

# System Configuration

## Import of configuration data



## Administration manual

### for system providers and tenants

1/26/2021

### 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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## General information

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## 2 Introduction

This manual describes how configuration data which has been stored and is administered outside the system can be imported into the recording system.

The import takes place in the Configuration Import module of the application System Configuration.



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Some data types can be migrated from version 10 recording systems. For information about migration data and requirements refer to the administration manual *Migration*.

---

To map external data to the data structures of the neo system, you need a corresponding **XSLT** file. Via the XSLT Management module, you can load **XSLT** files into the neo system, edit them, and map them to the different data types.



For information about the XSLT Management module refer to the administration manual *XSLT management*.

In the Configuration Import module, you can define import sources and import jobs which allows you to import configuration data into the recording system.

For the import of results of Call Director customer surveys further preconditions have to be met, see [chapter "Call Director customer surveys", p. 42](#).

## 3 Supported import formats

In general, the following data can be imported:

Import object types	Possible import sources					
	User	CSV	LDAP	XML	SFTP	Ext. DB
Employees of Tnt	Tnt	X	X	X	-	-
Employees of SP	SP	X	X	X	-	-
Organization structures	Tnt	X	X	X	-	-
Evaluation templates	Tnt	-	-	X	-	-
Evaluations	Tnt	-	-	X	-	-
Call Director Customer Surveys	Tnt	-	-	X	-	-
Phones	SP	X	-	X	-	-

Import object types	Possible import sources					
	User	CSV	LDAP	XML	SFTP	Ext. DB
Recording check mechanism	SP	-	-	-	X	X
Recording check mechanism	Tnt	-	-	-	X	X

The following import functions can be found in this manual:

- *Data for the Recording Check Mechanism*
- *Data of evaluation templates*
- *Data of evaluations*
- *Data on Call Director customer surveys*

For information about the other import functions refer to the following manuals:

- *Import of user data*  
This manual is relevant for system providers and tenants alike as both of them have the possibility to import their own type of employees. Refer to administration manual *Import of user data*.
- *Import of phone configurations*  
This manual describes how to import phone configurations in [XML](#) or [CSV](#) format. Refer to administration manual for system providers *Import of phone configurations*.

## 4 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*

### 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

### XSLT files for the import of phone configurations

**NOTICE!** These XSLT files serve as an example only. They have to be adapted to the individual structure of the respective import file.

- *PhoneCloneRegProb.xslt*

Can be used for the import object type: *phone*

Purpose of use: import of phone configurations from an XML file which only contains the mandatory fields for a phone configuration.

- *PhoneSimple.xslt*

Can be used for the import object type: *phone*

Purpose of use: import of phone configurations from an CSV file which only contains the mandatory fields for a phone configuration.

- *IPPhoneWithPhoneNumberInsteadOfExtension.xslt*

Can be used for the import object type: *phone*

Purpose of use: import of phone configurations from an XML file which in addition to the mandatory fields for a phone configuration contains information for the IP phones.

### Additional XSLT files

- *Identity.xslt*

Can be used for all import object types

Purpose of use: import of data which do not require a conversion

- *Call\_Director\_CUSTOMCP01.xslt*

Can be used for the import object type: *Call Director customer survey*

Purpose of use: import of results of Call Director customer surveys

**NOTICE!** This XSLT file serves as a template example only. It has to be adjusted individually for each Call Director customer survey, see [chapter "Call Director customer surveys", p. 42](#).

- *XSLTForLDAP\_ActiveDirectory.xslt*

Can be used for the import object type: *employees*

Purpose of use: import of employee data from an Active Directory via LDAP

**NOTICE!** This XSLT file serves as a template example only. It has to be adjusted to meet the customer-specific structure of the Active Directory.

- *XSLTForLDAP\_ActiveDirectory\_Orga\_Unit.xslt*

Can be used for the import object type: *organization structures*

Purpose of use: import of organization structures from an Active Directory via [LDAP](#)

**NOTICE!** This XSLT file serves as a template example only. It has to be adjusted to meet the customer-specific structure of the Active Directory.

#### XSLT files for the import for the Recording Check Mechanism

- *Cisco.xslt*

Can be used for the import object type: *Cisco CDR data*

Purpose: Import of Cisco CDR log files to compare the conducted conversations with the saved recordings.

- *SfB.xslt*

Can be used for the import object type: *SfB session data*

Purpose: Import of session data of Microsoft Skype for Business to compare the conducted conversations with the saved recordings.



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



For information about the XSLT Management module refer to the administration manual *XSLT management*.



## 5

## Main view

1. Select the menu item *More > Configuration Import* in the navigation bar.

When importing configuration data, you have to differentiate between import sources and their corresponding import configurations (import jobs). Therefore, the main view is organized in a tree structure.

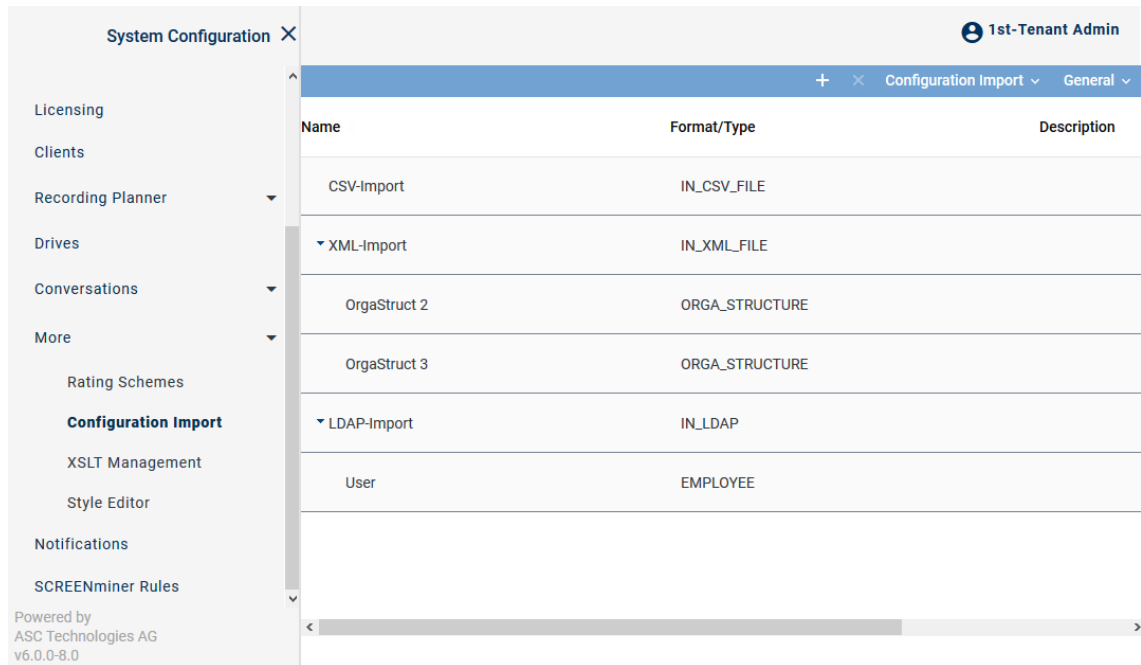


Fig. 1: Configuration import - main view

The following information is displayed in the main view:

<b>Name</b>	Name of the import source or import job.
<b>Format/Type</b>	Shows the format or type of the imported configuration data.
<b>Description</b>	Shows the description of the import source or import job.



By clicking on the icons ▶ or ▼ in front of an import source, you can show or hide the import jobs which have been created for this import source.

## 5.1

## Toolbar Configuration Import model

The toolbar offers the following functions.

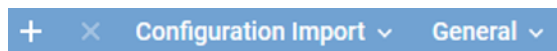


Fig. 2: Configuration import - toolbar

<b>+</b>	<b>Create</b>	Create a new element. The following possibilities are available: <ul style="list-style-type: none"> <li>• CSV</li> <li>• XML</li> <li>• LDAP</li> <li>• SFTP for Recording Check feature</li> <li>• External database for Recording Check feature</li> </ul>
<b>x</b>	<b>Delete</b>	Deletes the selected element upon confirming the security prompt.

### Configuration Import

<i>Create New Import Configuration</i>	Creates a new import configuration for the selected import source.
<i>Start Job</i>	Starts the selected import job.

### General

<i>General Help</i>	By clicking on the menu item General Help, a description of the application you are currently viewing is opened.
<i>Module Help</i>	By clicking on the menu item Module Help, a description of the module you are currently viewing is opened.



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

## 6 Detail view

All settings for the selected import source or import job are displayed in the detail view. The content of the detail view depends on whether you edit an import source or an import job.

The following import functions are described in this manual:

- *Recording Check Mechanism*
  - *Cisco CDR data via SFTP*  
see [chapter "Recording Check Mechanism for Cisco"](#), p. 11
  - *SfB session data from external database*  
see [chapter "Recording Check Mechanism for SfB"](#), p. 18
- *Evaluation templates*  
see [chapter "Import evaluation templates"](#), p. 25
- *Evaluations*  
see [chapter "Import evaluations"](#), p. 34
- *Call Director customer surveys*  
see [chapter "Call Director customer surveys"](#), p. 42

### 6.1 Recording Check Mechanism

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

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

The feature is currently available for the following integrations:

- [Cisco UCM](#), see [chapter "Recording Check Mechanism for Cisco"](#), p. 11
- [Skype for Business \(SfB\)](#), see [chapter "Recording Check Mechanism for SfB"](#), p. 18




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

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#### 6.1.1 Recording Check Mechanism for Cisco

To save the log files written by the [Cisco UCM](#), an [SFTP](#) server must be available.

The [CDR](#) files are saved by the [Cisco UCM](#) via [SFTP](#) on an [SFTP](#) server every minute. From this [SFTP](#) server, the log files are imported to the [neo](#) server. The [CDR](#) data is written into a table of the database and can that way be compared with the saved recordings.

