

# System Configuration Recording Planner



## Administration manual for tenants

11/8/2021

### 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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## 1 General information

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## 2 Introduction

The Recording Planner module of the application System Configuration allows recording selected phone calls and screen contents automatically. In addition, certain access commands enable you to control the automated recording manually.

Every tenant in the system can create his own recording plan which controls the recordings and consists of 1 or multiple profiles. Profiles are structured as decision trees including internal nodes which represent criteria which serve to come to a decision. The endpoints of the tree define whether a conversation will be recorded or not. See [chapter "Functionalities and terms", p. 7](#)

Open the Recording Planner module by clicking on the menu item *Recording Planner* in the navigation bar of the System Configuration.

2 sub-menu items are available:

- Compliance module  
Create your recording plan here if you use neo without INSPIRATIONneo.
- Quality Management module  
Create your recording plan here if you use INSPIRATIONneo.

Depending on the purpose of the recording, a recording plan can and/or must be created in both modules. See [chapter "Analysis of the recording plans", p. 12](#).

You can define a retention period (TTL) for the recordings. See [chapter "Create/Edit action node configuration", p. 40](#). For additional data and evaluated agent sessions a longer retention period can be configured. See [chapter "Configure differing retention period", p. 70](#).



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

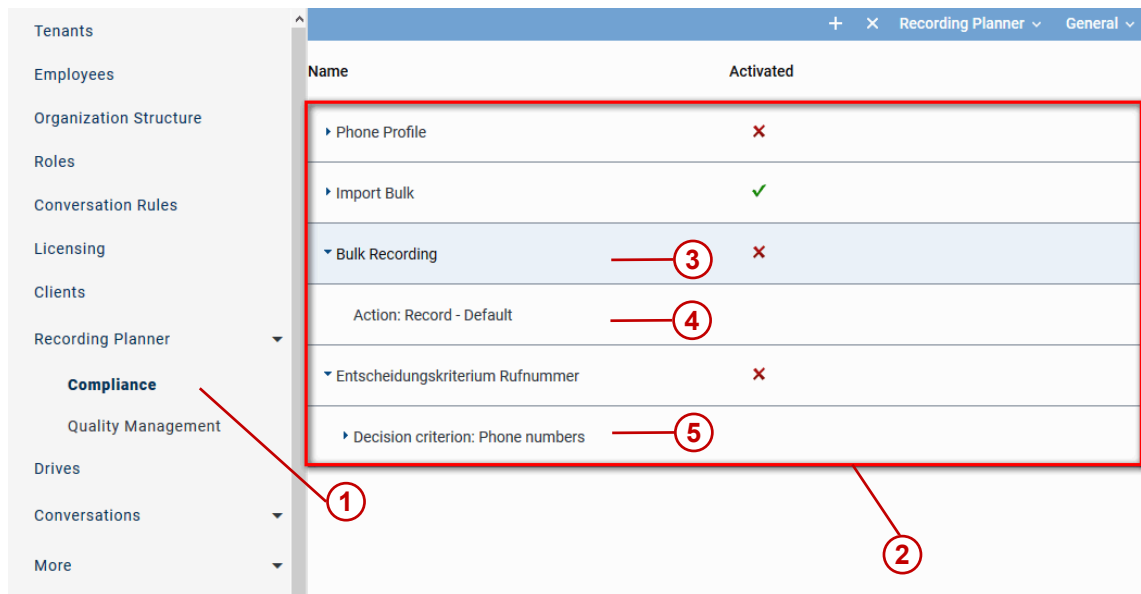


Fig. 1: Overview

1	Module	Modules of the Recording Planner module (Compliance module and Quality Management module)
2	Recording plan	Consists of one or several profiles.
3	Recording profile	Contains either a profile action node or a profile decision node.
4	Profile action node	Endpoints of the decision tree.
5	Profile decision node	Checking the entered criteria.










By clicking on the icon ▶ or ▼ you can hide or display the levels of the tree structure.

The Recording Planner module of the application System Configuration allows recording selected phone calls and screen contents automatically. In addition, certain access commands enable you to control the automated recording manually. Every tenant in the system can create his own recording plan which controls the recordings and consists of one or several profiles. Profiles are structured as decision trees including internal nodes which represent criteria which serve to come to a decision. The endpoints of the tree define whether a conversation will be recorded or not.

