

# System Configuration

## Archiving of recordings



## Administration manual

### for tenants

9/8/2020

### Product line neo, version 6.x

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

EVOIPneo

EVOLUTIONneo / XXL / eco

EVOflex (country-specific)

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## 2 Introduction



To be able to create archiving jobs, the function *Archiving* must have been activated on the server.

This manual describes how recorded data can be archived with the *neo* software.

To use this function, you can define individual jobs in the Archiving module of the application System Configuration which allow you to archive selected recordings in a target-oriented way (see [chapter "Create job configuration", p. 28](#)).

During archiving, the audio data and video data along with the corresponding additional data are copied to the archiving drives. On basis of the additional data you can search for recordings directly on the archiving drives.

In case of RDX and DVD-RAM drives, the database extracts of the audio files and video files are gathered during the termination of the medium and written onto the medium.

### ATTENTION!

#### Possible loss of data when archiving during trial period

Archiving jobs which are active in license-free operation (trial period) may be subject to loss of data if the archiving medium cannot be terminated since the trial period is over.

Make sure that the archiving job is finished before the trial period ends and that the archiving medium or the archiving volume is terminated in a timely manner.









During archiving, the recording system can create sub-archives (volumes) on the media. In the configuration of the drives in the Drives module, you can decide whether volumes are supposed to be created at all and according to which conditions.



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

All recordings which are supposed to be archived have to be available locally or on a storage expansion.

The recorded data can be conversations of different types:

| Description                                      | Icon  | Conversation type       | Recording format                  |
|--|---|-------------------------|-----------------------------------|
| Mere calls                                       |  | Call                    | Audio                             |
| Mere screen recording                            |  | Work item               | Screen video                      |
| Calls with screen recording                      |  | Call                    | Audio, screen video               |
| Calls with camera recording                      |  | Call                    | Audio, camera video               |
| Calls with screen recording and camera recording |  | Call                    | Audio, screen video, camera video |
| SMS  |  | <a href="#">SMS/SDS</a> | <a href="#">SMS/SDS text</a>      |
| SDS  |  | <a href="#">SMS/SDS</a> | <a href="#">SMS/SDS text</a>      |
| Chat messages                                    |  | Chat                    | Chat text                         |

Tab. 1: Conversation types

If an archiving job fails, you are informed about this at the following locations in the 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*.



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

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

Open the Archiving module by going to the menu item *Conversations* in the navigation bar and clicking on the sub-menu item *Archiving*.

### 3 Supported file systems

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

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



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












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

For larger media use NTFS or exFAT.

## 4

## Main view








In the main view, all saved job configurations are displayed.

| Status  | Active  | Job Name              | Type           | Execution   | Start Time            | End Time              |
|---|---|-----------------------|----------------|---|-----------------------|-----------------------|
|  |  | Archivierung parallel | Bulk job       |  | 11/23/2018 2:52:38 PM |                       |
|  |  | Bulk Archivierung     | Rule-based job |  | 11/23/2018 2:25:14 PM | 11/23/2018 2:25:14 PM |
|  |  | Bulk Archivierung     | Bulk job       |  | 11/23/2018 2:25:14 PM |                       |

Rows per page 50 1 - 3 of 3

Fig. 1: Archiving - main view

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

|                      |   |
|----------------------|---|
| <b>Status</b>        | Shows the editing status of the job configuration.<br> = Job configuration has been released.<br> = Job configuration is a draft.<br> = Job configuration has been deactivated. |
| <b>Active</b>        | Shows whether an archiving job is active.<br> = Job is active.<br> = Job is not active.   |
| <b>Job Name</b>      | Name of the job configuration.  |
| <b>Type</b>          | Shows whether the archiving job is a <i>bulk job</i> or a <i>rule-based job</i> .   |
| <b>Execution</b>     | Shows whether the archiving job is executed regularly or only once.<br> = Job is executed regularly.<br> = Job is executed once. (This execution type is temporarily unavailable.)  |
| <b>Start Time</b>    | Shows when the archiving job starts.  |
| <b>End Time</b>      | Shows when the archiving job ends.  |
| <b>Version</b>       | Version number of the job configuration.  |
| <b>Archive ID</b>    | ID of the archive of the job as <a href="#">UUID</a> .  |
| <b>Based On</b>      | Job configuration from which the job configuration has been copied or cloned.   |
| <b>Creation Date</b> | Date on which the job configuration was created.  |
| <b>Updated</b>       | Date on which the job configuration was updated for the last time.  |

## 4.1






## Toolbar

The toolbar offers the following functions.