In the application [INSIGHTneo](#), a job must be configured which compares the counted database entries with the saved recordings of the recording server. The result can be displayed as a report in the web interface.

Log files which have already been imported are checked by default by the [Cisco UCM](#) and deleted in predefined intervals, e. g. after 30 days.

For the import, you must create a configuration in the Configuration Import module. The import job can be configured cyclically for continuous comparison.

1. To be able to configure a configuration import job, you must have created an [XSLT](#) mapping file previously.
2. Select the menu item *More > XSLT Management* in the navigation bar.
3. Create an [XSLT](#) mapping for the import of Cisco CDR data from an external database and map a corresponding [XSLT](#) file to this [XSLT](#) mapping.



For information about the XSLT Management module refer to the administration manual *XSLT management*.

#### 6.1.1.1

#### Create import source

You have to create an import source for each import format that you would like to use.



An import source is always created for a certain import format which cannot be changed any more later on.

1. Click on the icon  (*Create New Import Source*) in the main view.

⇒ The available formats appear in the context menu.

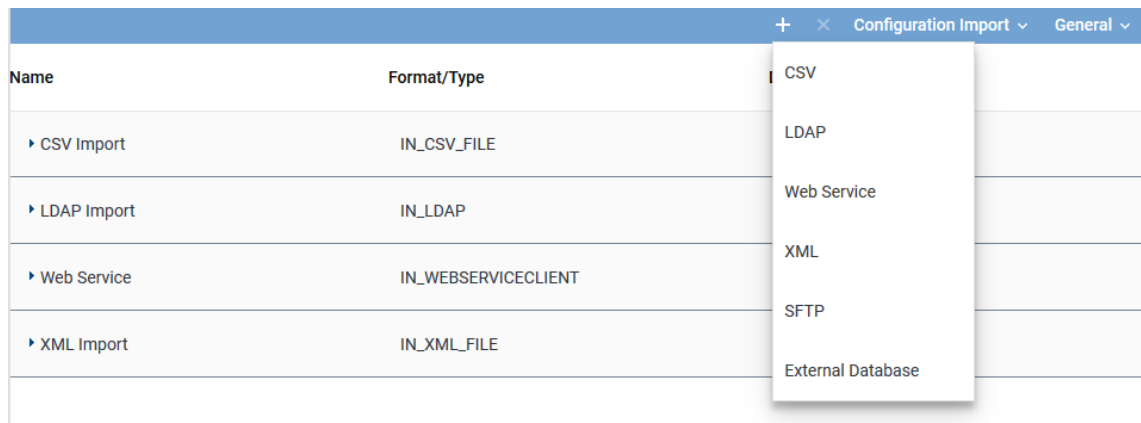



Fig. 3: Create import source

#### 6.1.1.1.1

#### Create import source for SFTP import

The following import format is available for the import of conversations for the **Recording Check Mechanism for Cisco**:

- *SFTP*
1. Click on the icon  (*Create*) in the toolbar.
  2. From the context menu, select the format *SFTP* as import source for the import of Cisco CDR data.

In the detail view of the import source, you can configure the connection data.

Cisco CDR
✕

<
Details\*
>

[? Help](#)

Import Source
▼

Import format	SFTP
Name*	<input type="text" value="Cisco CDR"/>
Description	<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>

Connection Data
▼

Host name/IP*	<input type="text" value="192.168.173.172"/>
Port*	<input type="text" value="22"/>
User name*	<input type="text" value="root"/>
Password*	<input type="password" value="••••"/>
Source directory*	<input type="text" value="calldata"/>

Save

Reset

Fig. 4: Detail view Configure import source for SFTP import

3. Enter the following parameters:

#### Group field Import Source

<i>Import format</i>	The import format <i>SFTP</i> is available for this import job.
<i>Name</i>	Enter a name for the import job.
<i>Description</i>	Enter an optional description of the import job.

#### Group field Connection Data

<i>Host name/IP</i>	Enter the IP address or the host name from which the data is supposed to be imported.
<i>Port</i>	Enter the port via which the data is supposed to be imported.
<i>User name</i>	Enter the user name which is supposed to be used for the login of the connection establishment
<i>Password</i>	Enter the password with which the user is supposed to authenticate to access the database.
<i>Source directory</i>	Enter the directory from which the data is supposed to be imported.

- Click on the button **Save** to save the entries.  
⇒ The import source appears in the main view.
- Now, you can configure an import job for this import source.

### Create import configuration

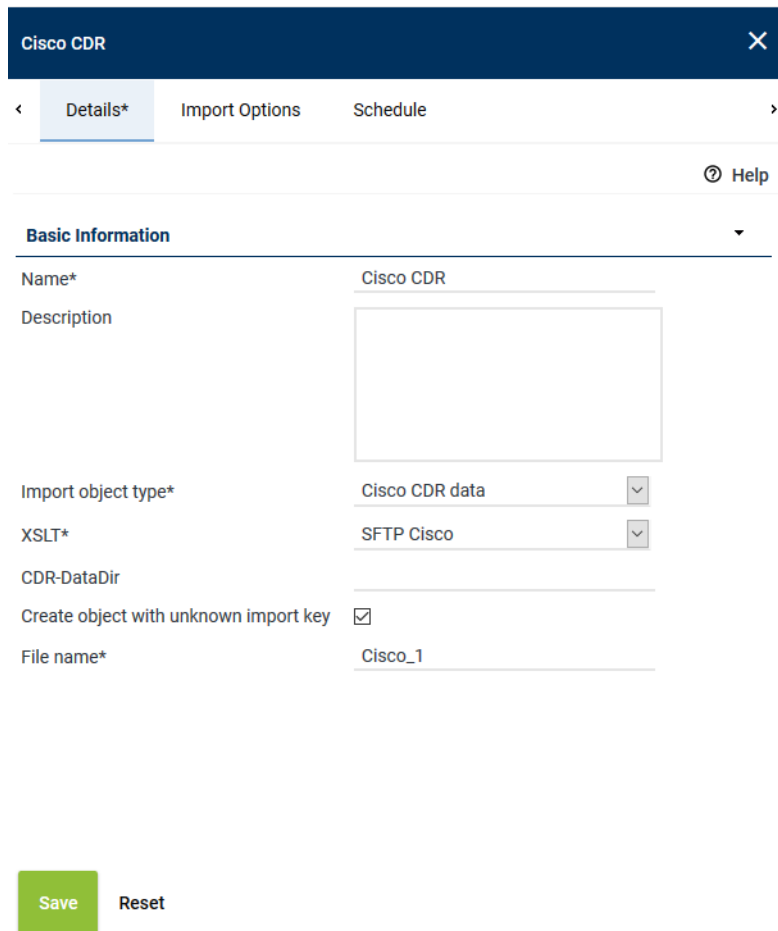
By means of an import configuration, you can create an import job which effects the respective import.

1. In the main view, select the import source for which you would like to configure the import.
2. Click on the menu item *Configuration Import* in the toolbar.
3. Select the menu item *Create New Import Configuration* from the context menu.

### Create import job for the SFTP import

#### Tab Details

In this tab, you can enter the basic information about the import of the Cisco CDR data..



The screenshot shows a web interface for configuring an import job. At the top, there's a dark blue header with 'Cisco CDR' and a close button. Below it, a tab bar has 'Details\*' (selected), 'Import Options', and 'Schedule'. A 'Help' icon is on the right. The 'Basic Information' section contains the following fields:

- Name\***: Cisco CDR
- Description**: (empty text area)
- Import object type\***: Cisco CDR data (dropdown)
- XSLT\***: SFTP Cisco (dropdown)
- CDR-DataDir**: (empty text field)
- Create object with unknown import key**: ☒
- File name\***: Cisco\_1

At the bottom, there are 'Save' and 'Reset' buttons.

Fig. 5: Import configuration - tab Details for SFTP import

1. Enter the following parameters:

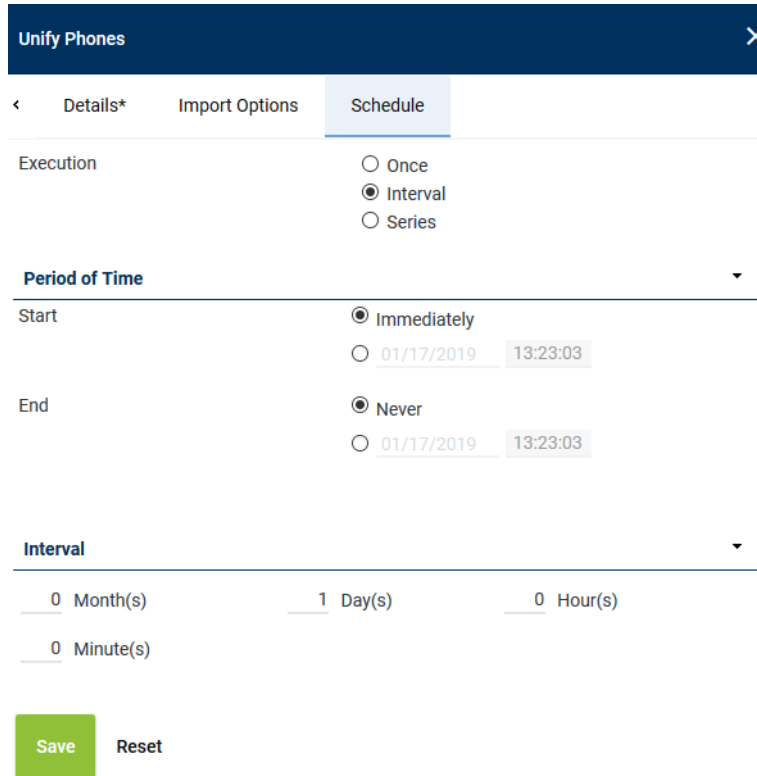
<b>Name</b>	Enter the name of the import job.
<b>Description</b>	Enter an optional description of the import job.
<b>Import object type</b>	Select the import object type <i>Cisco CDR data</i> from the drop-down list.
<b>XSLT</b>	From the drop-down list, select the <a href="#">XSLT</a> mapping file that you have created previously in the XSLT Management module module.
<b>CDR-DataDir</b>	Enter the directory in which the CDR log files have been saved.
<b>Create object with unknown import key</b>	Select whether new sets of data can be imported and created or whether only existing sets of data are supposed to be refreshed. <input checked="" type="checkbox"/> = New sets of data can be created.

