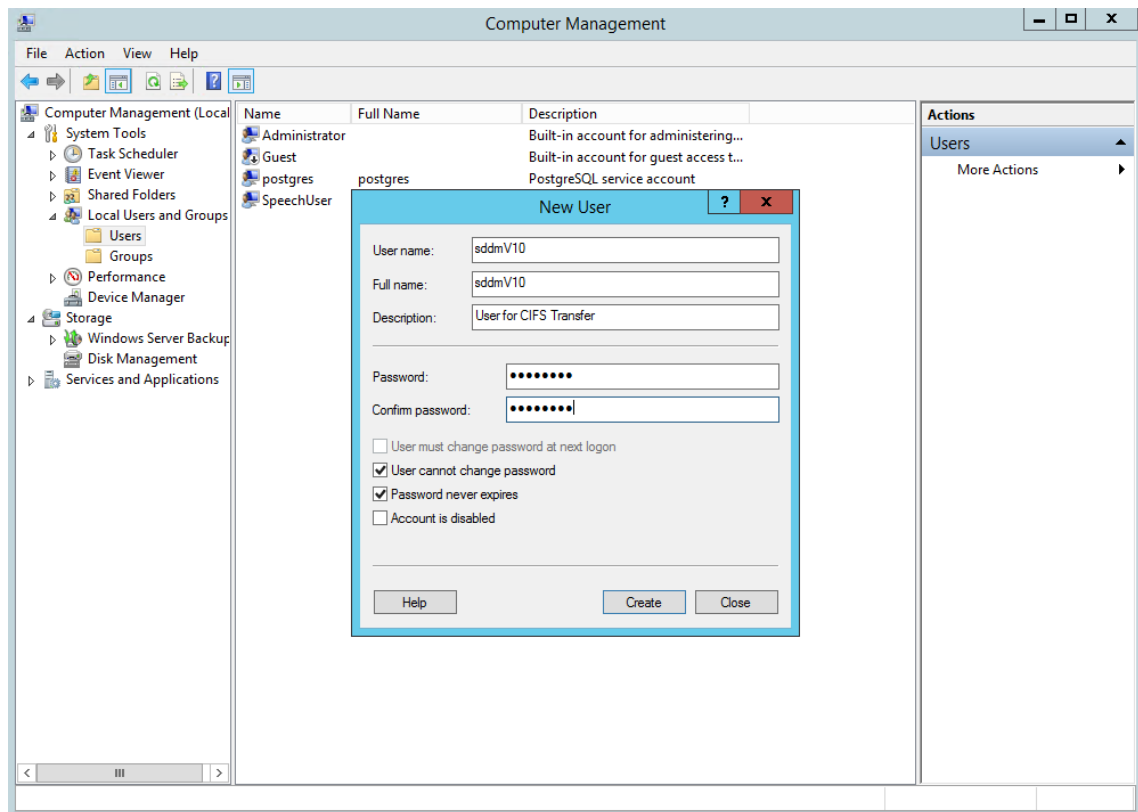


Fig. 28: Create user sddmV10

5. In the entry field *User name*:, enter a name for the user, e. g. *sddmV10*.
6. In the entry field *Password*, enter a password. The password can be selected arbitrarily.
7. To confirm the password, enter it once again in the entry field *Confirm password*.
8. Activate the check box *User cannot change password*.
9. Activate the check box *Password never expires*.
10. Click on the button *Close* to save the entries.
⇒ The user now appears in the list of users.

Create directories for CIFS transfer

1. On the *neo* server, create the directories where the data from the V10 server is supposed to be stored:
 - *ASCDATA\EvoIndexData* - for the meta data
 - *ASCDATA\EvoCallData* - for the recordings
2. Open the Windows Explorer.
3. Go to the drive *ASCDATA*.
4. Create the directories *EvoIndexData* and *EvoCallData* in this directory.

Configure network share for CIFS transfer

To enable the user who carries out the transfer to access the directories, you have to share these directories in the network with the user.

1. Select the directory *ASCDATA\EvoIndexData* in the Windows Explorer.
2. In the context menu, click on the entry *Properties*.
⇒ The window *EvoIndexData Properties* appears.
3. Select the tab *Sharing*.

4. Click on the button *Advanced Sharing*.
⇒ The window *Advance Sharing* appears.
5. Click on the button *Permissions*.
⇒ The window *Permission for EvoIndexData* appears.

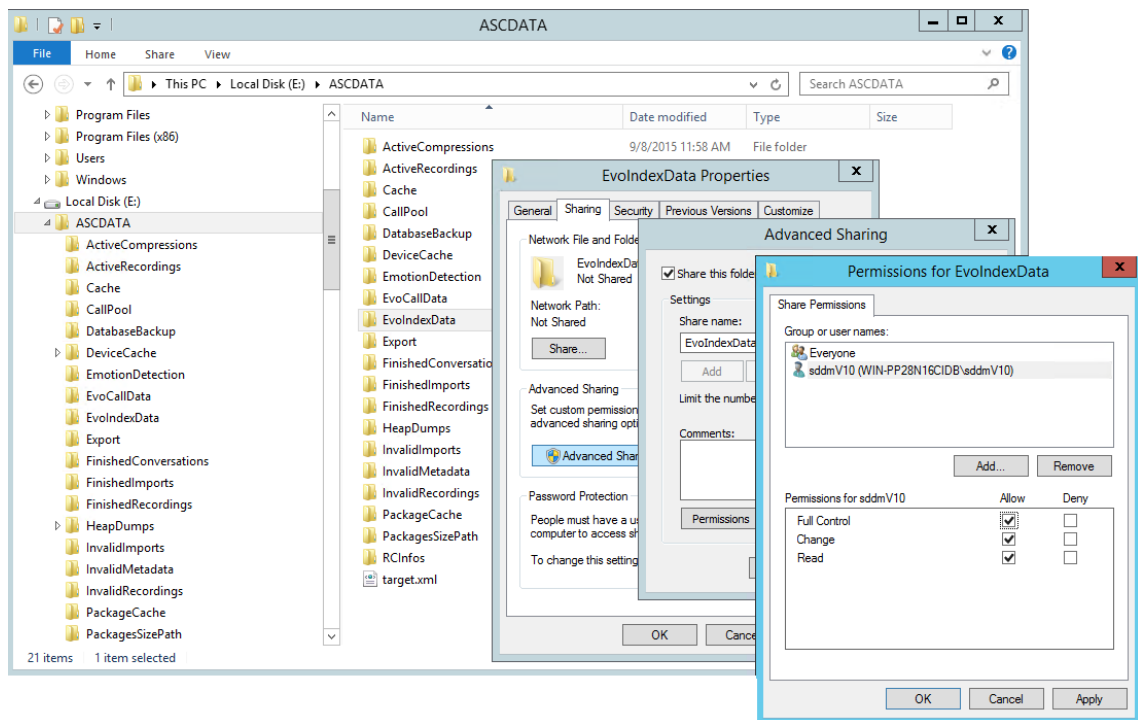


Fig. 29: Assign access authorization for sddmV10

6. In the field *Group or user names*, select the name of the user *sddmV10*.
7. In the field *Permissions for sddmV10*, activate the check box *Allow Full Control*.
8. Click on the button *OK* to save the assignment.
9. Select the directory *ASCDATA\EvoCallData* in the Windows Explorer.
10. Repeat the steps for this directory.
11. Click on the button *OK* to save the assignment.

Configure network card in the destination system

For the network card of the destination system, the option *File and Printer Sharing for Microsoft Networks* must have been activated.

1. Open the window *Network and Sharing Center* (network connection) via *Control Panel > Network and Internet > Network and Sharing Center* to activate network sharing.
2. Activate the check box for the option *File and Printer Sharing for Microsoft Networks*.

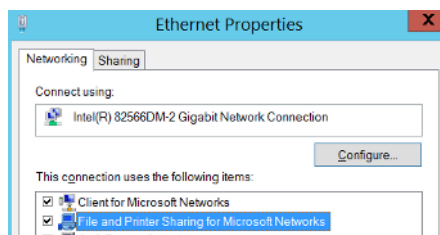


Fig. 30: Network sharing has been activated

3. Click on the button *OK* to save the setting.

6.4.1.1.2 Configure CIFS transfer

1. On the source server, open the application ASC DataManager.
2. Select the menu item *SDDM Client > Job Configuration*.