Fig. 2: Toolbar



|   |  |   |
|---|--|---|
|  | <i>Search</i>  | Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see <a href="#">chapter "Search", p. 9</a> . The icon  is displayed whenever the search has been adjusted by means of a filter. |
|  | <i>Reset search</i>  | Resets all manually entered search criteria.  |
|  | <i>Create</i>  | Creates a new job configuration, a new version of an existing configuration or a clone of an existing configuration, see <a href="#">chapter "Create job configuration", p. 28</a> .  |
|   | <i>Add New Period for Version</i>                                  | Activates the group field <i>Consider Recordings Once</i> in the detail view where you can define a period of time to archive all conversations once again which have been recorded during this period.<br><br><b>NOTICE!</b> This menu item is only available to be used on the basis of a released job.   |
|  | <i>Delete</i>  | Deletes the selected job configuration.<br><br>You can only delete job configurations with the status <i>Draft</i> or <i>Deactivated</i> .  |
| <i>Archiving</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.<br><br>You can continue the job by clicking on the menu item <i>Start</i> .  |
|   | <i>Activate Deletion for Configuration (Action is Irrevocable)</i> | Activates the deletion of the configuration of the archive. Once the configured <b>TTL</b> has expired, the archive is deleted. <b>WARNING!</b> This action cannot be undone!<br><br>If you would like to delete the archive after the <b>TTL</b> has expired, confirm the security prompt.   |
|   | <i>General</i>   |   |
|   | <i>Print</i>   | Prints the table of the main view.  |
|   | <i>Adjust Table</i>  | Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> <li>• Displayed information</li> <li>• Order of the displayed columns</li> <li>• Number of rows per page</li> </ul>   |
|   | <i>Save Table Configuration</i>                                    | Saves the current table configuration of the main view as default view of the user.   |
|   | <i>General Help</i>  | Opens the online help.  |
|   | <i>Module Help</i>   | Opens the module-specific online help.  |





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

### See also

 [Search](#) [► 9]

#### 4.1.1 Search

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

1. In the toolbar, click on the icon  or  (*Search*).

⇒ The window *Search Criteria* appears.

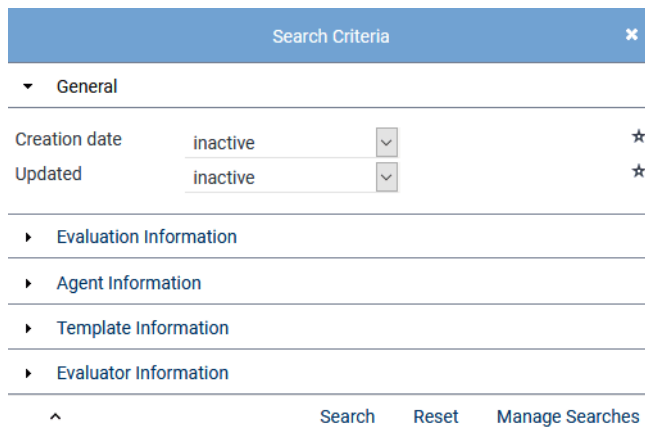





Fig. 3: Window Search Criteria (example)

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

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

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

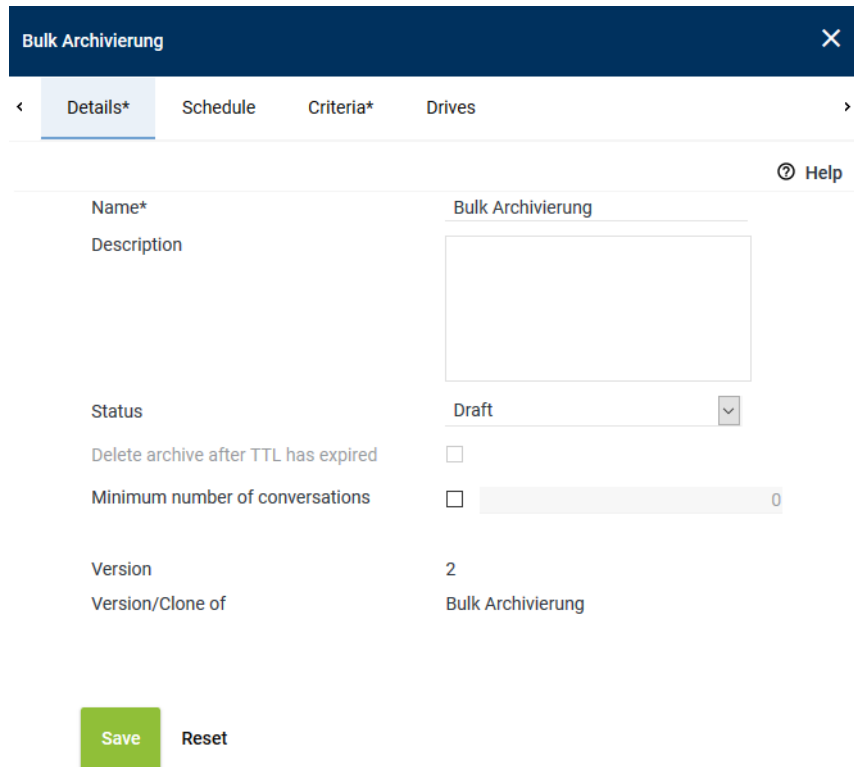


A detailed description of the search function can be found in the user manual *System Configuration - General information*.