☐ = No new sets of data.

**File name** Enter the file name of the CDR log file.

### Tab Schedule

In this tab, you can configure the 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) 1 Day(s) 0 Hour(s)  
 0 Minute(s)

**Save** **Reset**

Fig. 6: Tab Schedule

Select how often the job is supposed to be executed.

- |                  |  |
|------------------|--|
| <b>Execution</b> | <ul style="list-style-type: none"> <li>• <b>Once</b><br/>Select this option if the job is supposed to be executed only once and started on the date which has been defined in the section <i>Period of Time</i>.</li> <li>• <b>Interval</b><br/>The job is repeated in intervals as defined in the group field <i>Interval</i>.</li> <li>• <b>Series</b><br/>The job is repeated on serial dates as defined in the group field <i>Series</i>.</li> </ul> |
|------------------|--|

If an import 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, see administration manual *System Configuration Notifications module*.

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

If the failed job is a job of the execution type *Once*, you have to initiate the job manually once again, after eliminating the underlying cause for the failure. Otherwise the job is not executed again.





### 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. 7: Schedule - Period of Time

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

### Group field Interval



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

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

**Interval** ▼

<input type="text"/> 0 Month(s)	<input type="text"/> 0 Day(s)	<input type="text"/> 0 Hour(s)
<input type="text"/> 5 Minute(s)		

Fig. 8: Schedule - Interval

You can define the interval arbitrarily. Enter the values directly into the entry fields via the keyboard.

### Group field Series



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

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



**Series** ▼

---

Repeat

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

Fig. 9: Schedule - Series

<b>Repeat</b>	Days on which the job is supposed to be executed.
	<ul style="list-style-type: none"> <li>• <b>Daily</b> The job is repeated daily.</li> <li>• <b>Weekly</b> The job is repeated on the selected days. You can select one or several weekdays.</li> <li>• <b>Monthly</b> The job is repeated on the selected days. You can either select particular dates or certain days. See <a href="#">chapter "Configure monthly repetition on fixed dates", p. 17</a> and <a href="#">chapter "Configure monthly repetition on fixed days", p. 18</a>.</li> </ul>

### Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly  
☒  + -  
☐ First ▼ Monday ▼

Fig. 10: Configure fixed dates

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

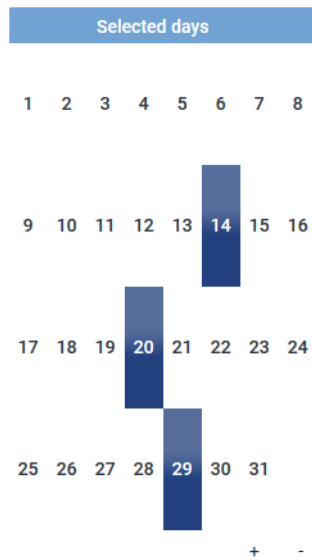


Fig. 11: Select dates

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

### Configure monthly repetition on fixed days

1. Select the lower option:

☒ Monthly  
☐ + -  
☒ First Monday

Fig. 12: Configure fixed days

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

### Save import job

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

## 6.1.2 Recording Check Mechanism for SfB

To ensure that in **SfB** session data are created, the **SfB** monitor option must have been configured.

The log files for **SfB** are saved in an external database.

From this external database, the log files are imported to the **neo** server. The SfB session data is written into a table of the database and can that way be compared with the saved recordings.

In the application INSIGHT<sub>neo</sub>, a job must be configured which compares the counted database entries with the saved recordings of the recording server. The result can be displayed as a report in the web interface.



Basic information about using the application INSIGHT<sub>neo</sub> can be found in the user manual *INSIGHT<sub>neo</sub> - General information*.

For the import, you must create a configuration in the Configuration Import module. The import job can be configured cyclically for continuous comparison.

1. To be able to configure a configuration import job, you must create an [XSLT](#) mapping file.
2. Select the menu item *More > XSLT Management* in the navigation bar.
3. Create an [XSLT](#) mapping for the import of SfB session data from an external database and map a corresponding [XSLT](#) file to this [XSLT](#) mapping.



For information about the XSLT Management module refer to the administration manual *XSLT management*.


### 6.1.2.1

#### Create import source

You have to create an import source for each import format that you would like to use.



An import source is always created for a certain import format which cannot be changed any more later on.

1. Click on the icon  (*Create New Import Source*) in the main view.  
⇒ The available formats appear in the context menu.

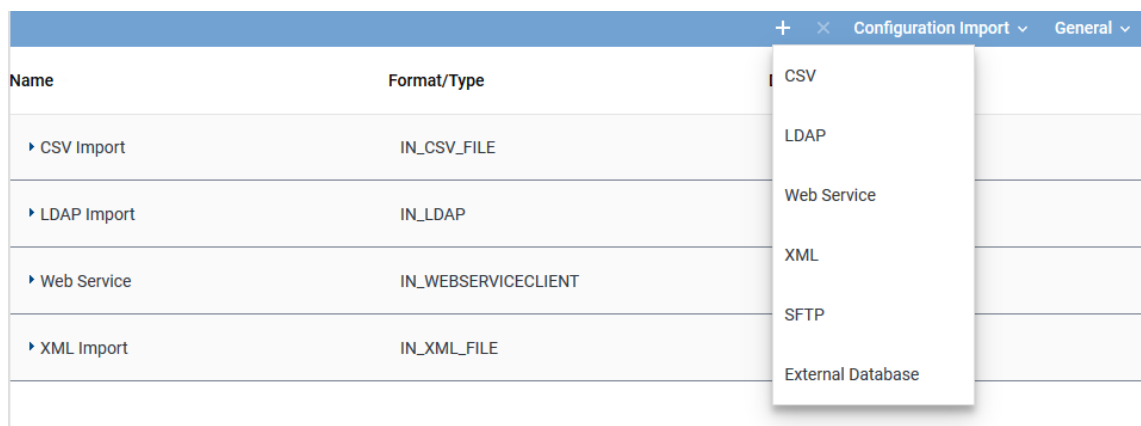



Fig. 13: Create import source

### 6.1.2.1.1

#### Create import source for an external database

The following import format is available for the import of conversations for the **Recording Check Mechanism for SfB**:

- *External database*
1. Click on the icon  (*Create*) in the toolbar.
  2. From the context menu, select the format *External database* as import source.
- In the detail view of the import source, you can configure the connection data.

SfB-CDR-Daten
✕

< Details\* >

[② Help](#)

Import Source

Import format
Database

Name\*
SfB session data

Description

Connection Data

Database type
MSSQL ▼

Host name/IP\*
192.168.173.172

Port\*
22

User name\*
system-admin

Password\*
•

Name of the database\*
SfB\_sessions

Database scheme\*
dbo

Save

Reset

Fig. 14: Detail view Configure import source for an external database

3. Enter the following parameters:

#### Group field Import Source

<i>Import format</i>	The import format <i>Database</i> is available for this import job.
<i>Name</i>	Enter a name for the import job.
<i>Description</i>	Enter an optional description of the import job.

#### Group field Connection Data

<i>Database type</i>	From the drop-down list, select the database type <b>MSSQL</b> for the import of <i>SfB</i> session data.
<i>Host name/IP</i>	Enter the host name or the IP address of the server that the database runs on.
<i>Port</i>	Enter the port via which the data is supposed to be imported.
<i>User name</i>	Enter the user name which is supposed to be used for the login of the connection establishment
<i>Password</i>	Enter the password with which the user is supposed to authenticate to access the database.
<i>Name of the database</i>	Enter the name of the database.
<i>Database scheme</i>	Enter the scheme of the database.

1. Click on the button *Save* to save the entries.  
⇒ The import source appears in the main view.
2. Now, you can configure an import job for this import source.

### Create import configuration

By means of an import configuration, you can create an import job which effects the respective import.

1. In the main view, select the import source for which you would like to configure the import.
2. Click on the menu item *Configuration Import* in the toolbar.
3. Select the menu item *Create New Import Configuration* from the context menu.

### Create import job for the import from external database

#### Tab Details

In this tab, you can enter the basic information about the import for **SfB** session data from an external database.