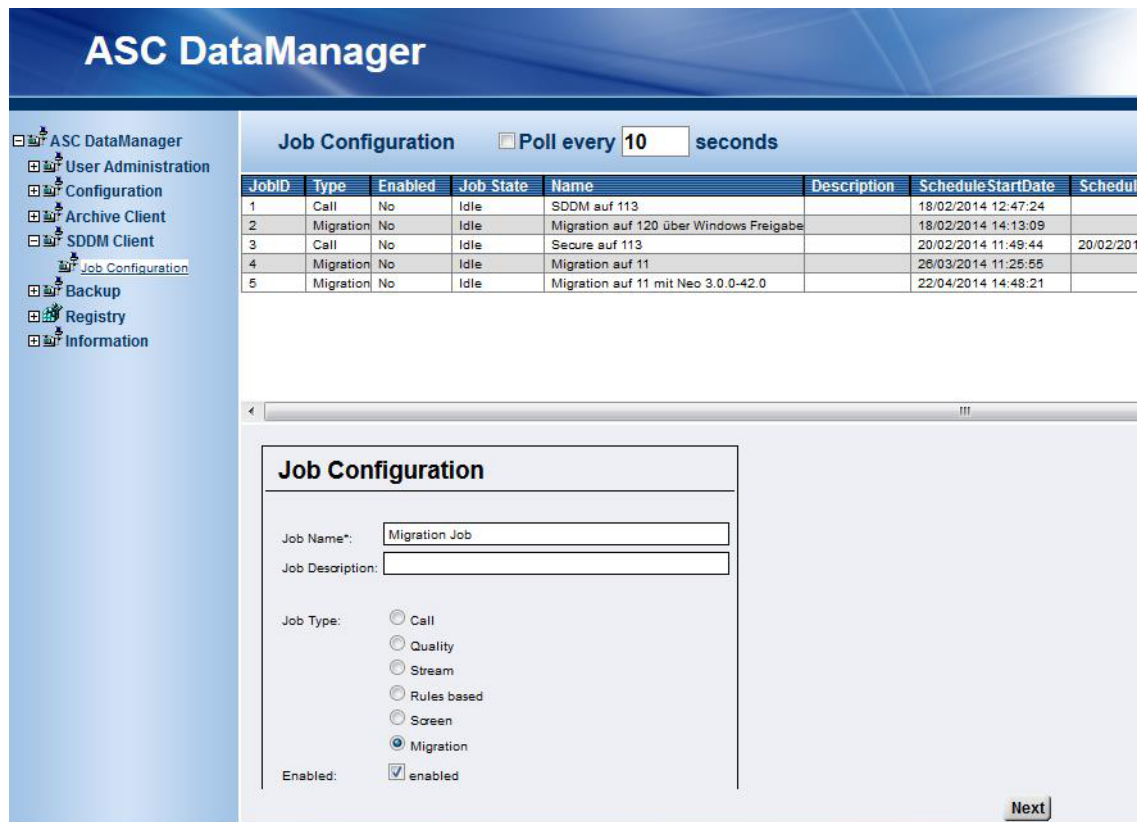


Fig. 31: ASC Data Manager - SDDM client - Configure transfer job

3. Adjust the following settings:

| | |
|------------------|--|
| <i>Job name</i> | Enter a descriptive name for the job. |
| <i>Job type</i> | Select the option <i>Migration</i> for this job. |
| <i>Activated</i> | <p>Activate the check box if the job is supposed to be executed directly upon saving.</p> <p>NOTICE! You can activate the migration job subsequently, too.</p> <p><input checked="" type="checkbox"/> = Function has been activated.</p> <p><input type="checkbox"/> = Function has not been activated.</p> |

4. Click on the button *Next* to define the transfer type.
5. In the field *Transfer Type*, select the option *File Transfer* if you would like to transfer the data to the target directories by means of **CIFS**.

| Transfer Settings 1/2 | | | | | | | | | | |
|--|---|---|---|---|---|--|--|--|--|--|
| Transfer Type <input type="radio"/> FTP Transfer <input checked="" type="radio"/> File Transfer | Transfer Data <input type="radio"/> Local Data <input type="checkbox"/> Only calls from the time: <input type="text"/> (YYYY/DD/MM) <input checked="" type="radio"/> Unarchived Data | Tagger <input checked="" type="radio"/> Bulk <input type="radio"/> Rules Based | | | | | | | | |
| Destination <table border="0"> <tr> <td>Address (Indexfiles)*: <input type="text" value="192.168.169.147"/></td> <td>Address (Audiofiles)*: <input type="text" value="192.168.169.147"/></td> </tr> <tr> <td>Path (Indexfiles)*: <input type="text" value="EvoIndexData"/></td> <td>Path (Audiofiles)*: <input type="text" value="EvoCallData"/></td> </tr> <tr> <td>Username (Indexfiles)*: <input type="text" value="192.168.169.147/sddmV10"/></td> <td>Username (Audiofiles)*: <input type="text" value="192.168.169.147/sddmV10"/></td> </tr> <tr> <td>Password (Indexfiles)*: <input type="password" value="*****"/></td> <td>Password (Audiofiles)*: <input type="password" value="*****"/></td> </tr> </table> | | | Address (Indexfiles)*: <input type="text" value="192.168.169.147"/> | Address (Audiofiles)*: <input type="text" value="192.168.169.147"/> | Path (Indexfiles)*: <input type="text" value="EvoIndexData"/> | Path (Audiofiles)*: <input type="text" value="EvoCallData"/> | Username (Indexfiles)*: <input type="text" value="192.168.169.147/sddmV10"/> | Username (Audiofiles)*: <input type="text" value="192.168.169.147/sddmV10"/> | Password (Indexfiles)*: <input type="password" value="*****"/> | Password (Audiofiles)*: <input type="password" value="*****"/> |
| Address (Indexfiles)*: <input type="text" value="192.168.169.147"/> | Address (Audiofiles)*: <input type="text" value="192.168.169.147"/> | | | | | | | | | |
| Path (Indexfiles)*: <input type="text" value="EvoIndexData"/> | Path (Audiofiles)*: <input type="text" value="EvoCallData"/> | | | | | | | | | |
| Username (Indexfiles)*: <input type="text" value="192.168.169.147/sddmV10"/> | Username (Audiofiles)*: <input type="text" value="192.168.169.147/sddmV10"/> | | | | | | | | | |
| Password (Indexfiles)*: <input type="password" value="*****"/> | Password (Audiofiles)*: <input type="password" value="*****"/> | | | | | | | | | |
| <input type="button" value="Back"/> <input type="button" value="Next"/> | | | | | | | | | | |

Fig. 32: Configure CIFS transfer

Group field Transfer Data

1. In the field *Transfer Data* select which data is supposed to be transferred.

| Parameter | Description |
|---------------------------------|--|
| <i>Local Data</i> | ≙ ASC legacy integration Recordings and meta data are transferred. In the process, the local hard disk and - as may be the case - the storage expansion are searched. NOTICE! This function is supported with SDDM version 4.30.36 and higher. |
| <i>Unarchived Data</i> | ≙ ASC legacy storage Meta data which has been stored in an online storage are transferred. |
| <i>Only calls from the time</i> | When activating this option, only those calls are transferred which have been recorded from the set date onwards. |

Tab. 3: Define transfer data

Group field Destination

1. In the field *Destination*, enter the connection data of the destination system.



Recommendation: Always enter the connection data for both target directories even if you transfer meta data only.



For an export from a Linux server in a domain, you have to enter a domain in the entry field for the user name for a successful connection. Observe the following syntax:
 <USER> , domain=<DOMAIN> instead of the usual <DOMAIN> / <USER>.



Use the previously created directories and users, see [chapter "Prepare neo server for the CIFS transfer"](#), p. 32.

| Parameter | Description |
|------------------------------|--|
| <i>Address (index files)</i> | Enter the IP address of the target server to which the meta data is supposed to be transferred. |
| <i>Path (index files)</i> | Only enter the name of the target directory for the meta data here, in the example <i>EvoIndexData</i> . |

| Parameter | Description |
|--------------------------------|---|
| <i>User name (index files)</i> | Enter the IP address and the user name which are supposed to be used to access the target directory for the meta data. The user for the CIFS transfer is the same for the index files and for the audio files, in the example <i>192.168.169.147/sddmV10</i> . |
| <i>Password (index files)</i> | Enter the password for the authentication. |

Tab. 4: Defining connection data for index files

| Parameter | Description |
|--------------------------------|--|
| <i>Address (audio files)</i> | Enter the IP address of the target server to which the audio data is supposed to be transferred. |
| <i>Path (audio files)</i> | Only enter the name of the target directory for the audio data here, in the example <i>EvoCallData</i> . |
| <i>User name (audio files)</i> | Enter the IP address and the user name which are supposed to be used to access the target directory for the audio data. The user for the CIFS transfer is the same for the index files and for the audio files, in the example <i>192.168.169.147/sddmV10</i> . |
| <i>Password (audio files)</i> | Enter the password for the authentication. |

Tab. 5: Define connection data for audio files

- Click on the button *Next* to save the entries.
⇒ A window to enter the connection parameters appears.

6.4.1.2 Configure SDDM job for FTP transfer

6.4.1.2.1 Prepare neo server for FTP transfer

For a migration job with **SDDM** transfer from the V10 server to the neo server, proceed as follows:

- Create the following users, e. g.:
 - *neo-db-user*
 - *neo-fs-user*
- Create the following directories, e. g.:
 - *ASCDATA\EvoIndexData* - for the meta data
 - *ASCDATA\EvoCallData* - for the recordings

The information refers to the following exemplary description. The names can be selected arbitrarily but must be consistent.

Create user for FTP transfer

For the **FTP** transfer it is necessary to create 2 users and give them access to the target directories.

- To create a user, open the control panel via *Control Panel > Computer Management*.
- Select the menu item *Local Users and Groups*.
- Right-click on the directory *Users* in the structure view.
- Click on the entry *New User* in the context menu to create a new user.
⇒ The window *New User* appears.