## 5

## Detail view

The detail view contains additional information about as well as functions of the selected job configuration.



The screenshot shows the 'Bulk Archivierung' (Bulk Archiving) configuration window. It has a dark blue header with the title and a close button. Below the header is a tab bar with four tabs: 'Details\*' (selected), 'Schedule', 'Criteria\*', and 'Drives'. A 'Help' icon is visible on the right. The main area is divided into two columns. The left column contains labels for 'Name\*', 'Description', 'Status', 'Delete archive after TTL has expired', 'Minimum number of conversations', 'Version', and 'Version/Clone of'. The right column contains the corresponding values: 'Bulk Archivierung', a large empty text box for the description, 'Draft' (with a dropdown arrow), an unchecked checkbox for TTL, an unchecked checkbox for minimum conversations with a value of '0', '2' for the version, and 'Bulk Archivierung' for the clone of. At the bottom left are 'Save' and 'Reset' buttons.

Fig. 4: Archiving - detail view

The detail view consists of the following tabs:

- **Details**  
Here, you can display and edit detailed information about the selected job configuration.  
See [chapter "Tab Details", p. 11.](#)
- **Criteria**  
Here, you can display and edit different criteria for the selected job configuration.  
See [chapter "Tab Criteria", p. 15.](#)
- **Drives**  
Here, you can display and select the archiving mode and the archiving drives.  
See [chapter "Tab Drives", p. 25.](#)
- **Schedule**  
Here, you can display and edit the settings of the schedule.  
See [chapter "Tab Schedule", p. 13.](#)

## 5.1

## Tab Details

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

<

Details\*

Schedule

Criteria\*

Drives

>

Help

Name\*

Bulk Archivierung

Description

Status

Draft

Delete archive after TTL has expired

☐

Minimum number of conversations

☐ 0

Version

2

Version/Clone of

Bulk Archivierung

Fig. 5: Tab Details

|   |   |
|---|---|
| <b>Name</b>                                 | Enter the name of the job configuration.  |
| <b>Description</b>                          | Here, you can enter a description for the job configuration.  |
| <b>Status</b>                               | <p>Shows the processing status of the job configuration.</p> <p>Select the status of the job configuration. Possible options:</p> <ul style="list-style-type: none"> <li>• <b>Draft</b><br/>Select this status if you would like to be able to continue editing the job configuration.</li> <li>• <b>Released</b><br/>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.<br/>A released job configuration cannot be edited anymore.</li> <li>• <b>Deactivated</b><br/>(Precondition: job configuration has been released)<br/>Select this status to deactivate the job configuration and thus the job.<br/>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.</li> </ul> |
| <b>Delete archive after TTL has expired</b> | <p>Shows whether the archive is deleted once the configured <b>TTL</b> has expired.</p> <p>Activate the deletion for the configuration of the archive by means of the function <i>Activate Deletion for Configuration (Action is Irrevocable)</i> in the toolbar of the main view.</p>  |
| <b>Minimum number of conversations</b>      | <p>Define whether the number of conversations entered in the corresponding entry field has to be available before executing the archiving job. Only conversations are considered which meet the criteria of the job.</p> <p><input checked="" type="checkbox"/> = Entered number of conversations is considered.</p> <p><input type="checkbox"/> = Entered number of conversations is ignored.</p>  |

|                  |   |
|------------------|---|
|                  | If a minimum number of conversations is considered but the number has not been reached on the start date, the archiving job skips one archiving interval. If this is a job which is supposed to be executed only once, this job is not executed at all. If this is a job which is repeated periodically, it will check whether the number has been reached upon the start of the next archiving interval. |
| Version          | Version number of the job configuration.  |
| Version/Clone of | Job configuration from which the job configuration has been copied or cloned.   |