A recording plan can be created in the Compliance module as well as in the Quality Management module. The compliance recording plan is intended for all recordings which are not meant to be evaluated in the INSPIRATION<sub>neo</sub>. The quality management recording plan (QM recording plan) is intended for recorded agent sessions which are supposed to be evaluated with INSPIRATION<sub>neo</sub>.

The compliance recording plan and the QM recording plan can run on their own if only one of them is active. If both of them are active, the compliance recording plan is checked first. If the last action node in the compliance recording plan is *record* or *don't record but continue*, the QM recording plan is checked in sequence as well since there is the possibility to record a session in addition to the actual recording. If the last action nodes have been configured as *don't record* or *record but delete*, then the QM recording plan is not checked!

The recorded data may 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 via phone, and screen video
Calls with video		Call	Audio and video
SMS		SMS/SDS	SMS/SDS text
SDS		SMS/SDS	SMS/SDS text
Chat messages		Chat	Chat text

Tab. 1: Conversation types

In general, you have to distinguish between *conversation* and *session*.

- Conversation refers to the entire call from the moment it is answered to the end of the call, regardless of internal transfers. If a consultation is initiated, though, then the consultation is a proper conversation.
- A session is a section of a conversation in which one particular agent is active. Pausing the call (e. g. because of a consultation), does not finish this session. The session is not divided into 2 sessions. The consultation or transmitting created at least one new session of its own. For each involved agent who is supposed to be recorded according to the recording plan a proper session is created. I. e. a session is a recording section referring to a certain agent.



Even after deleting individual sections of recordings, all formats that the recording originally contained will be displayed.

Example 1:

Agent 1 (A1) talks to customer 1 (C1) and transmits the call to agent 2 after having consulted agent 3. The recording plan says that the calls of all agents are supposed to be recorded. 2 conversations and 4 sessions are created.

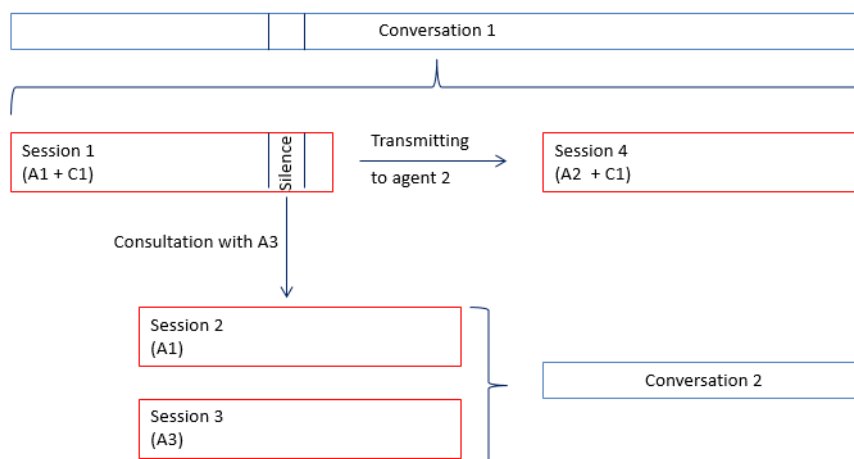


Fig. 2: Example 1

Example 2:

Agent 1 (A1) talks to customer 1 (C1) and transmits the call to agent 2 after having consulted agent 3. The recording plan says that only the calls of agent 1 and agent 2 are supposed to be recorded. 2 conversations and 3 sessions are created.



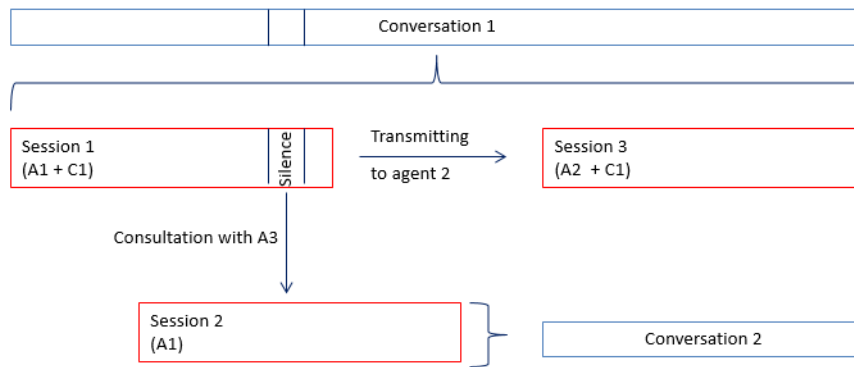


Fig. 3: Example 2

*Call*, *chat*, *text message* and *work item* are differentiated in recording.