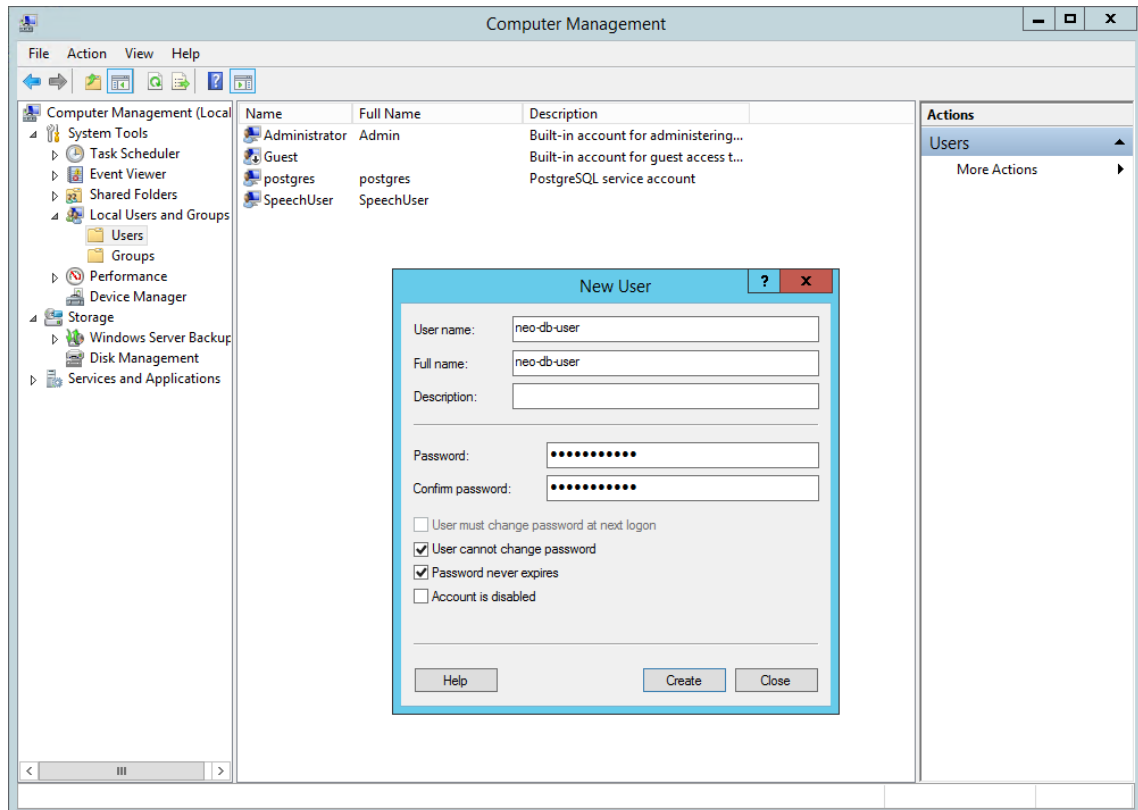


Fig. 33: Create user neo-db-user

5. In the entry field *User name*:, enter a name for the user, e. g. *neo-db-user*.
6. In the entry field *Password*, enter a password. The password can be selected arbitrarily.
7. To confirm the password, enter it once again in the entry field *Confirm password*.
8. Activate the check box *User cannot change password*.
9. Activate the check box *Password never expires*.
10. Click on the button *Create* to save the entries.
 - ⇒ The user now appears in the list of users.
11. Repeat the steps for the user *neo-fs-user*.

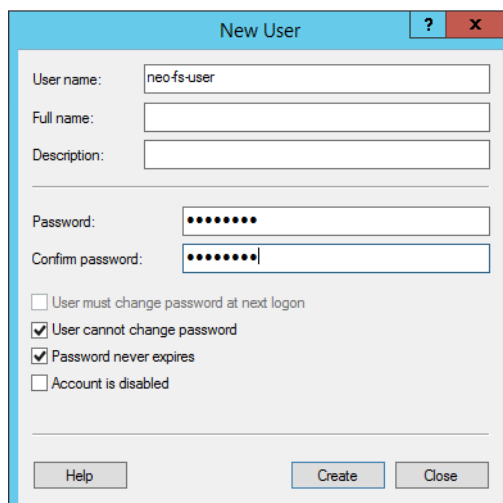


Fig. 34: Create user neo-fs-user

- ⇒ The two users now appear in the list of users.
12. Click on the directory *Groups* in the directory tree.

13. Right-click on the entry *Users*.
14. Click on *Add to Group* in the context menu.
 - ⇒ The window *User Properties* appears.
15. Click on the button *Add*.
 - ⇒ The window *Select Users* appears.

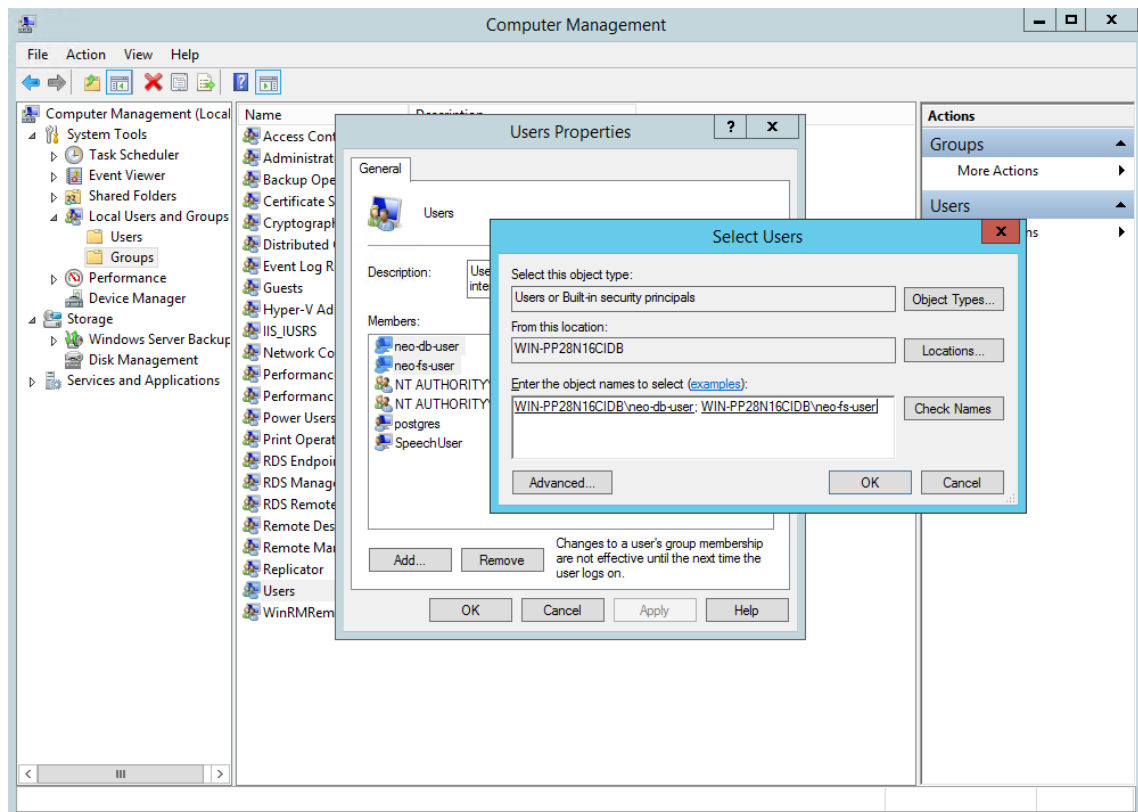


Fig. 35: Assign group

16. In the entry field *Enter the object names to select (examples)*, enter the names of the users separated by a semicolon and click on the button *Check Names*.
 - ⇒ If the users are found, their names appear as **FQDN** in the entry field.
17. Click on the button *OK* to confirm the assignation.

Create directories for FTP transfer

1. On the *neo* server, create the directories where the data from the V10 server is supposed to be stored:
 - *ASCDATA\EvoIndexData* - for the meta data
 - *ASCDATA\EvoCallData* - for the recordings
2. Open the Windows Explorer.
3. Go to the drive *ASCDATA*.
4. Create the directories *EvoIndexData* and *EvoCallData* in this directory.

6.4.1.2.2 Configure FTP transfer

1. On the source server, open the application *ASC DataManager*.
2. Select the menu item *SDDM Client > Job Configuration*.