## 5.2

### Tab Schedule

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

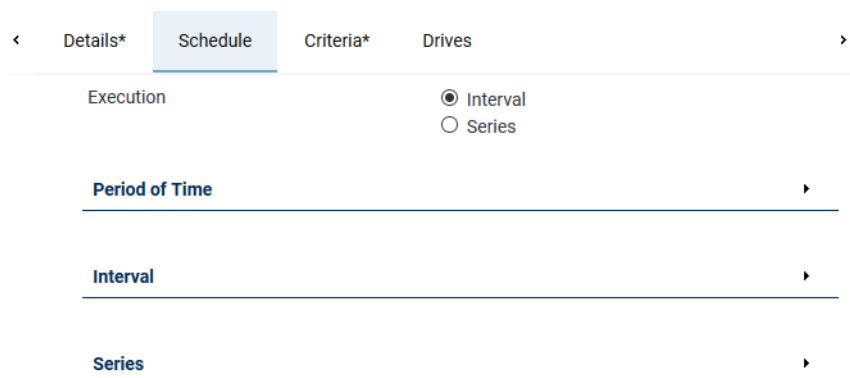


Fig. 6: Tab Schedule

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

### 5.2.1

#### Group field Period of Time

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

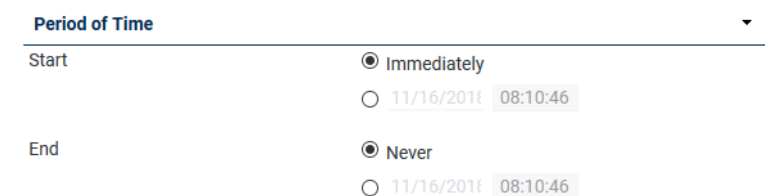




Fig. 7: Schedule - Period of Time

|              |  |
|--------------|--|
| <b>Start</b> | <ul style="list-style-type: none"> <li>• <i>Immediately</i><br/>The job is started immediately.</li> <li>• Entered date</li> </ul> |
|--------------|--|

|            |  |
|------------|--|
|            | 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  .  |
| <i>End</i> | <ul style="list-style-type: none"> <li>• <i>Never</i><br/>The job never ends.</li> <li>• <i>Entered date</i><br/>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 .</li> </ul> |

### 5.2.2 Group field Interval

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

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

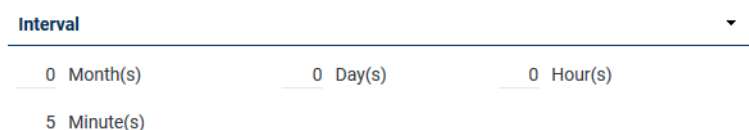


Fig. 8: Schedule - Interval

### 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.

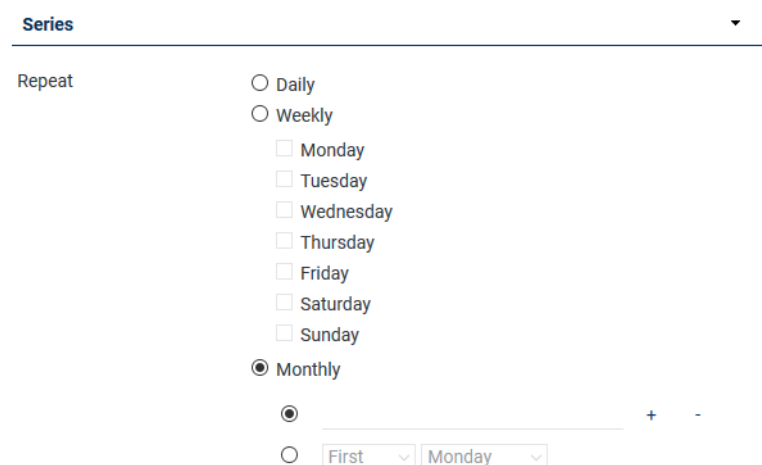


Fig. 9: Schedule - Series

|               |  |
|---------------|--|
| <i>Repeat</i> | <p>Days on which the job is supposed to be executed.</p> <p><i>Daily</i> = The job is repeated daily at the entered time.</p> <p><i>Weekly</i> = The job is repeated on the selected days at the entered time. You can select one or several weekdays.</p> <p><i>Monthly</i> = The job is repeated on the selected days at the entered time. You can either select particular dates or certain days. See <a href="#">chapter "Configure monthly repetition on fixed dates", p. 15</a> and <a href="#">chapter "Configure monthly repetition on fixed days", p. 14</a>.</p> |
|---------------|--|

#### 5.2.3.1 Configure monthly repetition on fixed days

1. Select the lower option:

☒ Monthly  
☐ \_\_\_\_\_ + -  
☒ First Monday

Fig. 10: Configure fixed days

- 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

- Select the upper option:

☒ Monthly  
☐ \_\_\_\_\_ + -  
☐ First Monday

Fig. 11: Configure fixed dates

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

Selected days

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

\_\_\_\_\_ + -

Fig. 12: Select dates

- 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.
- Click on a spot outside the calendar to apply the selected dates and close the calendar.
- 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.
- 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

☐ Bulk job
☒ Rule-based job

Conversation Types

Dependencies

Consider Recordings

Consider Recordings Once

Agents

Conversation Direction

Duration

Calling Party Phone Number

Called Party Phone Number

Additional Data

Save
Reset

Fig. 13: Tab Criteria



For jobs of the type *Bulk* you can only define criteria in the group field *Consider Recordings*. All other group fields are only available for rule-based jobs.