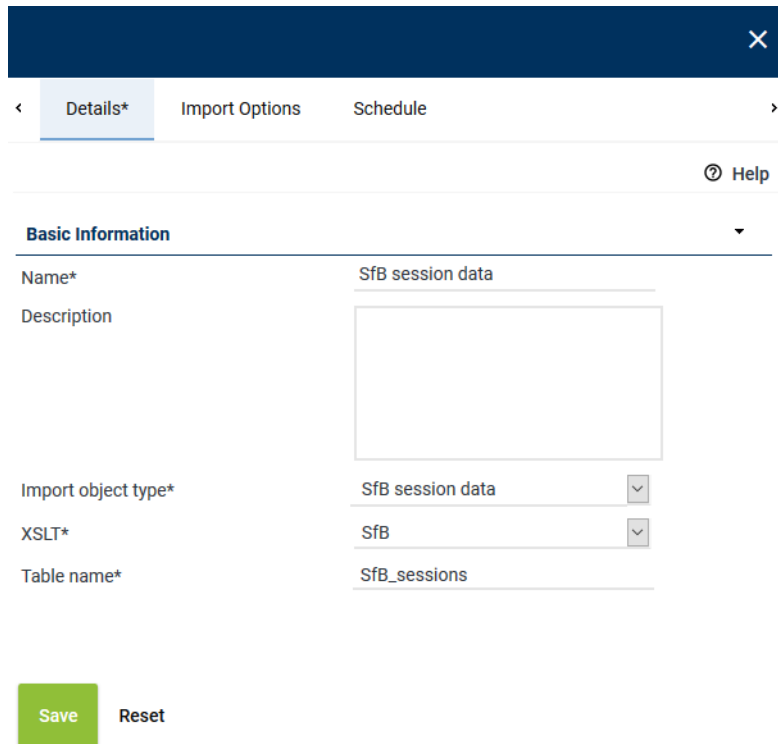


Fig. 15: Import configuration - Tab Details for the import from external database

1. Enter the following parameters:

<b>Name</b>	Enter the name of the import job.
<b>Description</b>	Enter an optional description of the import job.
<b>Import object type</b>	Select the import object type <i>SfB session data</i> from the drop-down list.
<b>XSLT</b>	From the drop-down list, select the <b>XSLT</b> mapping file that you have created previously in the XSLT Management module module.
<b>Table name</b>	Enter the name of the table from which the data is supposed to be read out.

### Tab Schedule

In this tab, you can configure the schedule.

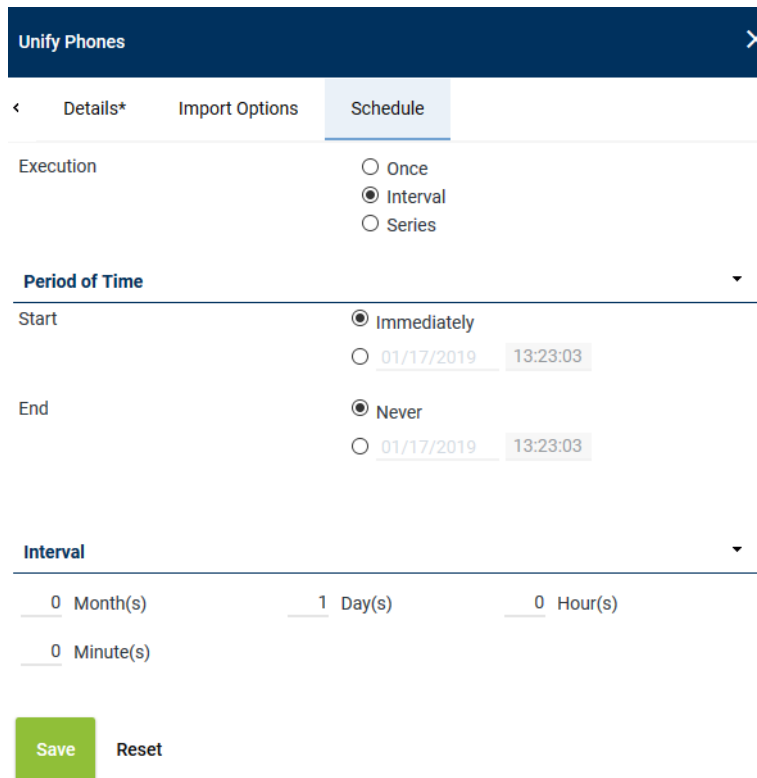


Fig. 16: Tab Schedule

Select how often the job is supposed to be executed.

- |                  |  |
|------------------|--|
| <b>Execution</b> | <ul style="list-style-type: none"> <li>• <b>Once</b><br/>Select this option if the job is supposed to be executed only once and started on the date which has been defined in the section <i>Period of Time</i>.</li> <li>• <b>Interval</b><br/>The job is repeated in intervals as defined in the group field <i>Interval</i>.</li> <li>• <b>Series</b><br/>The job is repeated on serial dates as defined in the group field <i>Series</i>.</li> </ul> |
|------------------|--|

If an import 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, see administration manual *System Configuration Notifications module*.



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

If the failed job is a job of the execution type *Once*, you have to initiate the job manually once again, after eliminating the underlying cause for the failure. Otherwise the job is not executed again.

### Group field Period of Time



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

**Period of Time** ▼

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

End ☒ Never  
☐ 11/16/2018 08:10:46

Fig. 17: Schedule - Period of Time

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

### Group field Interval



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

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

**Interval** ▼

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

5 Minute(s)

Fig. 18: Schedule - Interval

You can define the interval arbitrarily. Enter the values directly into the entry fields via the keyboard.

### Group field Series



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

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

**Series** ▼

---

Repeat

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

Fig. 19: Schedule - Series

<b>Repeat</b>	Days on which the job is supposed to be executed.
	<ul style="list-style-type: none"> <li>• <b>Daily</b> The job is repeated daily.</li> <li>• <b>Weekly</b> The job is repeated on the selected days. You can select one or several weekdays.</li> <li>• <b>Monthly</b> The job is repeated on the selected days. You can either select particular dates or certain days. See <a href="#">chapter "Configure monthly repetition on fixed dates", p. 24</a> and <a href="#">chapter "Configure monthly repetition on fixed days", p. 25</a>.</li> </ul>

### Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly  
☒  + -  
☐ First ▼ Monday ▼

Fig. 20: Configure fixed dates

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



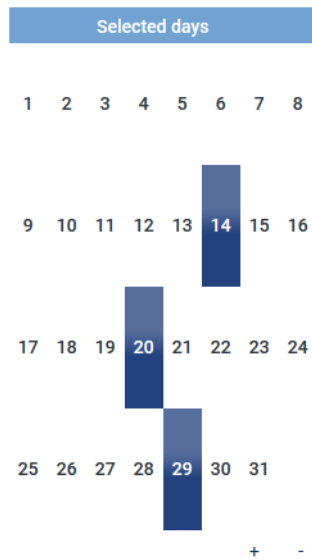


Fig. 21: Select dates

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

### Configure monthly repetition on fixed days

1. Select the lower option:

☒ Monthly  
☐ + -  
☒ First Monday

Fig. 22: Configure fixed days

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

### Save import job

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

## 6.2 Import evaluation templates

By means of this import, you can migrate evaluation templates from version 10 systems to a neo system.

For the import, you must create a configuration in the Configuration Import module. The import job can be configured cyclically for a continuous import.



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

1. To be able to configure a configuration import job, you must create an [XSLT](#) mapping file.
2. Select the menu item *More > XSLT Management* in the navigation bar.
3. Create an [XSLT](#) mapping for the import with an [XML](#) file and map a corresponding [XSLT](#) file to this [XSLT](#) mapping.



For information about the XSLT Management module refer to the administration manual *XSLT management*.


### 6.2.1

#### Create import source

You have to create an import source for each import format that you would like to use.



An import source is always created for a certain import format which cannot be changed any more later on.

1. Click on the icon  (*Create New Import Source*) in the main view.  
⇒ The available formats appear in the context menu.

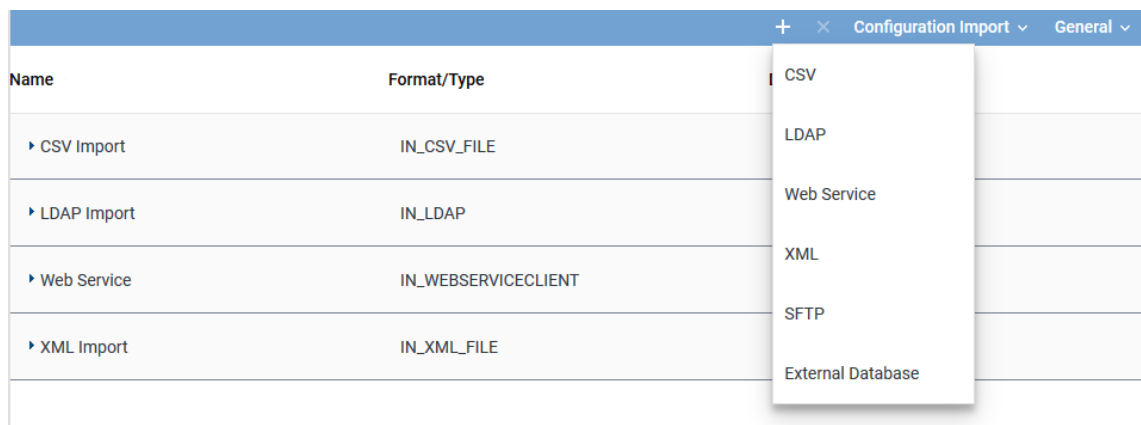



Fig. 23: Create import source

The following import format is available to import evaluation templates, evaluations, and Call Director customer surveys:

- *XML*

#### 6.2.1.1

##### Create import source for XML import

1. Click on the icon  (*Create*) in the toolbar.
2. From the context menu, select the format *XML* as import source.

In the detail view of the import source, you can configure the connection data.