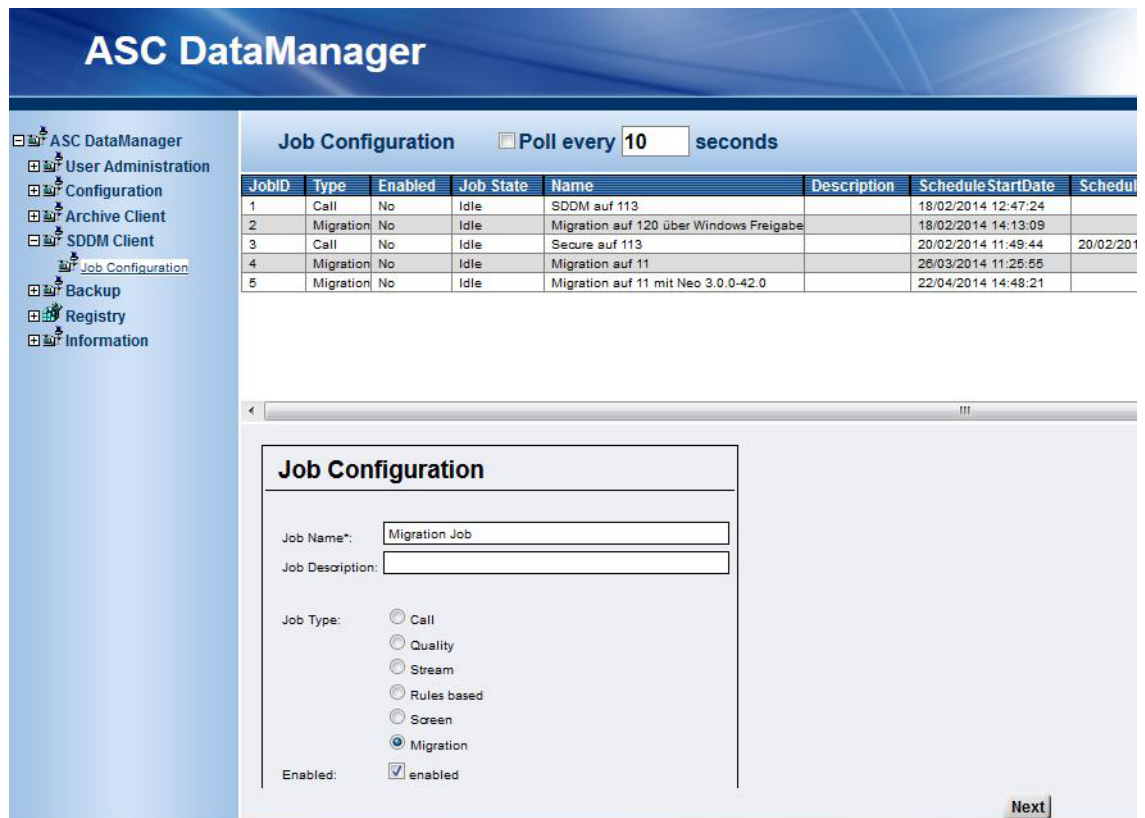


Fig. 36: ASC Data Manager - SDDM client - Configure transfer job

3. Adjust the following settings:

| | |
|------------------|---|
| <i>Job name</i> | Enter a descriptive name for the job. |
| <i>Job type</i> | Select the option <i>Migration</i> for this job. |
| <i>Activated</i> | Activate the check box if the job is supposed to be executed directly upon saving. NOTICE! You can activate the migration job subsequently, too. <input checked="" type="checkbox"/> = Function has been activated. <input type="checkbox"/> = Function has not been activated. |

4. Click on the button *Next* to define the transfer type.

Group field Transfer Type

To be able to receive data by means of **SDDM** via the **FTP** server, you have to install and configure the **IIS** (*Internet Information Services*).



For information about installing and configuring the **FTP** server, refer to the installation manual for system providers *Configuration Windows Server 2012 R2* or *Configuration Windows Server 2016*.

1. In the field *Transfer Type*, select the option *FTP Transfer* if you would like to use an **FTP** server.

Transfer Settings 1/2

| | | |
|--|---|---|
| Transfer Type <input checked="" type="radio"/> FTP Transfer <input type="radio"/> File Transfer | Transfer Data <input type="radio"/> Local Data <input type="checkbox"/> Only calls from the time: <input type="text"/> (YYYY/DD/MM) <input checked="" type="radio"/> Unarchived Data | Tagger <input type="radio"/> Bulk <input checked="" type="radio"/> Rules Based |
|--|---|---|

| Item | Description |
|-----------------------|-------------------------|
| 5VZ710X3UX | EVOp Channel 001 |
| 5VZ710X3UX-5VZ710X5SD | Stereo EVOp Channel 001 |
| 5VZ710X3UY | EVOp Channel 002 |
| 5VZ710X3UY-5VZ710X5SE | Stereo EVOp Channel 002 |
| 5VZ710X3UZ | EVOp Channel 003 |
| 5VZ710X3UZ-5VZ710X5SF | Stereo EVOp Channel 003 |
| 5VZ710X3V0 | EVOp Channel 004 |
| 5VZ710X3V0-5VZ710X5SG | Stereo EVOp Channel 004 |
| 5VZ710X3V1 | EVOp Channel 005 |
| 5VZ710X3V1-5VZ710X5SH | Stereo EVOp Channel 005 |
| 5VZ710X3V2 | EVOp Channel 006 |
| 5VZ710X3V2-5VZ710X5SI | Stereo EVOp Channel 006 |
| 5VZ710X3V3 | EVOp Channel 007 |
| 5VZ710X3V3-5VZ710X5SJ | Stereo EVOp Channel 007 |

| | |
|--|--|
| Destination Address (Indexfiles)*: <input type="text"/> 192.168.169.147 Port (Indexfiles)*: <input type="text"/> 21 Username (Indexfiles)*: <input type="text"/> evo-db-user Password (Indexfiles)*: <input type="password"/> ***** | Address (Audiofiles)*: <input type="text"/> 192.168.169.147 Port (Audiofiles)*: <input type="text"/> 21 Username (Audiofiles)*: <input type="text"/> evo-fs-user Password (Audiofiles)*: <input type="password"/> ***** |
|--|--|

Fig. 37: Configure FTP transfer



If you transfer the data via **FTP** transfer, an **FTP** server must have been set up on the target server.

For the **FTP** transfer by means of an **SDDM** job, a firewall routing must have been configured. *21/tcp (ftp) 22/tcp (sftp/ssh).*

Group field Transfer Data

1. In the field *Transfer Data* select which data is supposed to be transferred.

| Parameter | Description |
|---------------------------------|---|
| <i>Local Data</i> | ≙ ASC legacy integration Recordings and meta data are transferred. In the process, the local hard disk and the storage expansion are searched. NOTICE! This function is supported with SDDM version 4.30.36 and higher. |
| <i>Unarchived Data</i> | ≙ ASC legacy storage Meta data which has been stored in an online storage are transferred. |
| <i>Only calls from the time</i> | When activating this option, only those recordings are transferred which have been recorded from the set date onwards. |

Tab. 6: Define transfer data

Group field Tagger

1. In the group field *Tagger*, you can configure rules on how the transfer is supposed to be executed.

| Parameter | Description |
|--------------------|--|
| <i>Bulk</i> | Select this option if you would like to transfer all data. |
| <i>Rules Based</i> | Select this option if you would like to transfer data from different channels only. You can select several entries by holding the [Ctrl] key down and selecting the respective channels. |

Tab. 7: Define rules for the transfer

Group field Destination

1. In the group field *Destination*, enter the connection data of the destination system.



Recommendation: Always enter the connection data for both target directories even if you transfer meta data only.



Use the previously created directories and users, see [chapter "Prepare neo server for FTP transfer"](#), p. 37.

| Parameter | Description |
|--------------------------------|---|
| <i>Address (index files)</i> | Enter the IP address of the target server to which the meta data is supposed to be transferred. |
| <i>Port (index files)</i> | Enter the port of the target server for the meta data. Default port for FTP transfer 21; for SFTP 22. |
| <i>User name (index files)</i> | Enter the name of the user who is supposed to access the target directory for the meta data. E. g. for the index data <i>neo-db-user</i> |
| <i>Password (index files)</i> | Enter the password for the authentication. |

Tab. 8: Defining connection data for index files

| Parameter | Description |
|--------------------------------|--|
| <i>Address (audio files)</i> | Enter the IP address of the target server to which the audio data is supposed to be transferred. |
| <i>Port (audio files)</i> | Enter the port of the target server for the audio data. Default port for FTP transfer 21. |
| <i>User name (audio files)</i> | Enter the name of the user who is supposed to access the target directory for the audio data. E. g. for the audio file <i>neo-fs-user</i> |
| <i>Password (audio files)</i> | Enter the password for the authentication. |

Tab. 9: Define connection data for audio files

2. Click on the button *Next* to save the entries.
⇒ A window to enter the connection parameters appears.

6.4.1.3

Configure connection parameters

1. Configure the parameters to establish a connection.

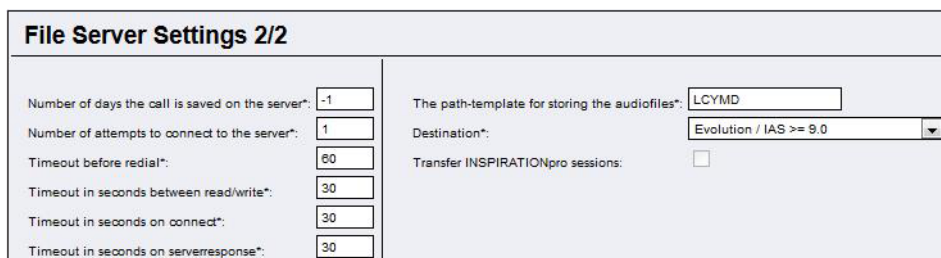


Fig. 38: Configure connection establishment

| Parameter | Description |
|--------------------------|--|
| <i>Number of days...</i> | Number of days that the transferred data is stored provided sufficient storage space is available on the hard disk. Possible range of values: -1 to 32765 |

| Parameter | Description |
|--|---|
| | Value = -1: Default value of the channel parameter. NOTICE! The configuration of this parameter may be exported, however, on the <i>neo</i> server, the <i>Time to Live</i> from the configuration from the profiles of the Recording Planner is used. |
| <i>Number of attempts...</i> | Number of automatic connection attempt in case the connection fails. |
| <i>Timeout before redial</i> | Waiting time until a new automatic connection attempt is started after a connection has been disconnected. |
| <i>Timeout in seconds before read/write</i> | Waiting time for read or write transfer of data. |
| <i>Timeout in seconds on connect</i> | Waiting time until a new automatic connection attempt is started as long as no connection could be established successfully (first connection). |
| <i>Timeout in seconds on server response</i> | Waiting time for server response in an existing control connection. |
| <i>The path template for storing the audio files</i> | Path template for the filing structure of the data on the target server. Example: <i>LCYMD (logger\channel\year\month\day)</i> The call files are then stored in the following format: <Call data path> \\LOGGER_10261536257\CHANNEL_001\YEAR_2006\MONTH_02\DAY_22 |
| <i>Destination</i> | Select the entry <i>Evolution/IAS >=9.0</i> to transmit data to a <i>neo</i> server. |
| <i>Transfer INSPIRATIONpro sessions</i> | This option is not available for migration jobs. |

Tab. 10: Configure connection establishment

- Click on the button *Next* to save the entries.
⇒ A window to enter the scheduling parameters appears.