### General

|             |  |
|-------------|--|
| <i>Type</i> | <p>Define whether the job is supposed to be rule-based or a bulk job.</p> <ul style="list-style-type: none"> <li><i>Bulk job</i><br/>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.</li> <li><i>Rule-based job</i><br/>The job type <i>rule-based</i> enables the selection of recordings according to rules defined by the user. You can define several criteria in the different group fields for the rule creation.</li> </ul> |
|-------------|--|

#### 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* | <input checked="" type="checkbox"/> Call<br><input type="checkbox"/> without screen recording<br><input checked="" type="checkbox"/> without video recording<br><input type="checkbox"/> Work item<br><input type="checkbox"/> Text message<br><input type="checkbox"/> Chat |

Fig. 14: 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 Dependencies

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

| Dependencies                                |   |
|---|---|
| Archive even if only meta data is available | <input type="checkbox"/>  |
| Archive also without compression            | <input type="checkbox"/> 0 Day(s)<br><input type="checkbox"/> 0 Hour(s)<br><input type="checkbox"/> 0 Minute(s) |
| Delay                                       | <input type="checkbox"/> Day(s)<br><input type="checkbox"/> Hour(s)<br><input type="checkbox"/> Minute(s)       |

Fig. 15: Group field Dependencies

*Archive even if only meta data is available* ☒ = Even recordings of which only meta data is available are archived.

|   |   |
|---|---|
|   | <input type="checkbox"/> = Recordings of which only meta data is available are not archived.<br><input checked="" type="checkbox"/> = Even uncompressed recordings are archived.<br><input type="checkbox"/> = Only compressed recordings are archived.<br>Enter the delay time for archiving uncompressed recordings in the entry fields <i>Day(s)</i> , <i>Hour(s)</i> , <i>Minute(s)</i> .<br>Example:<br>Activate the option and enter 3 <i>Day(s)</i> . Result: Each new recording which has not been compressed after 3 days is archived after these 3 days anyway. |
| <i>Archive also without compression</i> |   |
| <i>Delay</i>                            | <input checked="" type="checkbox"/> = Recordings are archived with delay.<br><input type="checkbox"/> = Recordings are archived immediately.<br>Enter the delay time for archiving recordings in the entry fields <i>Day(s)</i> , <i>Hour(s)</i> , <i>Minute(s)</i> .<br>Example:<br>Activate the option and enter 3 <i>Day(s)</i> . Result: New recordings are only recorded after 3 days.   |



**NOTICE!** The second option is only relevant if post compression of the recorded recordings has been activated.

### 5.3.3

#### 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. 16: Criteria - Consider recordings

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

### 5.3.4

#### Group field Consider Recordings Once

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



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

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

Consider Recordings Once

From

07/13/2020

07:58:04

To



07/14/2020

07:58:04

Data source

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

Fig. 17: Criteria - Consider Recordings Once

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

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

**Consider Recordings Once** ▼

---

From 07/13/2020 08:04:57

To 07/14/2020 08:04:57

Data source

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

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

Fig. 18: Criteria - table with information about completed job

### 5.3.5 Group field Agents

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

**Agents** ▼

☒ Activated



+

-


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

Fig. 19: Criteria - Agents

|                  |  |
|------------------|--|
| <b>Activated</b> | <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. |

|   |               |   |
|---|---------------|---|
|  | <b>Add</b>    | Opens a window in which you can select and add agents (see <a href="#">chapter "Add agent", p. 20</a> ).  |
|  | <b>Remove</b> | Removes the selected agent from the list (see <a href="#">chapter "Delete agent assignment", p. 21</a> ). |

#### 5.3.5.1 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. 20: 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       |              |                 |                 |

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Add Cancel

Fig. 21: 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*.

### 5.3.5.2

#### Delete agent assignment


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

**Agents** ▼

☒ Activated

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

Fig. 22: 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*).