- *Call*: Conversation by phone. Any combination of call and [video recording](#) can be selected.
- *Chat*: Conversation on a chat platform.
- *Text message*: Conversation on a short message service ([SMS](#)) or short data service ([SDS](#)).
- *Work item*: Screen activity **without** a reference to a call.

Every tenant has at least one own recording plan in the system. A recording plan consists of one or several profiles.

In every profile, there are 2 different types of nodes:

- In the so-called profile decision nodes, the criteria are checked. Depending on whether the criterion is fulfilled, a branch is selected until eventually reaching an endpoint.
- The profile action nodes are the endpoints of the decision tree. In the simplified outline, you can see that not only decisions in favor or against recording are made in the action nodes but decisions concerning topics beyond that, too, for instance with regards to delegating the decision of whether to keep the recording.

The Recording Planner module checks the decision nodes for the further course of action.

There are always only 2 possibilities to execute the plan:

- Yes, the criterion has been fulfilled (in the image *yes*)
- No, the criterion has not been fulfilled (in the image *no*)

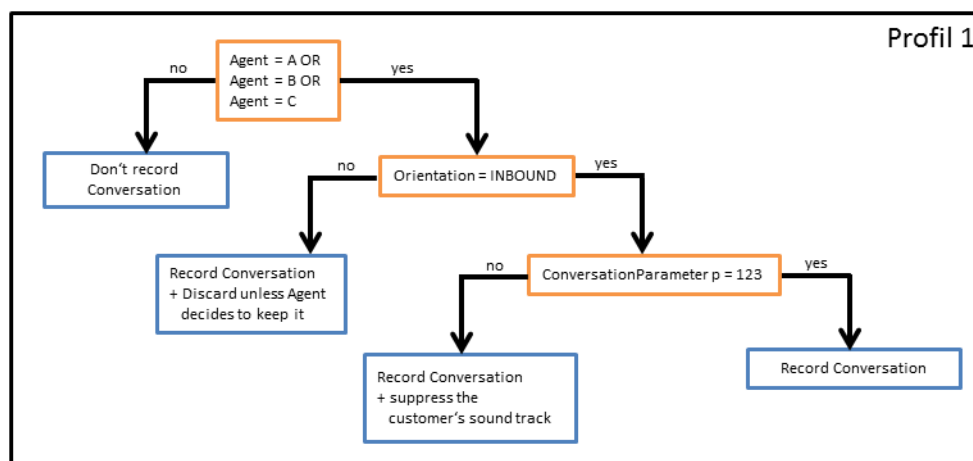


Fig. 4: Example profile

The criteria of a profile are checked until an action node is reached which executes a definite action. There are 4 different types of action nodes:

<i>Record</i>	All conversations are recorded automatically. If required, additional options can be configured. This action node allows checking the QM recording plan. See <a href="#">chapter "Action node configuration Record", p. 41</a> .
<i>Don't record</i>	No conversation is recorded. However, a recording can be started via external recording control. If required, additional options can be configured. No further profile will be checked. See <a href="#">chapter "Action node configuration Don't record", p. 44</a> .
<i>Record and delete</i>	The conversation is recorded but will be deleted at the end. Deletion can be prevented by means of external recording control by making the explicit decision to keep the recording. If required, additional options can be configured. No further profile will be checked. See <a href="#">chapter "Action node configuration Record and Delete", p. 46</a> .
<i>Don't record but continue</i>	No conversation is recorded. However, a recording can be started via external recording control. If required, additional options can be configured. The action nodes allows checking another (following) profile or another recording plan, though. See <a href="#">chapter "Action node configuration Don't record but continue", p. 49</a> .

### Exemplary profile AND/OR operation

All profile nodes within a recording profile (*Recording 1*) are AND operations. By creating and activating a second recording profile (*Recording 2*) an OR operation is created. The recording profiles are processed from top down.