6.4.1.4 Configure scheduling parameters

- Configure the parameters of the schedule.

Scheduling parameter

Startdatetime: (YYYY/DD/MM HH:MM:SS A)

☒ One time only
☐ Every n minutes
☐ Daily
☐ Weekly
☐ Monthly

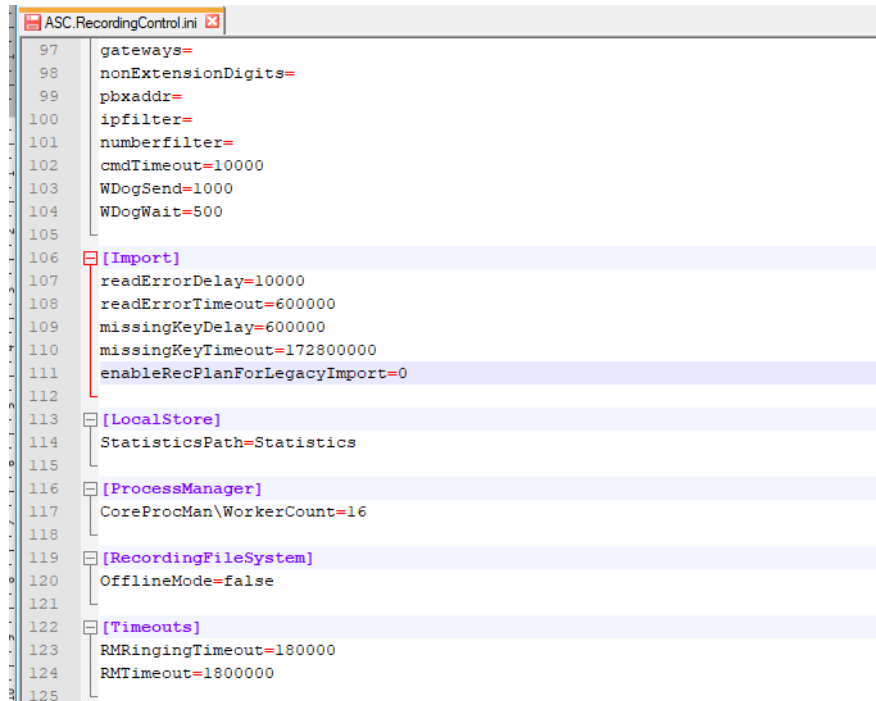
Fig. 39: Configure scheduling parameters

- In the entry field *Start date time*, enter the start date for the job.
- For a one-time migration select the option *Once*
- Click on the button *Save* to save the job configuration.
⇒ Once the migration job has been activated, the data is copied to the defined target directories according to the job configuration.

6.4.1.5 Configure retention period

To make sure that the retention period (TTL) can be applied by the SDDM job, the configuration file of recording control must be adjusted on the *neo* server.

1. To do so, change to the Windows Explorer to the installation directory:
%asc_install_path%\data\recordingcontrol
2. Open the configuration file *ASC.RecordingControl.ini* with the Editor.



```

97 gateways=
98 nonExtensionDigits=
99 pbxaddr=
100 ipfilter=
101 numberfilter=
102 cmdTimeout=10000
103 WDogSend=1000
104 WDogWait=500
105
106 [Import]
107 readErrorDelay=10000
108 readErrorTimeout=600000
109 missingKeyDelay=600000
110 missingKeyTimeout=172800000
111 enableRecPlanForLegacyImport=0
112
113 [LocalStore]
114 StatisticsPath=Statistics
115
116 [ProcessManager]
117 CoreProcMan\WorkerCount=16
118
119 [RecordingFileSystem]
120 OfflineMode=false
121
122 [Timeouts]
123 RMRingingTimeout=180000
124 RMTIMEOUT=1800000
125

```

Fig. 40: Parameters for retention period

3. In the section *Import*, search the following entry
enableRecPlanForLegacyImport

For this parameter, you can configure the following values:

- 0 = keep SDDM time
 - 1 = force keep forever
 - 2 = recplan
4. To apply the retention period from the source server, you must set the value to 0.

Section [Import]

- enableRecPlanForLegacyImport=0

6.4.2 Migrating meta data from a storage

If the customer works with an online storage and the data can be accessed from the neo server, only the meta data has to be migrated.

The former online storage is then used as an archive since a write protection is set for it during the migration which cannot be removed. For the new recordings, a new neo storage expansion must be created.

6.4.2.1 Importing meta data for online storage

If the customer would like to keep the drive for online storage as storage location which is supposed to be accessed from the neo server, you only have to transfer the meta data by means of a migration job with a **SDDM** transfer from the V10 server to the neo server.

Preconditions

- The recordings are available in the V10 format.
- It must be possible to access the online storage from the neo server.
- The connection to the V10 server is interrupted.

Procedure

- Meta data is exported from the V10 server by means of a migration job.
- Meta data is imported to the neo server by means of an import job.
- The connection from the V10 server to the online storage is interrupted.
- Connection of the neo server is established.

Import of V10 Online Storage Meta Data only

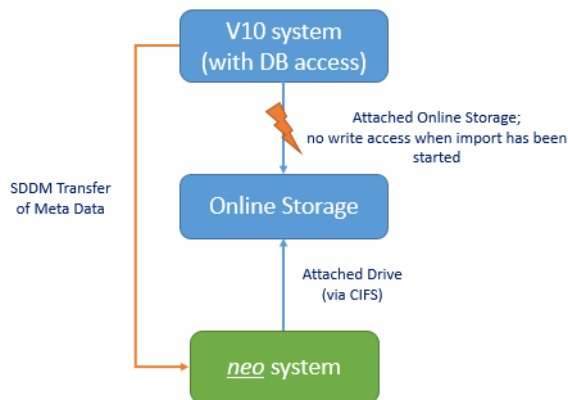


Fig. 41: Migrating meta data for online storage

Import ASC legacy storage

1. Open the application System Configuration and log in as system administrator.
2. Select the menu item *Setup > Recording Import* in the navigation bar.

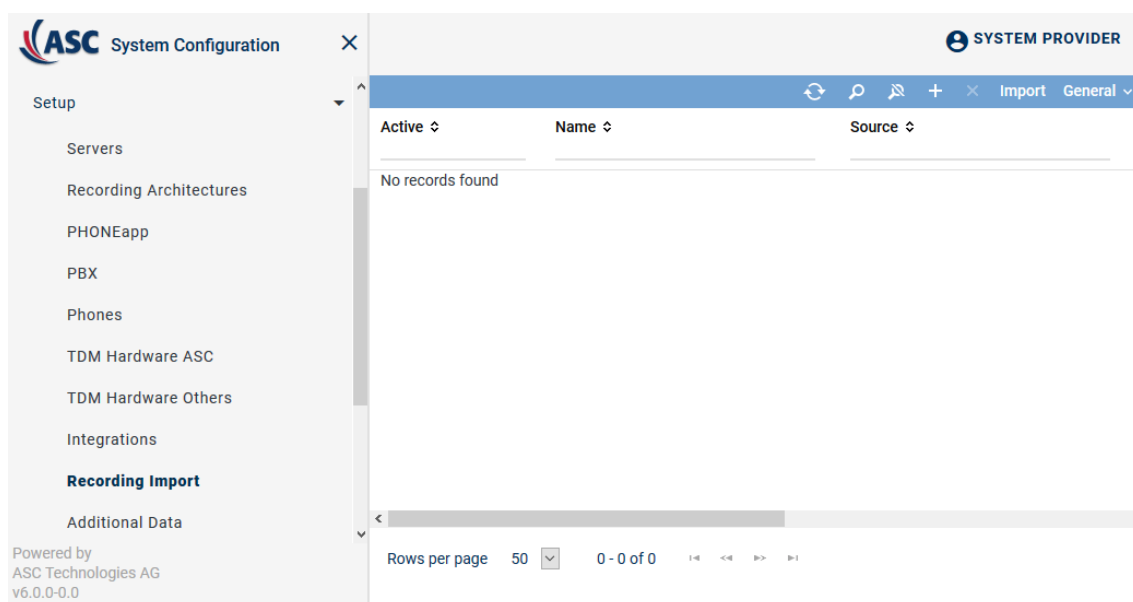



Fig. 42: Recording Import - main view

- Click on the icon  (*Create*) in the toolbar of the main view.
- Adjust all required settings in the tabs *Details*, *Drives*, and *Mapping* in the detail view. You can change tabs without buffering. The settings are not lost. Once you have adjusted all settings, save the configuration.