### 5.3.6 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<br><input checked="" type="checkbox"/> Outbound<br><input checked="" type="checkbox"/> Internal<br><input checked="" type="checkbox"/> Unknown |

Fig. 23: Criteria - Conversation direction

|                  |  |
|------------------|--|
| <b>Activated</b> | <input checked="" type="checkbox"/> = Only conversations of the selected directions are considered.<br><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.   |

### 5.3.7 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)<br/> <input type="text" value="45"/> Minute(s)<br/> <input type="text" value="0"/> Second(s)         </div> |
| max. ( $\leq$ ) | <input checked="" type="checkbox"/> <div> <input type="text" value="2"/> Hour(s)<br/> <input type="text" value="0"/> Minute(s)<br/> <input type="text" value="0"/> Second(s)         </div>  |

Fig. 24: Criteria - Duration

|                                 |   |
|---------------------------------|---|
| <b>min. (<math>\geq</math>)</b> | Threshold value for the minimum duration of conversations which are supposed to be considered.<br><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.<br><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.   |
| <b>max. (<math>\leq</math>)</b> | Threshold value for the maximum duration of conversations which are supposed to be considered.<br><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.<br><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.

### 5.3.8 Group field Calling Party Phone Number

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

**Calling Party Phone Number** ▼

☐ Activated

| Calling Party Phone Number | Edit  |
|----------------------------|---|
| 0602150010                 |  |
| 0602150012222              |  |
| 060215013333               |  |

**Add** **Delete**


Fig. 25: 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

|   |   |
|---|---|
| <b>Add</b>  | Adds a new entry to the list.<br>Open the new entry ( <i>New Value</i> ) to enter a new phone number, see <a href="#">chapter "Edit entry", p. 23</a> . |
| <b>Delete</b>   | Deletes the selected phone number from the list.  |
|  | Opens the selected phone number for editing, see <a href="#">chapter "Edit entry", p. 23</a> .  |



#### 5.3.8.1 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. 26: 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*).

### 5.3.9 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. 27: 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

|   |   |
|---|---|
| <a href="#">Add</a>   | Adds a new entry to the list.<br>Open the new entry ( <i>New Value</i> ) to enter a new phone number, see <a href="#">chapter "Edit entry", p. 23</a> . |
| <a href="#">Delete</a>  | Deletes the selected phone number from the list.  |
|  | Opens the selected phone number for editing, see <a href="#">chapter "Edit entry", p. 23</a> .  |

### 5.3.10 Group field Additional Data

Define whether only the conversations with certain additional data are supposed to be considered.

**Additional Data** ▼

☒ Activated




| Arbitrary assignment |                    | +   |
|----------------------|--------------------|---|
| <input type="text"/> | Kommentar ▼        |  |
| <input type="text"/> | Please select... ▼ |  |

Fig. 28: Criteria - Additional Data

**Activated**

☒ = Only conversations with the assigned additional data are considered.

☐ = Conversations with all additional data are considered. The list of additional data is ignored.

1. To add additional data to the list, click on the icon  (*Create*).
2. Select an additional date from the drop-down list. **NOTICE!** Customer-specific additional data which are supposed to be available here must be configured in the Additional Data module.
3. In the entry field, enter a value which is supposed to serve as filter criterion.



4. If you would like to delete an entered additional date from the list, click on the icon .

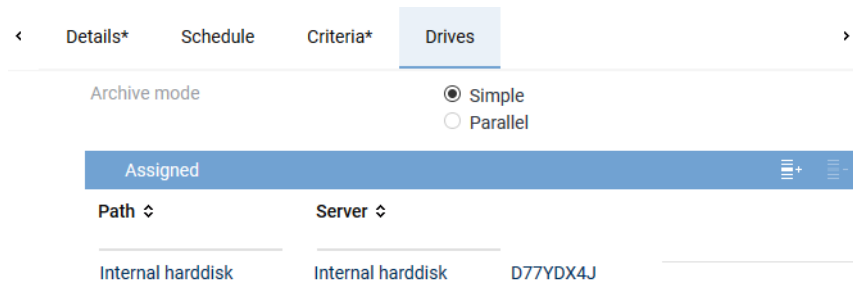


For information about the configuration of additional data refer to the administration manual for system providers *Additional Data module*

## 5.4

### Tab Drives

Here, you can display and select the archiving mode and the archiving drives.



| Assigned          |                            |
|-------------------|----------------------------|
| Path              | Server                     |
| Internal harddisk | Internal harddisk D77YDX4J |

Fig. 29: Tab Drives

Archiving jobs can be executed in 2 different modes. The archiving mode defines the procedure, when writing on the archiving drives.

- *Simple*

The data is archived on exactly 1 drive until it is full. After that, the next drive is used. If no additional drive can be found, the current medium is used according to the settings of the write protection in the Drives module.

The following possibilities are available:

- The medium may not be overwritten:

The current job is not executed anymore.