+ × Recording Planner General	
Name	Activated
▼ Recording 1	✓
▼ Decision criterion: Phone numbers	
+ Action: Don't record - API ClientComm	
▼ - Decision criterion: Additional data	
+ Action: Record - Record1	
- Action: Don't record - API ClientComm	
▶ Recording 2	✓

Fig. 5: Exemplary profile AND/OR operation

Recording profile *Recording 1* is processed as follows:

- Everything is recorded except calls in while the saved phone numbers are involved. However, a recording can be started by means of a client application.
- The decision to not record a certain phone number is revoked when the defined additional data is recognized. However, a recording can be discarded by means of a client application.

### Wildcards

In the Recording Planner module, the wildcards "\*" and "?" can be used when configuring the following decision criteria:

- Phone number
- Chat ID
- Additional data

You can use the wildcards "\*" and "?" as follows:

- The question mark stands for exactly 1 arbitrary character.
- The asterisk stands for an arbitrary sequence of characters or for 1 character at a minimum.

Example:

Search entry	Exemplary results
?bc	abc, bbc, cbc etc.
*bc	abc, aabc, bbc, babaebc, cbc etc.
060215001???	060215001100, 060215001222, 060215001561
060215001*	0602150010, 06021500121, 060215001100

## Analysis of the recording plans

There are 2 different types of recording plans:

- The compliance recording plan

This plan records the complete conversation from the beginning until the end. All end devices can be recorded.

- The quality management recording plan (QM recording plan)

This plan records individual sessions. This enables users to go into the details of a conversation. Only sessions which can be assigned to an agent can be recorded.

Upon delivery, the Compliance module already includes a profile which records all conversations.

### Mode of operation of the recording plans

Upon the start of a conversation for a tenant, the compliance recording plan of this tenant determines whether this conversation is supposed to be recorded. This is the case if the path through the compliance recording profile ends in an action node of the type *Record* or *Record and delete*.

In this case, the recording starts and the QM recording plan of the tenant is consulted whether the recording is supposed to be available for a QM session, too. If the action node allows external recording control (see [chapter "Area of application of the external control", p. 13](#)), these control signals will be considered during the recording.

If the path through the compliance recording profile ends in an action node of the type *Don't record*, the conversation will not be recorded. If the action node allows external recording control, though, then these control signals will be considered throughout the conversation.

If the path through the compliance recording profile ends in an action node of the type *Don't record but continue*, the QM recording profile of the tenant determines whether the conversation is to be recorded for an agent session. If this is the case, the recording will be initiated, otherwise not. The recording can be stopped via external control if required.



The compliance recording plan takes absolute precedence over the QM recording plan. If the terminal action node of a compliance recording plan allows deletion via external control and the agent decides to delete the conversation, then this conversation will not be available for QM anymore, even if it had been recorded according to the QM recording plan.

In this case, the compliance recording plan is pursued exactly one time. Depending on the terminal action node, the QM recording plan will be applied exactly once, too.

When going through the recording plan once again, the odds are that a different type of action node is reached. For the compliance recording profile, the action node's decision retroactively concerns the current conversation. This implies that for the previous conversations the decision of the previously reached action node applies. For the QM recording profile, the action node's decision retroactively concerns the current session.

In the event of external recording control, the area of application of the control signals has to be defined explicitly (see [chapter "Area of application of the external control", p. 13](#)). In general, it is the last decision which applies for external control: If an agent has sent a keep signal via the external control, he or she can revoke this decision by sending a delete signal. And this decision can be revoked by sending another keep signal and so on.