6.4.2.2

Tab Details

- Select the tab *Details* to configure the job.

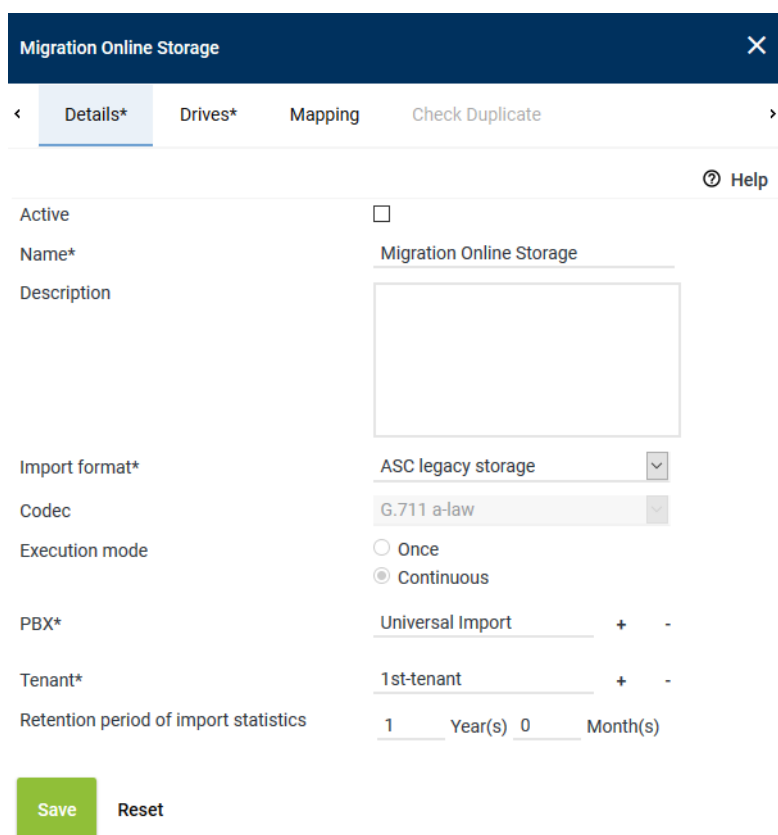




Fig. 43: Tab Details - Configure import for meta data from online storage

Active Tick the check box to activate the import job.

| | |
|-----------------------|---|
| | <input checked="" type="checkbox"/> = Job is active. <input type="checkbox"/> = Job is not active. |
| Name | Enter the name of the import job. |
| Description | Here, you can enter a description for import job. |
| Import format | Select the import format for the online storage from the drop-down list: <ul style="list-style-type: none"> • ASC legacy storage With the import format ASC legacy storage all meta data is imported to the <i>neo</i> server. |
| Codec | This setting has been preselected and cannot be changed for this import format. |
| Execution mode | This import job is always executed continuously. This setting has been preselected and cannot be changed for this import format. |
| PBX | By clicking on the button  , select the PBX for which the data is supposed to be imported, see chapter "Assign PBX", p. 28 . 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. |
| Tenant | In a multi-tenant system, you have to run a separate import job for each tenant. Select which tenant the imported data is supposed to be mapped to. Click on the button  to select the tenant that you would like to map the imported data to, see chapter "Assign tenant", p. 29 . |

6.4.2.3 Tab Drives

1. Select the tab *Drives* to define the source drive.

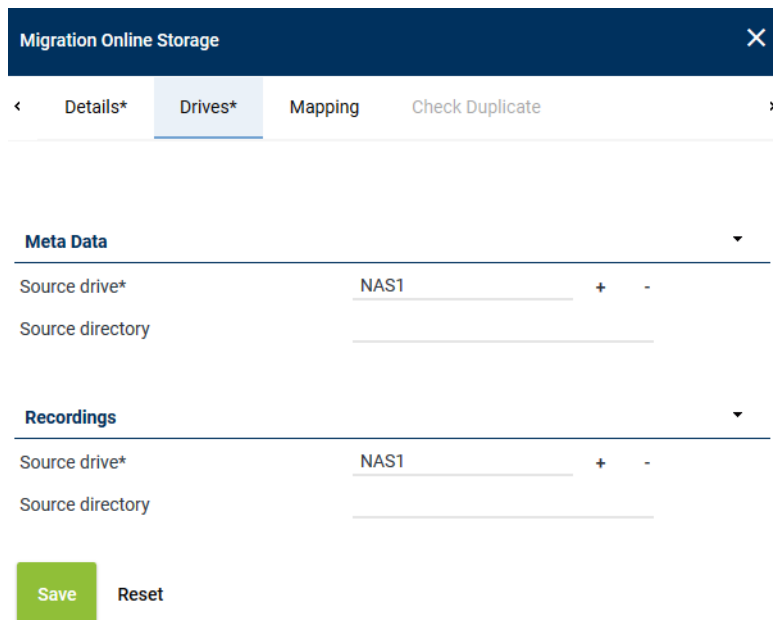


Fig. 44: Tab Drives - Configure drives for online storage

Group field *Meta Data*:

| | |
|---------------------|---|
| Source drive | Select the drive from which the additional data is supposed to be imported. See chapter "Assign drive", p. 29 . |
|---------------------|---|

Source directory Enter the path to the directory *ASCDATA\EvoIndexData* from which the meta data is supposed to be imported.

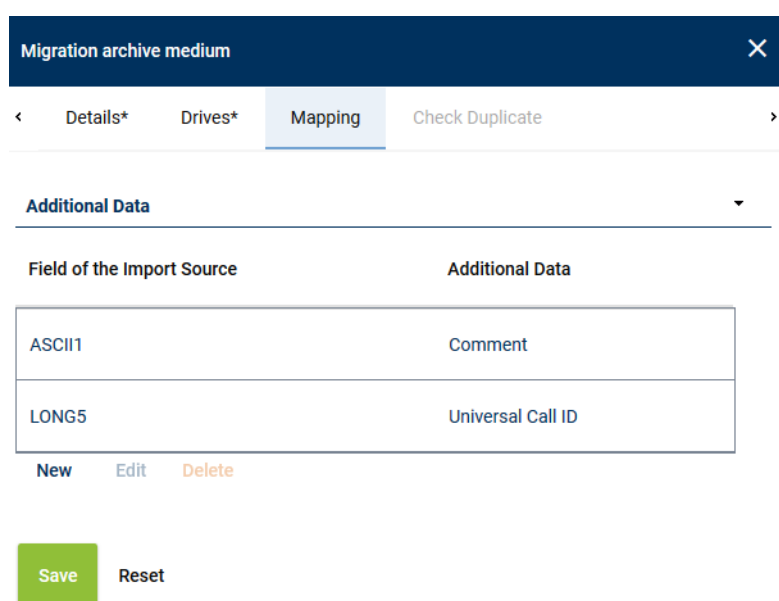
Group field *Recordings*:

| | |
|-------------------------|---|
| Source drive | <ul style="list-style-type: none"> When using the import format ASC legacy storage: Select the drive which contains the audio data. See chapter "Assign drive", p. 29. |
| Source directory | <ul style="list-style-type: none"> When using the import format ASC legacy storage: Enter the path to the directory in which the audio data has been stored. <ul style="list-style-type: none"> Until <i>neo</i> version 5.0.0.-43.3, you have to enter the number "1" in the path. With <i>neo</i> version 5.0.0.-48.0 or higher, the "1" is included automatically. |

6.4.2.4 Tab Mapping

1. Select the tab *Mapping* to map the additional data.

In the group field *Additional Data*, you can define how additional data is supposed to be read out of the import source and mapped to the additional data types defined in the Additional Data module.



Migration archive medium

< Details* Drives* Mapping Check Duplicate >

Additional Data

| Field of the Import Source | Additional Data |
|----------------------------|-------------------|
| ASCII1 | Comment |
| LONG5 | Universal Call ID |

New Edit Delete

Save Reset

Fig. 45: Tab Mapping of the additional data (example)

| | |
|-----------------------------------|---|
| Field of the Import Source | Shows from which field of the import data set the information is read out. |
| Additional Data | Shows which additional data field (<i>CustomCP field</i>) the information has been mapped to. |

Tab. 11: Group field ASCII Mapping

6.4.2.4.1 Map additional data

1. In the group field *Additional Data*, click on the button *New* or *Edit*.
⇒ The following window appears:

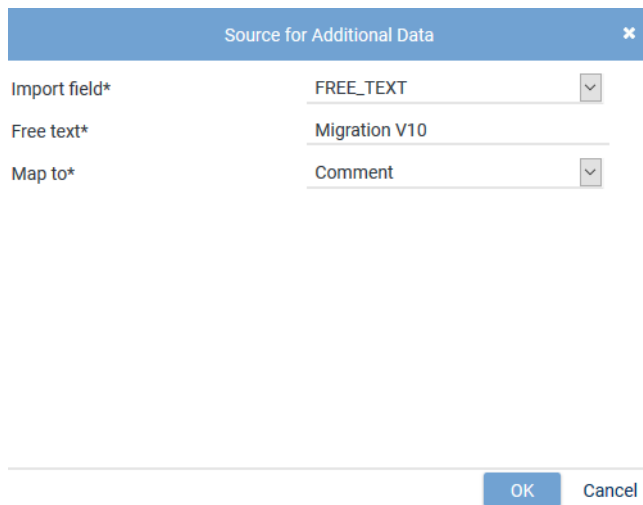


Fig. 46: Edit source for additional data (example for legacy import formats)

| | |
|---------------------|--|
| <i>Import field</i> | From the drop-down list, select the import field which is supposed to be read out of the import data set. Depending on the selected import job, different fields are available. See chapter "Map additional data", p. 9 . If you would like to add free text to the imported data, select the entry FREE_TEXT from the drop-down list. |
| <i>Free text</i> | If you have selected the entry FREE_TEXT in the import field, you must enter free text into the entry field. |
| <i>Map to</i> | From the drop-down list, select the additional data field that the information from the import field is supposed to be mapped to. Only additional data fields are displayed here which have previously been configured in the Additional Data module. |



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

2. In the detail view, click on the button *Save* to save the import job.
⇒ Upon activating the import job, the import starts.