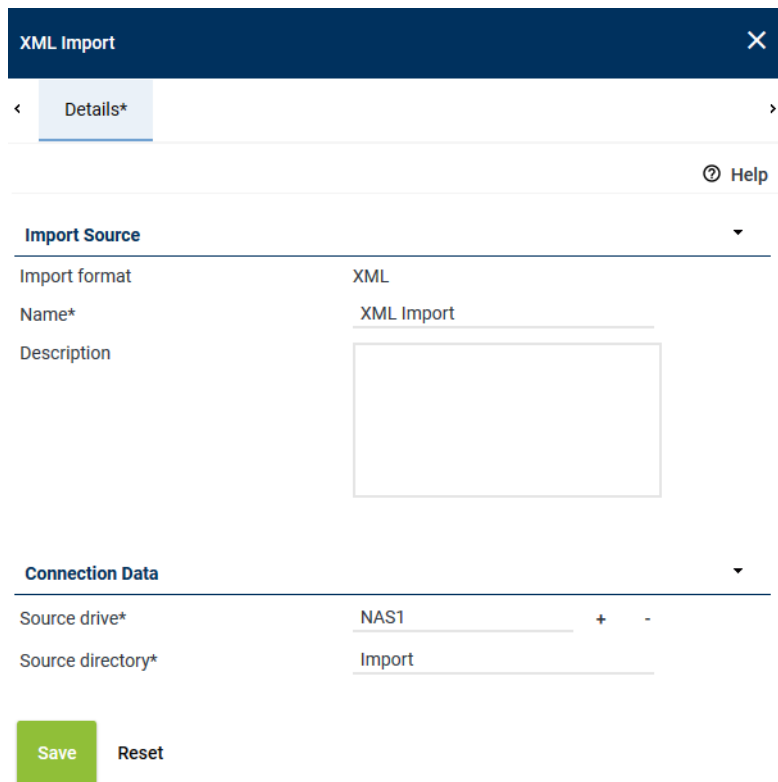


Fig. 24: Detail view Configure import source for XML

3. Enter the following parameters:

#### Group field Import Source

<i>Name</i>	Enter a name for the import source.
<i>Description</i>	You have to option to enter a description for this import source.

#### Group field Connection Data

For an [XML](#) import, a drive must have been configured so that you can access it from here as source. **NOTICE!** The drive is set up by your system provider.

<i>Source drive</i>	Enter the drive where the directory with the file for the import is located, see Assign drive.
<i>Source directory</i>	Enter the directory where the file for the import is located.

- Click on the button *Save* to save the entries.  
⇒ The import source appears in the main view.
- Now, you can configure an import job for this import source.

##### 6.2.1.1.1 Create import configuration

By means of an import configuration, you can create an import job which effects the respective import.

- In the main view, select the import source for which you would like to configure the import.
- Click on the menu item *Configuration Import* in the toolbar.
- Select the menu item *Create New Import Configuration* from the context menu.

## Create import job for XML import

### Tab Details

In this tab, you can enter the basic information about the [XML](#) import for evaluation templates.

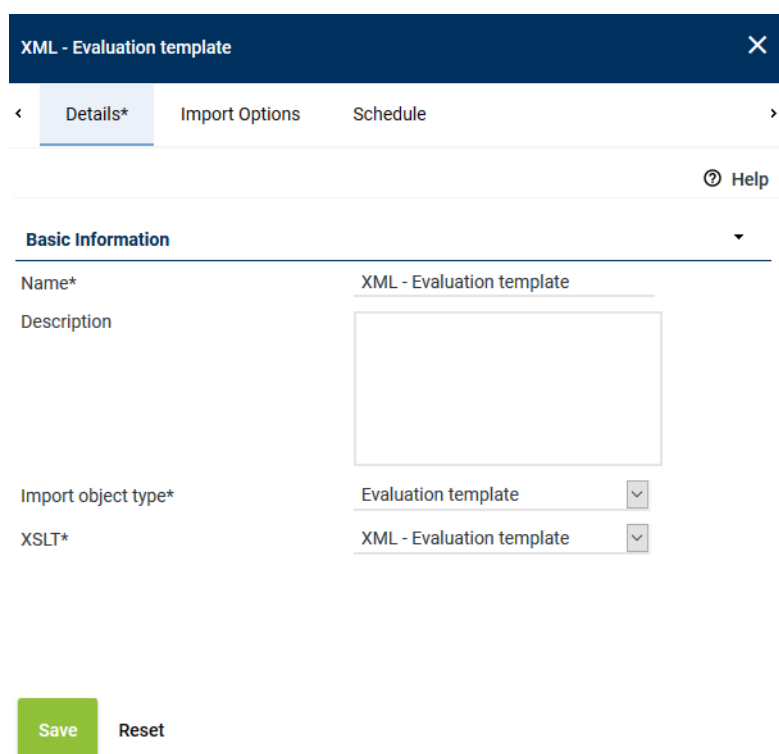


Fig. 25: Import configuration - Tab Details for the import of evaluation templates

<i>Name</i>	Enter the name of the import job.
<i>Description</i>	Enter an optional description of the import job.
<i>Import object type</i>	Select the import object type <i>Evaluation template</i> from the drop-down list.
<i>XSLT</i>	From the drop-down list, select the <a href="#">XSLT</a> mapping file that you have created previously in the XSLT Management module module.

### Tab Import Options

In this tab, you can define according to which criteria objects are supposed to be created and deleted. In addition, you can define stop criteria for the import.

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. 26: Import configuration - tab Import Options

### Group field Create and Delete Objects

<i>Create object with unknown import key</i>	Select whether new sets of data can be imported and created or whether only existing sets of data are supposed to be refreshed. <input checked="" type="checkbox"/> = New sets of data can be created. <input type="checkbox"/> = No new sets of data.
<i>Delete object without imported import key</i>	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. <input checked="" type="checkbox"/> = Sets of data from other imports are deleted. <input type="checkbox"/> = Sets of data from other imports are not deleted. <b>NOTICE!</b> In the event of an error during the import, the function is deactivated automatically, i. e. no sets of data are deleted. <b>NOTICE!</b> Manually created sets of data are not deleted.
<i>Update phones without import key if the names of the phones are the same</i>	Select whether existing phones can be imported and updated if they do not have an import key but the phone name is known. <input checked="" type="checkbox"/> = Phone data can be updated. <input type="checkbox"/> = Phone data cannot be updated.

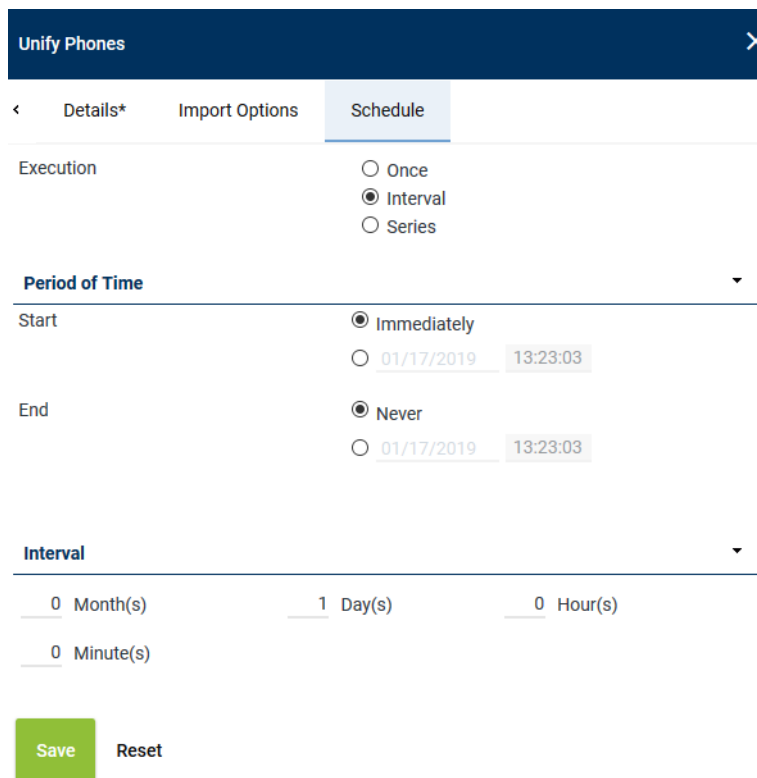
### Group field Stop Criteria

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

### Tab Schedule

In this tab, you can configure the 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) 1 Day(s) 0 Hour(s)  
 0 Minute(s)

**Save** Reset

Fig. 27: Tab Schedule

Select how often the job is supposed to be executed.

<i>Execution</i>	<ul style="list-style-type: none"> <li>• <i>Once</i> Select this option if the job is supposed to be executed only once and started on the date which has been defined in the section <i>Period of Time</i>.</li> <li>• <i>Interval</i> The job is repeated in intervals as defined in the group field <i>Interval</i>.</li> <li>• <i>Series</i> The job is repeated on serial dates as defined in the group field <i>Series</i>.</li> </ul>
------------------	--



If an import 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, see administration manual *System Configuration Notifications module*.

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



If the failed job is a job of the execution type *Once*, you have to initiate the job manually once again, after eliminating the underlying cause for the failure. Otherwise the job is not executed again.

### 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"/> 11/16/2011 08:10:46
End	<input checked="" type="radio"/> Never <input type="radio"/> 11/16/2011 08:10:46

Fig. 28: Schedule - Period of Time

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

### Group field Interval



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

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

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

Fig. 29: Schedule - Interval

You can define the interval arbitrarily. Enter the values directly into the entry fields via the keyboard.

### Group field Series



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

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

**Series** ▼

Repeat

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

Fig. 30: Schedule - Series

<b>Repeat</b>	Days on which the job is supposed to be executed.
	<ul style="list-style-type: none"> <li>• <i>Daily</i> The job is repeated daily.</li> <li>• <i>Weekly</i> The job is repeated on the selected days. You can select one or several weekdays.</li> <li>• <i>Monthly</i> The job is repeated on the selected days. You can either select particular dates or certain days. See <a href="#">chapter "Configure monthly repetition on fixed dates", p. 32</a> and <a href="#">chapter "Configure monthly repetition on fixed days", p. 33</a>.</li> </ul>

### Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly  
☒  + -  
☐ First  Monday

Fig. 31: Configure fixed dates

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



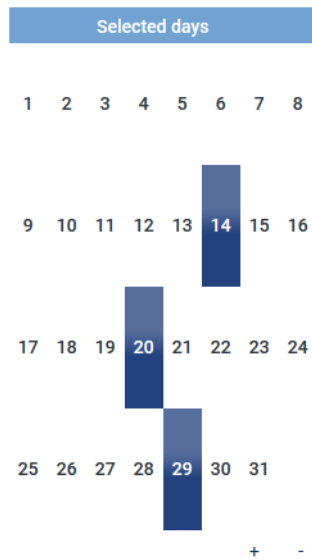


Fig. 32: Select dates

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

### Configure monthly repetition on fixed days

1. Select the lower option:

☒ Monthly  
☐ + -  
☒ First Monday

Fig. 33: Configure fixed days

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

### Save import job

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

#### 6.2.1.1.2 Assign drive

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

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

Zeilen pro Seite 20 0 - 0 von 0

Hinzufügen Abbrechen

Fig. 34: Add drive

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

### 6.3 Import evaluations

By means of this import, you can migrate evaluation templates from version 10 systems to a neo system.