## 5

## Area of application of the external control

The compliance recording plan defines which conversations are to be recorded. If the external control signals applied to the entire conversation, this could have the unintentional result that the control signal of one participant influences the recording of a section of the conversation that he or she has not participated in. Here are 3 examples to clarify the differences:

Example 1:

The compliance recording plan defines that every conversation has to be recorded and allows the deletion via external control. Agent A first talks to customer C and then forwards the call on to agent B. Agent B sends a deletion signal:

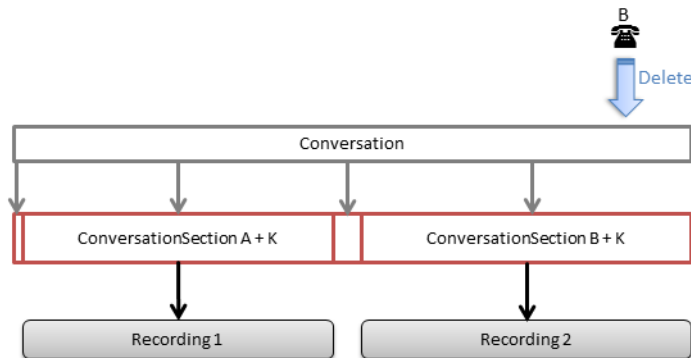


Fig. 6: External control 1

This is where the area of application comes in to define whether the signal sent by agent B applies to the entire conversation or only to recording 2.

Example 2:

The compliance recording plan defines that every conversation has to be recorded and allows starting and stopping the recording via external control. Agent A first talks to customer C and stops the recording during the conversation. Then he forwards the call to agent B:

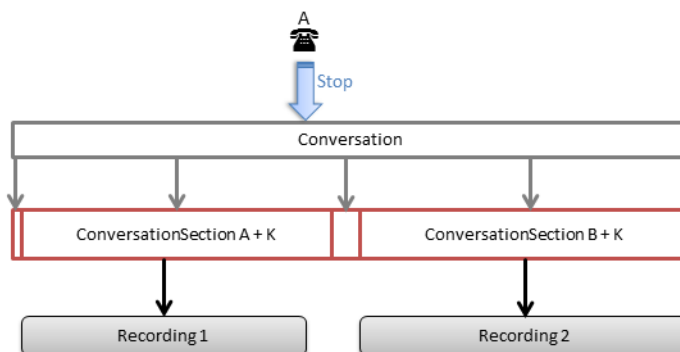


Fig. 7: External control 2

Now the question is whether the stop signal applies to the entire conversation or only to the section of the conversation which is displayed for agent A (Recording 1).

Example 3:

The compliance recording plan defines that every conversation has to be recorded and allows starting and stopping the recording via external control. Agent A first talks to customer C and then forwards the call on to agent B. Agent B stops the recording and starts it again. Eventually, agent B sends a deletion signal.

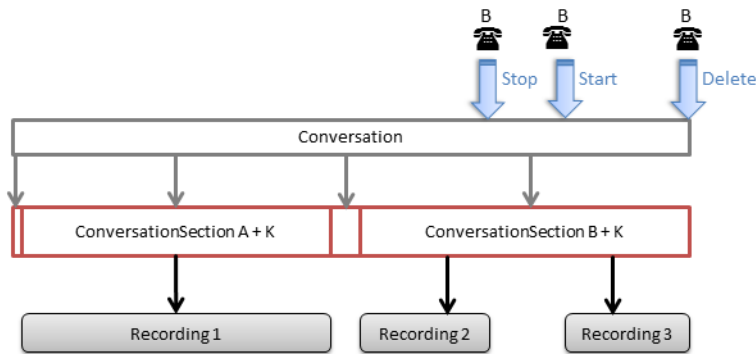


Fig. 8: External control 3

Again, it is not clear to which section of the conversation the deletion signal is supposed to apply. To the entire conversation, to the section of agent B (Recording 2 and 3) or to the last start stop interval.

The same situation arises in the QM recording plan: There, the control decision either applies to the agent session or to the last start stop interval. In the QM recording plan, the control decisions never apply to the entire conversation, though.

The examples show that the customer must have the possibility to define the area of application for external control in the compliance recording plan as well as in the QM recording plan. For a detailed description of the setting possibilities see [chapter "External control", p. 63](#).

## 6

## Main view

In the main view, all saved profiles are displayed.

+ × Recording Planner ▾ General ▾	
Name	Activated
▶ Phone Profile	×
▶ Import Bulk	✓
▶ Bulk Recording	×
▼ Entscheidungskriterium Rufnummer	×
▼ Decision criterion: Phone numbers	
▼ + Decision criterion: Organization unit	
+ Action: Don't record but continue - Default	
- Action: Don't record but continue - Default	
- Action: Record - Default	

Fig. 9: Recording Planner - main view

The following information is displayed in the main view:

<b>Name</b>	Name of the profile Here, you can see the binary tree structure of the profile. The arrows allow you to open the next level.
<b>Activated</b>	Here, you can see whether the profile is active or inactive. ✓ = The profile is active. × = The profile is not active.