6.4.3 Migrating meta data and recordings

Scenarios

- *Importing meta data and recordings from the local hard disk*
If no archiving exists, the meta data as well as the recordings have to be imported to the neo server.
- *Importing meta data and recordings from the online storage*
If the customer would like to continue using an online storage, a neo storage expansion has to be created and the recordings have to be copied to the new system completely. The former online storage cannot be continued to be used with the new system as its new online storage since it has received a write protection during the migration process which cannot be removed but avoids that data is stored in it.

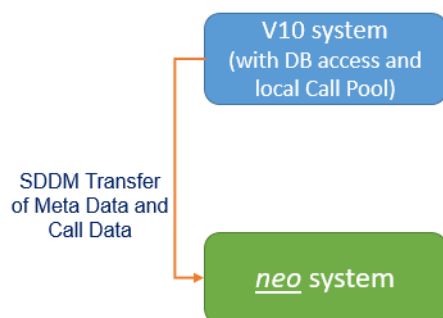
Procedure

- Meta data and recordings are exported from the V10 server with a migration job by means of [SDDM](#). ASC recommends transfer by means of [CIFS](#) with network share. Alternatively, transfer by means of [FTP](#) can be used.
- Meta data and recordings are imported to the neo server by means of the import job ASC legacy integration.



Importing meta data and recording may take a lot of time depending on the amount of data. The performance of the system may thus be restricted notably. For this reason, ASC recommends to archive the data and only import the information about the media.

Import of V10 Call Pool



Import of V10 Online Storage

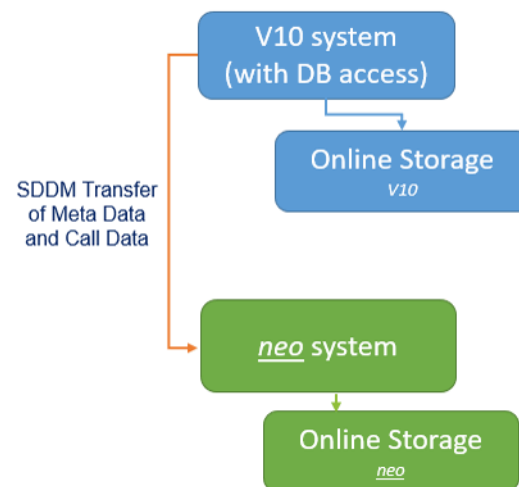


Fig. 47: Migrating meta data and recordings

Import ASC legacy integration

1. Open the application System Configuration and log in as system administrator.
2. Select the menu item *Setup > Recording Import* in the navigation bar.

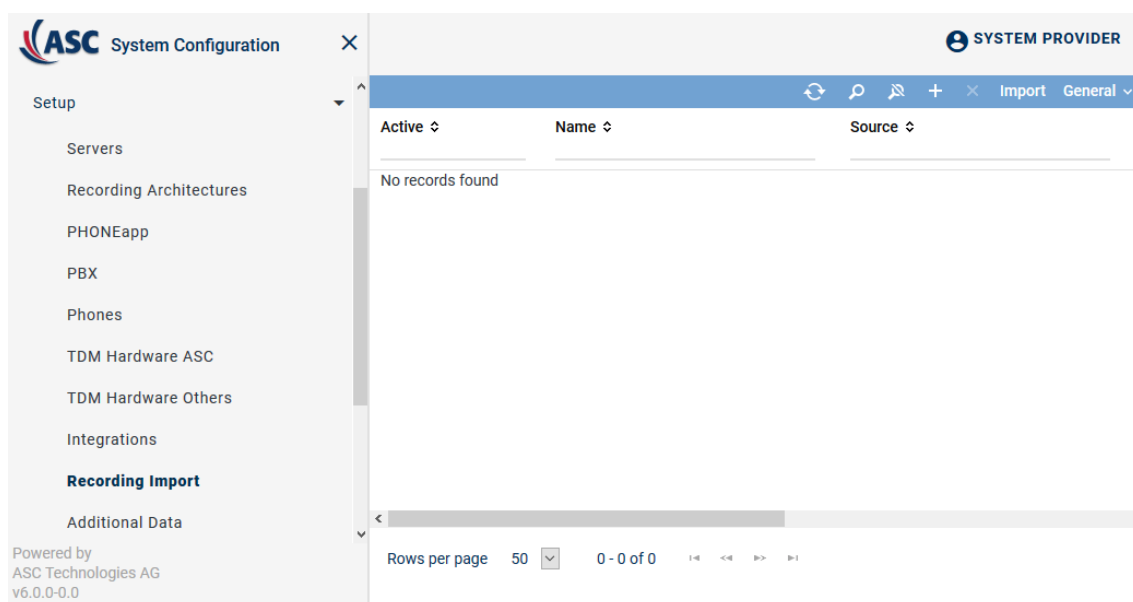



Fig. 48: Recording Import - main view

3. Click on the icon  (*Create*) in the toolbar of the main view.
4. Adjust all required settings in the tabs *Details*, *Drives*, and *Mapping* in the detail view. You can change tabs without buffering. The settings are not lost. Once you have adjusted all settings, save the configuration.

6.4.3.1

Tab Details

1. Select the tab *Details* to configure the job.

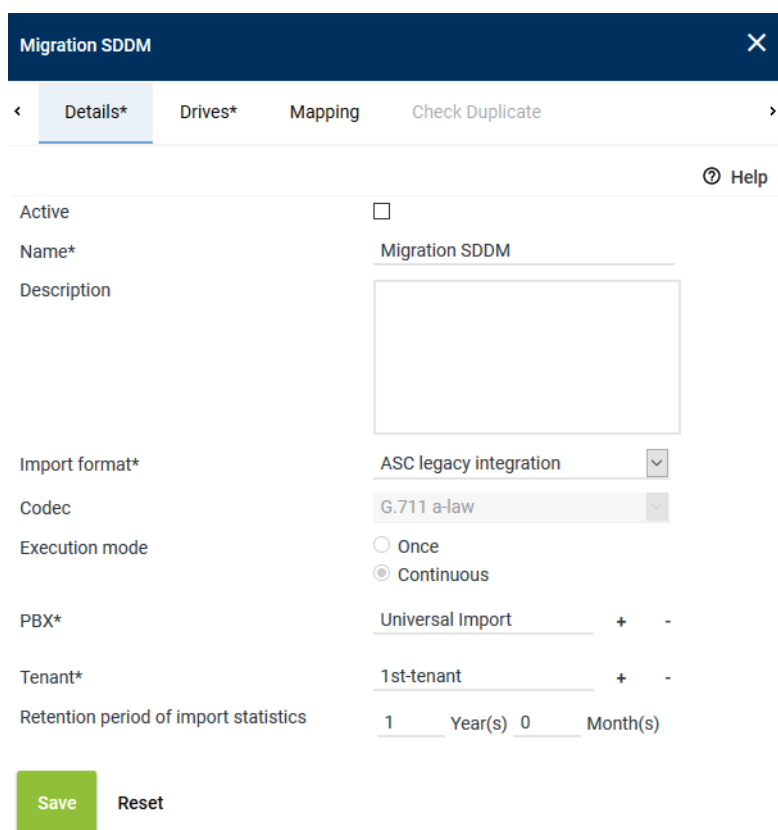




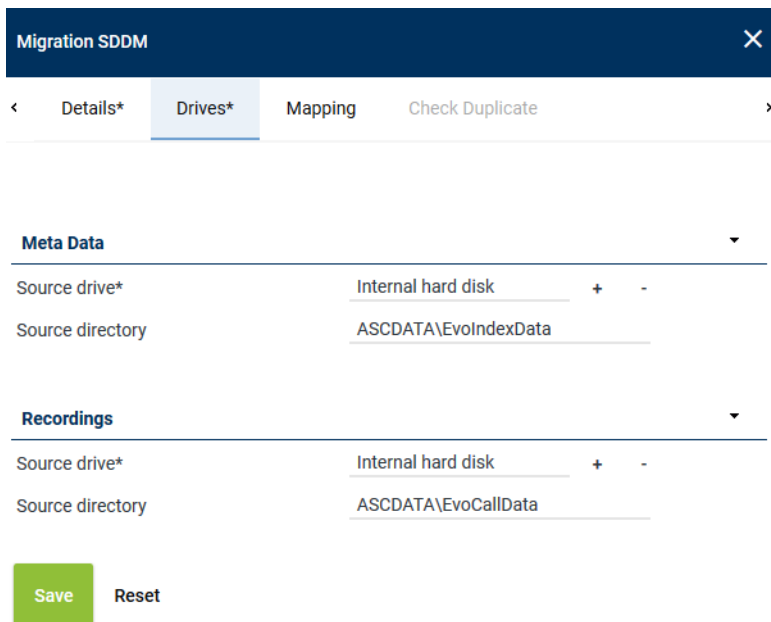
Fig. 49: Tab Details - Import from local hard disk