For the import, you must create a configuration in the Configuration Import module. The import job can be configured cyclically for a continuous import.



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

- To be able to configure a configuration import job, you must create an **XSLT** mapping file.
- Select the menu item *More > XSLT Management* in the navigation bar.
- Create an **XSLT** mapping for the import with an **XML** file and map a corresponding **XSLT** file to this **XSLT** mapping.




For information about the XSLT Management module refer to the administration manual *XSLT management*.

#### 6.3.1 Create import source

You have to create an import source for each import format that you would like to use.



An import source is always created for a certain import format which cannot be changed any more later on.

- Click on the icon  (*Create New Import Source*) in the main view.  
⇒ The available formats appear in the context menu.


		Configuration Import ▾	General ▾
Name	Format/Type		
▸ CSV Import	IN_CSV_FILE	CSV	
▸ LDAP Import	IN_LDAP	LDAP	
▸ Web Service	IN_WEBSERVICECLIENT	Web Service	
▸ XML Import	IN_XML_FILE	XML	
		SFTP	
		External Database	

Fig. 35: Create import source

The following import format is available to import evaluation templates, evaluations, and Call Director customer surveys:

- XML

### 6.3.1.1 Create import source for XML import

1. Click on the icon  (Create) in the toolbar.
2. From the context menu, select the format *XML* as import source.

In the detail view of the import source, you can configure the connection data.

XML Import
✕

Details\*

Help

Import Source

Import formatXML

Name\*XML Import

Description

Connection Data

Source drive\*NAS1

Source directory\*Import

Save
Reset

Fig. 36: Detail view Configure import source for XML

3. Enter the following parameters:

#### Group field Import Source

Name	Enter a name for the import source.
Description	You have to option to enter a description for this import source.

### Group field Connection Data

For an [XML](#) import, a drive must have been configured so that you can access it from here as source. **NOTICE!** The drive is set up by your system provider.

<i>Source drive</i>	Enter the drive where the directory with the file for the import is located, see Assign drive.
<i>Source directory</i>	Enter the directory where the file for the import is located.

1. Click on the button **Save** to save the entries.  
⇒ The import source appears in the main view.
2. Now, you can configure an import job for this import source.

#### 6.3.1.1.1 Create import configuration

By means of an import configuration, you can create an import job which effects the respective import.

1. In the main view, select the import source for which you would like to configure the import.
2. Click on the menu item *Configuration Import* in the toolbar.
3. Select the menu item *Create New Import Configuration* from the context menu.

### Create import job for XML import

#### Tab Details

In this tab, you can enter the basic information about the [XML](#) import for evaluations.

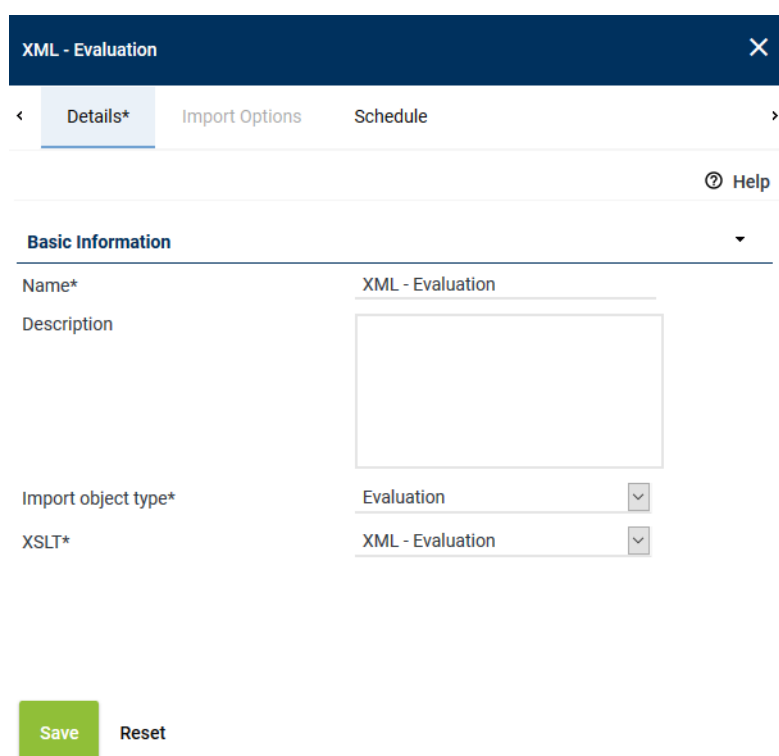


Fig. 37: Import configuration - Tab Details for the import of evaluations

<i>Name</i>	Enter the name of the import job.
<i>Description</i>	Enter an optional description of the import job.
<i>Import object type</i>	Select the import object type <i>Evaluation</i> from the drop-down list.

**XSLT**

From the drop-down list, select the **XSLT** mapping file that you have created previously in the XSLT Management module module.

**Tab Import Options**

In this tab, you can define according to which criteria objects are supposed to be created and deleted. In addition, you can define stop criteria for the import.

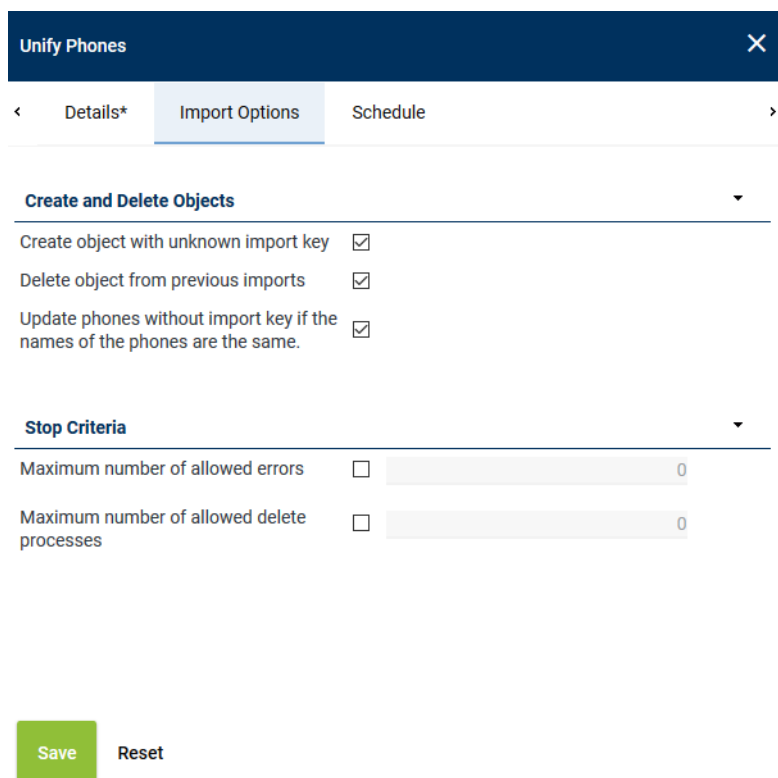


Fig. 38: Import configuration - tab Import Options

**Group field Create and Delete Objects**

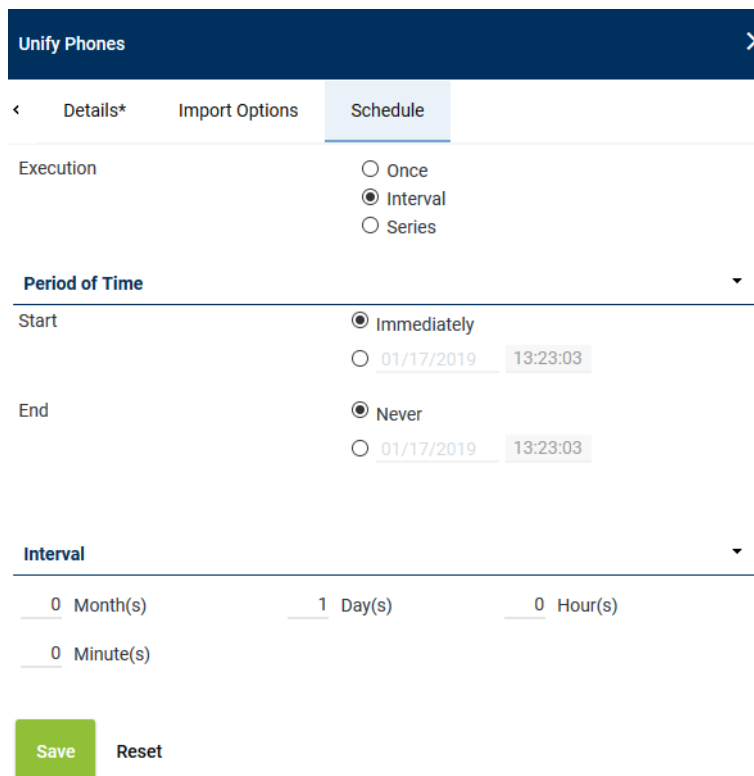
<i>Create object with unknown import key</i>	<p>Select whether new sets of data can be imported and created or whether only existing sets of data are supposed to be refreshed.</p> <p><input checked="" type="checkbox"/> = New sets of data can be created.</p> <p><input type="checkbox"/> = No new sets of data.</p>
<i>Delete object without imported import key</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.</p> <p><input type="checkbox"/> = Sets of data from other imports are not deleted.</p> <p><b>NOTICE!</b> In the event of an error during the import, the function is deactivated automatically, i. e. no sets of data are deleted.</p> <p><b>NOTICE!</b> Manually created sets of data are not deleted.</p>
<i>Update phones without import key if the names of the phones are the same</i>	<p>Select whether existing phones can be imported and updated if they do not have an import key but the phone name is known.</p> <p><input checked="" type="checkbox"/> = Phone data can be updated.</p> <p><input type="checkbox"/> = Phone 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 <a href="#">PBX</a>, not being able to find a role or organization unit or a user missing essentially required attributes.</p> <p><input checked="" type="checkbox"/> = Import job is canceled when the number of errors entered here is exceeded.</p> <p><input type="checkbox"/> = Import job is not canceled.</p>
<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.</p> <p><input type="checkbox"/> = Deletion process is not canceled.</p>

### Tab Schedule

In this tab, you can configure the 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) 1 Day(s) 0 Hour(s)

0 Minute(s)

Save Reset

Fig. 39: Tab Schedule

Select how often the job is supposed to be executed.