- The medium may be overwritten after a certain period of time:

If the current job accesses the drive after the entered time has expired, then the medium is formatted and can be overwritten. If the current job accesses the drive earlier, the current job is not executed anymore.

- The medium has no write protection:

The medium is formatted and the data of the current job is written on it as soon as the current job accesses the drive.

- *Parallel*

The data is archived on 2 drives in parallel. The assigned drives are always used in pairs. For that, the drives are grouped in pairs in the list from top to bottom (see Fig. 30, p. 26). All assigned drives have to be connected to the same computer. Network drives are not supported.

The data is saved on the 1st pair of drives until at least one of both drives is full. After that, the next pair of drives in the list is used. If no additional pair of drives can be found, the current media are used according to the settings of the write protection in the Drives module.

The following possibilities are available:

- At least one of the media may not be overwritten:

The current job is not executed anymore.

- One medium has no write protection; the other medium may be overwritten after a certain period of time:

If the current job accesses the pair of drives after the time entered for the 2nd medium has expired, then both media are formatted and can be overwritten with data from the current job. If the current job accesses the pair of drives earlier, the current job is not executed anymore.

- Both media may be overwritten after a certain period of time:

If the current job accesses the pair of drives after the time entered for both media has expired, then both media are formatted and can be overwritten with data from the current job. If the current job accesses the pair of drives earlier, i. e. for at least 1 medium the entered time has not yet expired, then the current job is not executed anymore.

- Both media have no write protection:

The media are formatted and the data of the current job is written on it as soon as the current job accesses the pair of drives.



Cascading archiving is only possible on removable media. When using 2 **NAS** drives, cascading archiving is **not** possible. I. e. a **NAS** drive either offers enough capacity for archiving on it permanently or the archiving job must be mapped manually to another **NAS** drive if one **NAS** drive is full (refer to administration manual for tenants *Drives module*, tab *Volumes*).



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

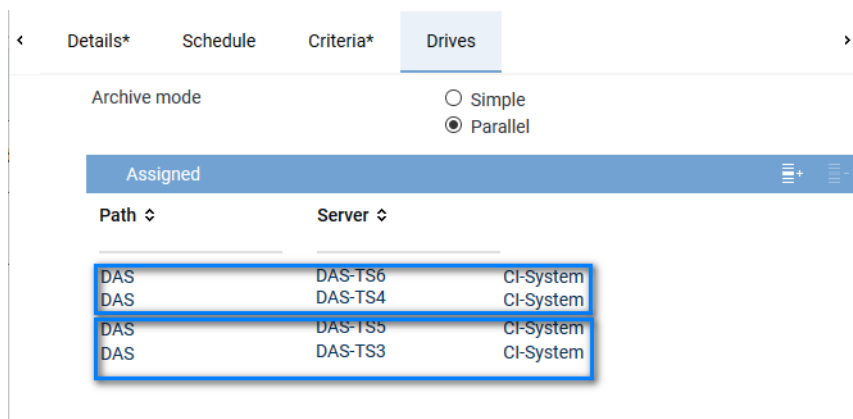


Fig. 30: Parallel archiving mode - utilization of the drives in pairs





For optimum archiving conditions and a smooth archiving process, the following conditions have to be fulfilled for parallel archiving:

- The two drives of a pair of drives have to have the same capacities.
- Configure the properties of the write protection of the two drives of the pair of drives equally.

|                       |   |
|-----------------------|---|
| <b>Archiving mode</b> | Define whether the archiving is supposed to be executed on one or on several drives.<br><br><i>Simple</i> = The data is archived on exactly 1 drive.<br><i>Parallel</i> = The data is archived on 2 drives in parallel. |
|-----------------------|---|

Add 1 or more archiving drives according to the selected archiving mode:

|   |               |   |
|---|---------------|---|
|  | <b>Add</b>    | Opens a window in which you can select and add drives, see <a href="#">chapter "Add drive", p. 27</a> . |
|  | <b>Remove</b> | Removes the selected drive from the list.   |

If you add more drives than required for the archiving mode, the drives are used in the sequence of the list from top to bottom. This means that if the first drive is full, the second one is used. If the second drive is full, the third one is used and so on.




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.