Active Tick the check box to activate the import job.

| | |
|--------------------------|---|
| | <input checked="" type="checkbox"/> = Job is active. <input type="checkbox"/> = Job is not active. |
| <i>Name</i> | Enter the name of the import job. |
| <i>Description</i> | Here, you can enter a description for import job. |
| <i>Import format</i> | Select the import format for the integration from the drop-down list: <ul style="list-style-type: none"> • ASC legacy integration With the import format ASC legacy integration all meta data and recordings are imported to the <i>neo</i> server. |
| <i>Codec</i> | This setting has been preselected and cannot be changed for this import format. |
| <i>Alternative codec</i> | This setting has been preselected and cannot be changed for this import format. |
| <i>Execution mode</i> | This import job is always executed continuously. This setting has been preselected and cannot be changed for this import format. |
| <i>PBX</i> | By clicking on the button  , select the PBX for which the data is supposed to be imported, see chapter "Assign PBX", p. 28 . 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. |
| <i>Tenant</i> | In a multi-tenant system, you have to run a separate import job for each tenant. Select which tenant the imported data is supposed to be mapped to. Click on the button  to select the tenant that you would like to map the imported data to, see chapter "Assign tenant", p. 29 . |

6.4.3.2 Tab Drives

1. Select the tab *Drives* to define the source drive.



The screenshot shows the 'Migration SDDM' window with the 'Drives' tab selected. The interface is divided into two main sections: 'Meta Data' and 'Recordings'. Each section has a 'Source drive*' field and a 'Source directory' field. In the 'Meta Data' section, the source drive is 'Internal hard disk' and the source directory is 'ASCDATA\EvoIndexData'. In the 'Recordings' section, the source drive is 'Internal hard disk' and the source directory is 'ASCDATA\EvoCallData'. At the bottom, there are 'Save' and 'Reset' buttons.

Fig. 50: Tab Drives - Configure drives for integration

Group field *Meta Data*:

| | |
|-------------------------|---|
| <i>Source drive</i> | Select the drive from which the additional data is supposed to be imported. See chapter "Assign drive", p. 29 . |
| <i>Source directory</i> | Enter the path to the directory <code>ASCDATA\EvoIndexData</code> from which the meta data is supposed to be imported. |

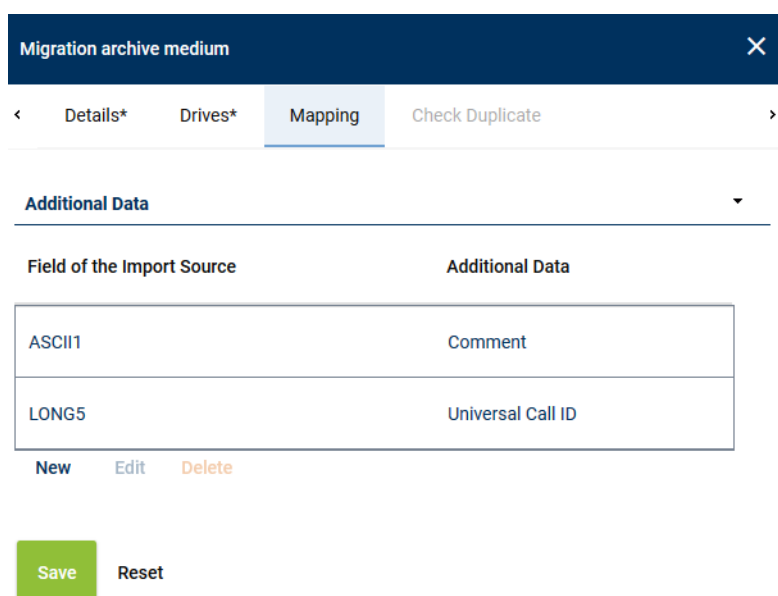
Group field *Recordings*:

| | |
|-------------------------|--|
| <i>Source drive</i> | <ul style="list-style-type: none"> When using the import format ASC legacy integration: Select the drive from which the audio data is supposed to be imported. See chapter "Assign drive", p. 29. |
| <i>Source directory</i> | <ul style="list-style-type: none"> When using the import format ASC legacy integration: Enter the path to the directory <code>ASCDATA\EvoCallData</code> from which the audio data is supposed to be imported. |

6.4.3.3 Tab Mapping

1. Select the tab *Mapping* to map the additional data.

In the group field *Additional Data*, you can define how additional data is supposed to be read out of the import source and mapped to the additional data types defined in the Additional Data module.



Migration archive medium

< Details* Drives* Mapping Check Duplicate >

Additional Data

| Field of the Import Source | Additional Data |
|----------------------------|-------------------|
| ASCII1 | Comment |
| LONG5 | Universal Call ID |

New Edit Delete

Save Reset

Fig. 51: Tab Mapping of the additional data (example)

| | |
|-----------------------------------|---|
| <i>Field of the Import Source</i> | Shows from which field of the import data set the information is read out. |
| <i>Additional Data</i> | Shows which additional data field (<i>CustomCP field</i>) the information has been mapped to. |

Tab. 12: Group field ASCII Mapping

6.4.3.3.1 Map additional data

1. In the group field *Additional Data*, click on the button *New* or *Edit*.
⇒ The following window appears:

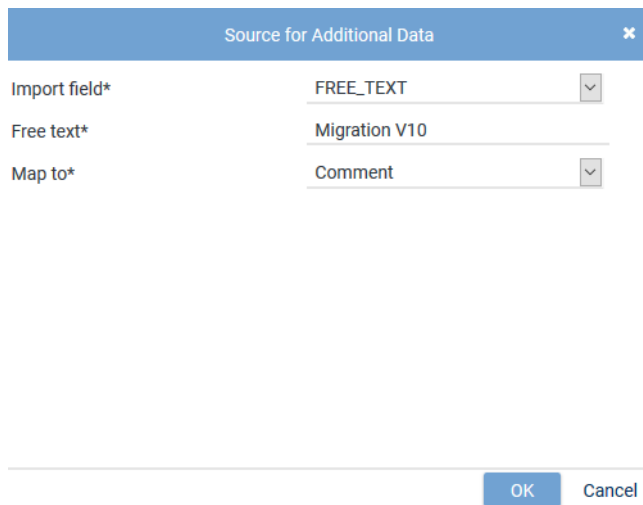


Fig. 52: Edit source for additional data (example for legacy import formats)

| | |
|---------------------|--|
| <i>Import field</i> | From the drop-down list, select the import field which is supposed to be read out of the import data set. Depending on the selected import job, different fields are available. See chapter "Map additional data", p. 9 . If you would like to add free text to the imported data, select the entry FREE_TEXT from the drop-down list. |
| <i>Free text</i> | If you have selected the entry FREE_TEXT in the import field, you must enter free text into the entry field. |
| <i>Map to</i> | From the drop-down list, select the additional data field that the information from the import field is supposed to be mapped to. Only additional data fields are displayed here which have previously been configured in the Additional Data module. |



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

2. In the detail view, click on the button *Save* to save the import job.
⇒ Upon activating the import job, the import starts.

6.5 Mixed types of migrations


If there is the need to migrate data from different sources, e. g. from a [NAS](#) drive, an online storage, and a local hard disk, it is possible that duplicate entries with references to their different original storage locations exist.

If you would like to use such a mixed type of migration but prefer to avoid duplicate entries, order a professional service from ASC.



To order a professional service, contact your local ASC support or call ASC support at +49 700 27278776.

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

CIFS

Common Internet File System stands for network share. The term was introduced by Microsoft in 1996 and describes an advanced version of SMB (Server Message Block). CIFS builds on NetBIOS over TCP/IP and SMB and, in addition to file and printer sharing, offers additional services such as Windows's RPC and NT domain service. Name resolution continues to be carried out via NBT broadcast message or in general via the NBT Name Service or via DNS if NBT is not available. (Source: Wikipedia 4th May 2017)

FQDN

Fully Qualified Domain Name

FTP

File Transfer Protocol: Network protocol for file transfer

IIS

Internet Information Services is an extensible web server created by Microsoft for use with the Windows NT family. IIS supports HTTP, HTTP/2, HTTPS, FTP, FTPS, SMTP and NNTP. It has been an integral part of the Windows NT family since Windows NT 4.0, though it may be absent from some editions (e.g. Windows XP Home edition), and is not active by default. (Source: Wikipedia 8th May 2018)

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

SDDM

Selective Data Distribution Management

SFTP

Secure File Transfer Protocol (SFTP) has been created for Secure Shell (SSH) as an alternative to the File Transfer Protocol (FTP) allowing encryption.

TTL

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

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.