<i>Execution</i>	<ul style="list-style-type: none"> <li>• <i>Once</i></li> </ul> <p>Select this option if the job is supposed to be executed only once and started on the date which has been defined in the section <i>Period of Time</i>.</p> <ul style="list-style-type: none"> <li>• <i>Interval</i></li> </ul>
------------------	--

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

- *Series*

The job is repeated on serial dates as defined in the group field *Series*.

If an import 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, see administration manual *System Configuration Notifications module*.

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

If the failed job is a job of the execution type *Once*, you have to initiate the job manually once again, after eliminating the underlying cause for the failure. Otherwise the job is not executed again.

### Group field Period of Time

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

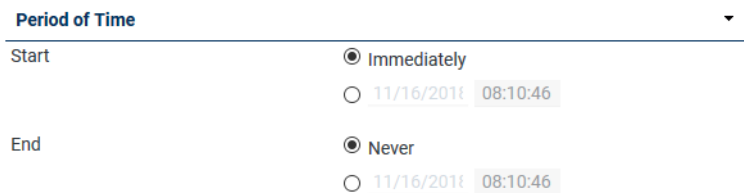




Fig. 40: Schedule - Period of Time

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

### Group field Interval

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

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

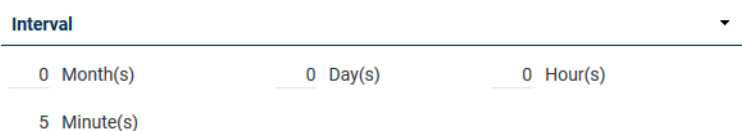


Fig. 41: Schedule - Interval

You can define the interval arbitrarily. Enter the values directly into the entry fields via the keyboard.

### Group field Series



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

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

**Series** ▼

Repeat

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

Fig. 42: Schedule - Series

Repeat	Days on which the job is supposed to be executed.
	<ul style="list-style-type: none"> <li>• <i>Daily</i> The job is repeated daily.</li> <li>• <i>Weekly</i> The job is repeated on the selected days. You can select one or several weekdays.</li> <li>• <i>Monthly</i> The job is repeated on the selected days. You can either select particular dates or certain days. See <a href="#">chapter "Configure monthly repetition on fixed dates", p. 40</a> and <a href="#">chapter "Configure monthly repetition on fixed days", p. 41</a>.</li> </ul>

### Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly  
☒  + -  
☐ First ▼ Monday ▼

Fig. 43: Configure fixed dates

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



The calendar grid shows the following 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. The days 14, 20, and 29 are highlighted in dark blue, indicating they are the selected days for the week.

*Fig. 44: 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.

### Configure monthly repetition on fixed days

1. Select the lower option:

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


*Fig. 45: Configure fixed days*

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

## Save import job

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

#### 6.3.1.1.2 Assign drive

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

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

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Fig. 46: Add drive

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

## 6.4 Call Director customer surveys

To be able to assess the results of a Call Director customer survey in the application INSPIRATION<sub>neo</sub>, these results have to be imported from the Unify Call Director software into the recording system. For this import, you have to use an adjusted default XSLT file.

### Adjust XSLT file

To be able to carry out a configuration import, you must adjust the default XSLT file. You find the XSLT templates in the following path:

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

- Create a copy of the default XSLT file *Call\_Director\_CUSTOMCP01.xslt*.
- In the copied file, in the parameter *CustomParameter*, replace the preset additional data type **ID CUSTOMCP01** with the **ID** of the additional data type that the call ID is saved in.  
**NOTICE!** Your system provider will provide you with the information which additional data type ID you have to enter.

### Map XSLT files

- Select the menu item *More > XSLT Management* in the navigation bar.
- Create an **XSLT** mapping for the import of the results of Call Director customer surveys and map the adjusted **XSLT** file to this **XSLT** mapping.



For information about the XSLT Management module refer to the administration manual *XSLT management*.

**Additional preconditions** for the import of results of Call Director customer surveys:

- The **system provider** must have placed a **NAS** drive at your disposal which has been connected to the directory which contains the results of the Call Director customer survey.

In the Drives module, you see which drives are at your disposal.



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



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


#### 6.4.1

##### Create import source

You have to create an import source for each import format that you would like to use.



An import source is always created for a certain import format which cannot be changed any more later on.

- Click on the icon  (*Create New Import Source*) in the main view.  
⇒ The available formats appear in the context menu.

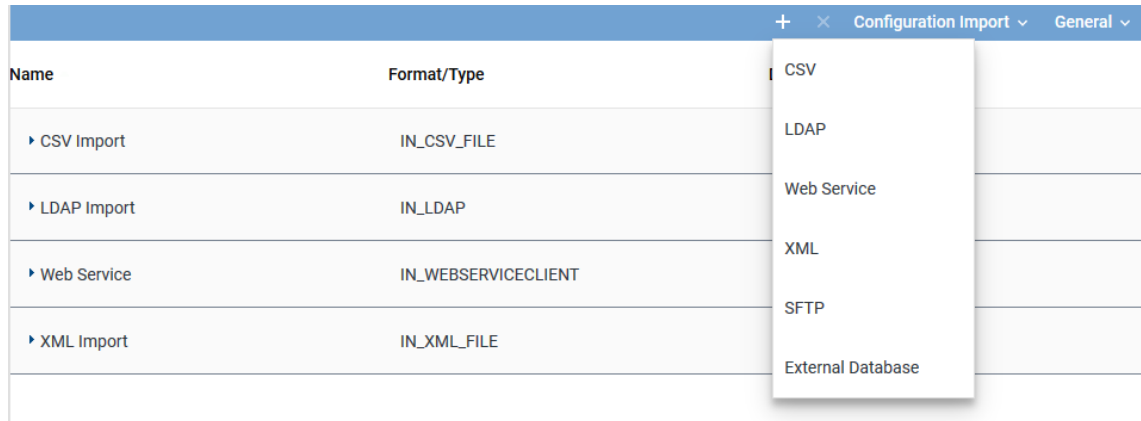



Fig. 47: Create import source

The following import format is available to import evaluation templates, evaluations, and Call Director customer surveys:

- XML

##### 6.4.1.1

##### Create import source for XML import

- Click on the icon  (*Create*) in the toolbar.
  - From the context menu, select the format *XML* as import source.
- In the detail view of the import source, you can configure the connection data.

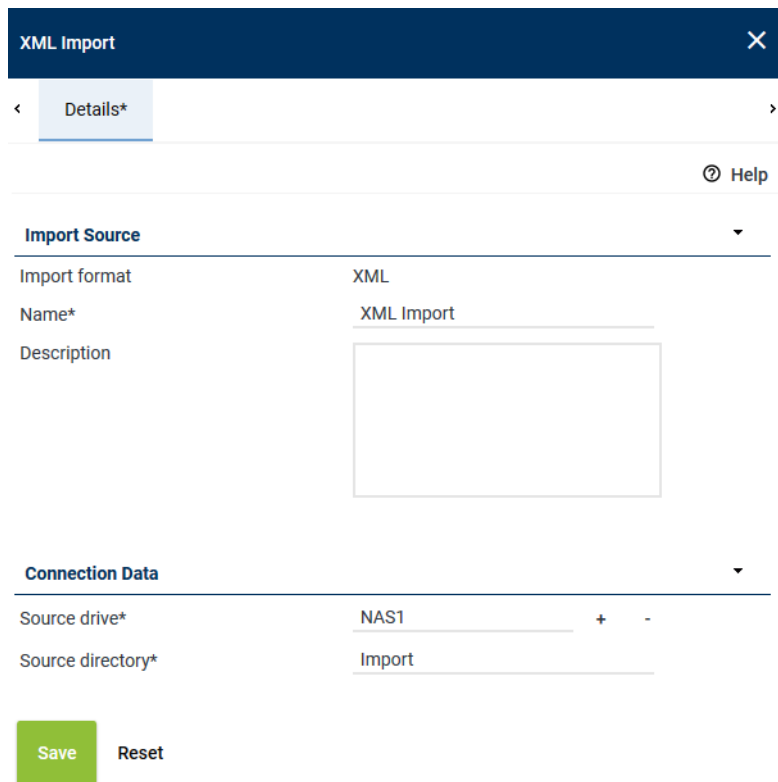


Fig. 48: Detail view Configure import source for XML

3. Enter the following parameters:

#### Group field Import Source

<i>Name</i>	Enter a name for the import source.
<i>Description</i>	You have to option to enter a description for this import source.

#### Group field Connection Data

For an [XML](#) import, a drive must have been configured so that you can access it from here as source. **NOTICE!** The drive is set up by your system provider.