#### 5.4.1

#### Add drive

1. Select the tab *Drives*.
2. To assign a drive, click on the icon  (*Add*).

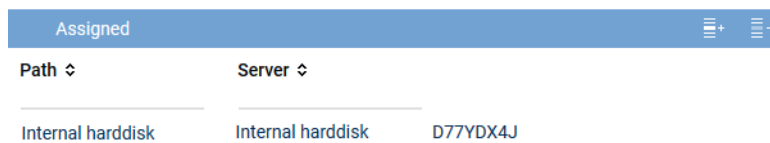


Fig. 31: Drives - Add target drive

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

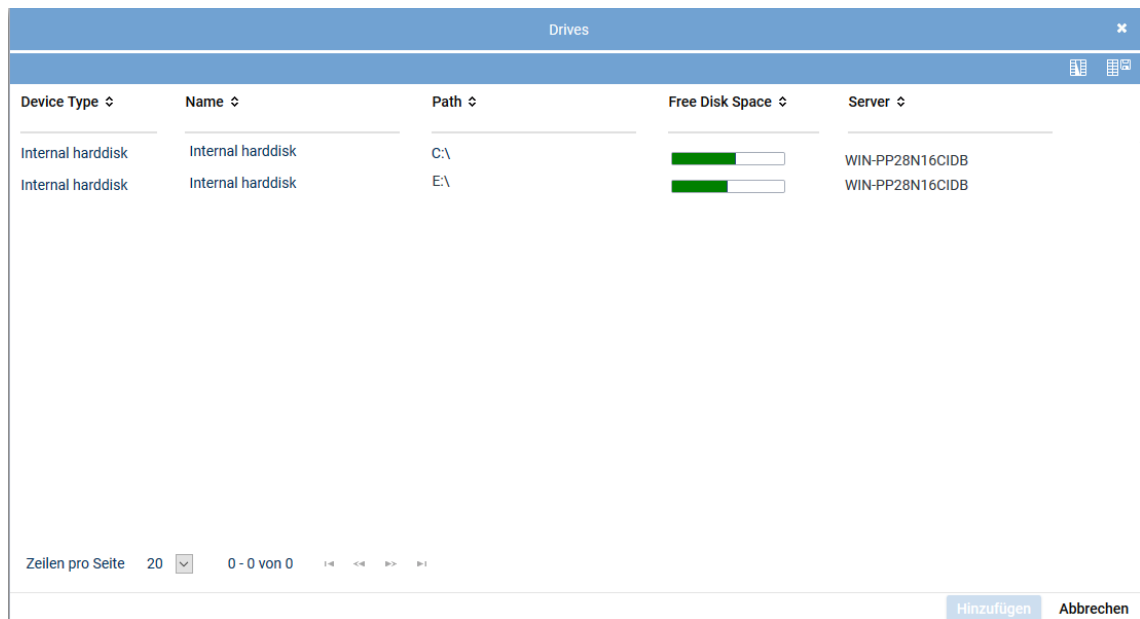


Fig. 32: Drives - Select drive

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

## 6


## Create job configuration



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



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

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

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

3. Adjust all necessary settings within the 4 tabs.  
You can change tabs without buffering without risking the loss of your settings.
  - *Details*, see [chapter "Tab Details"](#), p. 11
  - *Criteria*, see [chapter "Tab Criteria"](#), p. 15
  - *Drives*, see [chapter "Tab Drives"](#), p. 25
  - *Schedule*, see [chapter "Tab Schedule"](#), p. 13
4. 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.

### 7 Edit job configuration

1. In the main view, select the job configuration you would like to edit.
  - ⇒ All settings for the selected job configuration are displayed in the detail view.
2. Adjust all necessary settings within the 4 tabs.

You can change tabs without buffering without risking the loss of your settings.

  - *Details*, see [chapter "Tab Details", p. 11](#)
  - *Criteria*, see [chapter "Tab Criteria", p. 15](#)
  - *Drives*, see [chapter "Tab Drives", p. 25](#)
  - *Schedule*, see [chapter "Tab Schedule", p. 13](#)
3. To save the settings, click on the button *Save*.

To reset all settings or changes in all tabs, click on the button *Reset*.  
To cancel the editing of the job configuration, click on the main view and confirm the security prompt.



---

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

---

### 8 Start archiving job

Every archiving job is automatically started at the point in time defined in the schedule (see [chapter "Tab Schedule", p. 13](#)).

---

If an archiving job fails, you are informed about this at the following locations in the system:



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

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



---

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



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

## 9 Stop archiving job

---

### 9 Stop archiving job

Every archiving job is automatically stopped at the point in time defined in the schedule (see [chapter "Tab Schedule", p. 13](#)).

As soon as the archiving job is finished, the job configuration receives the status *Deactivated*.

To finish an archiving job outside of the schedule, you have to set the job configuration to the status *Deactivated* manually (see [chapter "Tab Details", p. 11](#)).

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## Glossary

### ASCFS

---

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

### 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)

### SDS

---

Short Data Service (TETRA), text message

### SMS

---

Short Message Service, text message (GSM, landline)

### TTL

---

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

### UUID

---

Universally Unique Identifier is an identifier standard which makes it possible to unambiguously identify information in distributed systems without central coordination.