<i>Source drive</i>	Enter the drive where the directory with the file for the import is located, see Assign drive.
<i>Source directory</i>	Enter the directory where the file for the import is located.

1. Click on the button *Save* to save the entries.  
⇒ The import source appears in the main view.
2. Now, you can configure an import job for this import source.

#### 6.4.1.1.1 Create import configuration

By means of an import configuration, you can create an import job which effects the respective import.

1. In the main view, select the import source for which you would like to configure the import.
2. Click on the menu item *Configuration Import* in the toolbar.
3. Select the menu item *Create New Import Configuration* from the context menu.

Create import job for XML import

Tab Details

In this tab, you can enter the basic information about the [XML](#) import for Call Director customer surveys.

×

<Details\*Import OptionsSchedule>

ⓘ Help

Basic Information

Name\*

Call Director customer survey

Description

Import object type\*

Call Director customer survey

XSLT\*

Call Director customer survey

Save

Reset

Fig. 49: Import configuration - Tab Details for the import of Call Director customer surveys

Name	Enter the name of the import job.
Description	Enter an optional description of the import job.
Import object type	Select the import object type <i>Call Director customer surveys</i> from the drop-down list.
XSLT	From the drop-down list, select the <a href="#">XSLT</a> mapping file that you have created previously in the XSLT Management module module.

Tab Import Options

In this tab, you can define according to which criteria objects are supposed to be created and deleted. In addition, you can define stop criteria for the import.

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. 50: Import configuration - tab Import Options

### Group field Create and Delete Objects

<i>Create object with unknown import key</i>	Select whether new sets of data can be imported and created or whether only existing sets of data are supposed to be refreshed. <input checked="" type="checkbox"/> = New sets of data can be created. <input type="checkbox"/> = No new sets of data.
<i>Delete object without imported import key</i>	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. <input checked="" type="checkbox"/> = Sets of data from other imports are deleted. <input type="checkbox"/> = Sets of data from other imports are not deleted. <b>NOTICE!</b> In the event of an error during the import, the function is deactivated automatically, i. e. no sets of data are deleted. <b>NOTICE!</b> Manually created sets of data are not deleted.
<i>Update phones without import key if the names of the phones are the same</i>	Select whether existing phones can be imported and updated if they do not have an import key but the phone name is known. <input checked="" type="checkbox"/> = Phone data can be updated. <input type="checkbox"/> = Phone data cannot be updated.

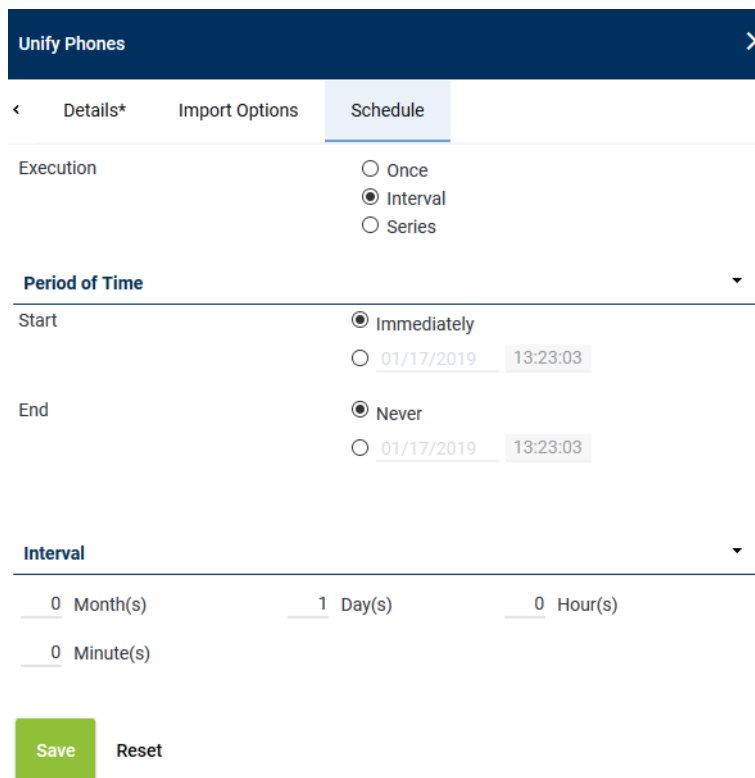
### Group field Stop Criteria

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

### Tab Schedule

In this tab, you can configure the 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) 1 Day(s) 0 Hour(s)  
 0 Minute(s)

**Save** Reset

Fig. 51: Tab Schedule

Select how often the job is supposed to be executed.

<i>Execution</i>	<ul style="list-style-type: none"> <li>• <i>Once</i> Select this option if the job is supposed to be executed only once and started on the date which has been defined in the section <i>Period of Time</i>.</li> <li>• <i>Interval</i> The job is repeated in intervals as defined in the group field <i>Interval</i>.</li> <li>• <i>Series</i> The job is repeated on serial dates as defined in the group field <i>Series</i>.</li> </ul>
------------------	--



If an import 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, see administration manual *System Configuration Notifications module*.

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

If the failed job is a job of the execution type *Once*, you have to initiate the job manually once again, after eliminating the underlying cause for the failure. Otherwise the job is not executed again.

### Group field Period of Time

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

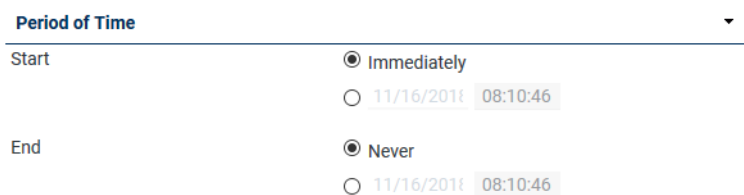




Fig. 52: Schedule - Period of Time

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

### Group field Interval



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

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

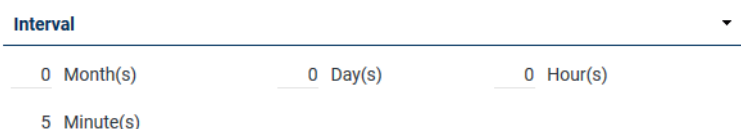


Fig. 53: Schedule - Interval

You can define the interval arbitrarily. Enter the values directly into the entry fields via the keyboard.



### Group field Series



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

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

**Series** ▼

Repeat

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

Fig. 54: Schedule - Series

<b>Repeat</b>	Days on which the job is supposed to be executed.
	<ul style="list-style-type: none"> <li>• <i>Daily</i> The job is repeated daily.</li> <li>• <i>Weekly</i> The job is repeated on the selected days. You can select one or several weekdays.</li> <li>• <i>Monthly</i> The job is repeated on the selected days. You can either select particular dates or certain days. See <a href="#">chapter "Configure monthly repetition on fixed dates", p. 49</a> and <a href="#">chapter "Configure monthly repetition on fixed days", p. 50</a>.</li> </ul>

### Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly  
☒  + -  
☐ First  Monday

Fig. 55: Configure fixed dates

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

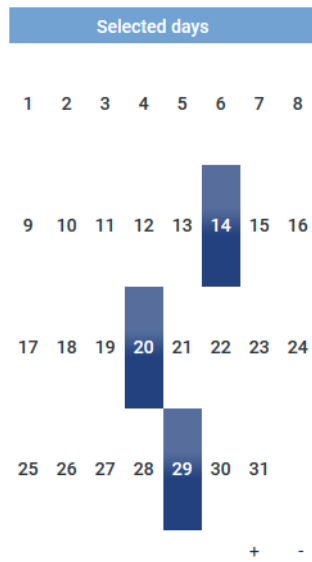


Fig. 56: Select dates

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

### Configure monthly repetition on fixed days

1. Select the lower option:

☒ Monthly  
☐ + -  
☒ First Monday

Fig. 57: Configure fixed days

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

### Save import job

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

#### 6.4.1.1.2 Assign drive

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

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

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Fig. 58: Add drive

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

## 7 Edit import job



You can edit the configuration of an import job anytime you like. The change takes effect as soon as the job is started again. When changing a job configuration while the job is active, the job is completed according to the earlier configuration.



For information about the status of a job refer to the Jobs module in the application System Monitoring, see user manual *Usage System Monitoring*.

1. In the main view, select the import job you would like to edit.  
⇒ All settings for the selected import job are displayed in the detail view.
2. Adjust all necessary settings in the tabs of the detail view, see Detail view import configuration.  
You can change tabs without buffering. The settings are not lost.
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.

## Start and stop import job

Every import job is started automatically at the point in time defined in the schedule, see Tab Schedule.

You also have the possibility to start an import job manually, if it has already been stopped or if it is paused (for the option *interval* or *series*). To start an import job manually, proceed as follows:

1. Select the import job in the main view.
2. Click on the menu item Configuration Import in the toolbar.
3. Click on the menu item *Start Job* in the context menu.

⇒ The import job is started immediately.

While an import job is active, the recording system checks whether new files are available in the import source. If new files are available, they are imported directly.

An import job ends automatically when all respective data has been imported or when a stop criterion is reached (see Group field Stop Criteria). You cannot finish or cancel an import job manually.

---

If an import 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, see administration manual *System Configuration Notifications module*.



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

If the failed job is a job of the execution type *Once*, you have to initiate the job manually once again, after eliminating the underlying cause for the failure. Otherwise the job is not executed again.

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## Glossary

### CDR

Call Detail Records are sets of data which are generated by a PBX and contain additional data such as the duration of the conversation, as well as on which line, port and end device the conversation took place.

### Cisco UCM

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

### CSV

Comma-separated values is a file format which stores tabular data in plain text form.

### ID

Identifier, ID

### LDAP

Lightweight Directory Access Protocol

### NAS

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

### PBX

Private Branch Exchange

### SfB

Skype for Business

### SFTP

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

### XML

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

### 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.