The compliance recording plan has a preset default recording profile.

The QM recording plan does not have a preset profile.



## 6.1

## Toolbar

The toolbar offers the following functions.

+ × Recording Planner ▾ General ▾
-----------------------------------

Fig. 10: Toolbar

	Create/Duplicate profile	Creates or duplicates a profile. See <a href="#">chapter "Create/Duplicate profile", p. 19.</a>
	Delete profile	Deletes the selected profile.
Recording Planner	Create/Edit action node configuration	Creates or edits an action node configuration. See <a href="#">chapter "Create/Edit action node configuration", p. 40.</a>

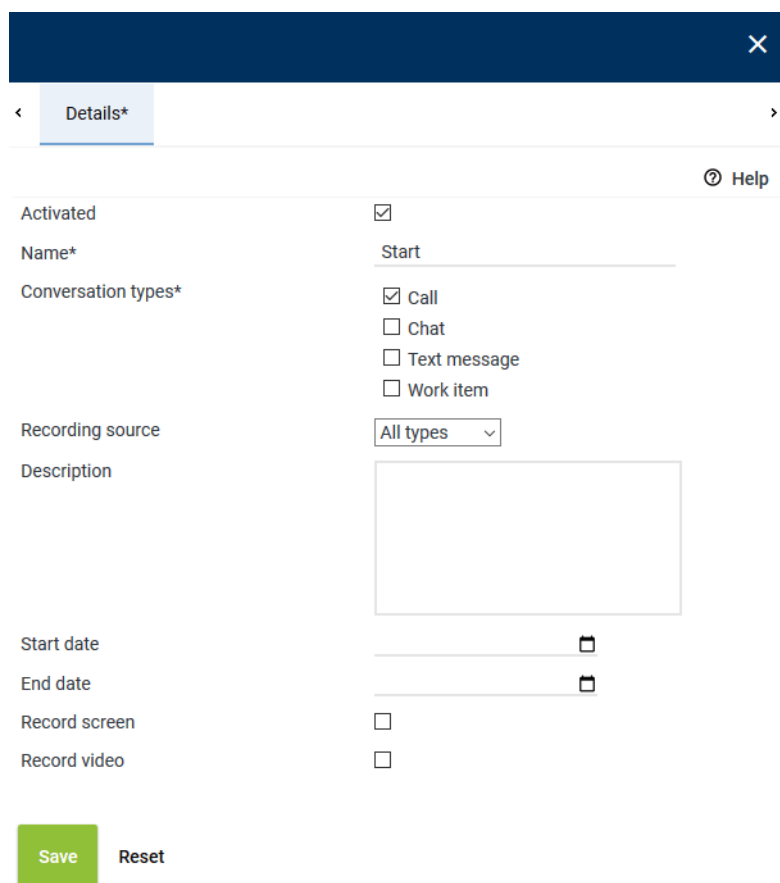
	<i>External control</i>	Opens an option to the settings of the external controls. See <a href="#">chapter "External control"</a> , p. 63.
	<i>DTMF sequences</i>	Opens a window for the configuration of the DTMF sequences. See <a href="#">chapter "Define DTMF sequences"</a> , p. 65.
	<i>Import recording filter</i>	See <a href="#">chapter "Import recording filter"</a> , p. 66.
	<i>Edit recording filter</i>	See <a href="#">chapter "Edit recording filter"</a> , p. 68.
	<i>Configure differing deletion date for meta data</i>	See <a href="#">chapter "Configure differing retention period"</a> , p. 70.
	<i>Rank higher</i>	Increases the priority of the profile.
	<i>Rank lower</i>	Decreases the priority of the profile.
<i>General</i>	<i>General Help</i>	By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened.
	<i>Module Help</i>	By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened.



For detailed descriptions of the default functions such as *Search*, *Print*, *Adjust table* or *Help* refer to the user manual for system providers *General information - System Configuration*.



Here, you can display and edit detailed information about the selected profile. Action nodes and decision nodes have different detail views. Their content is described in [chapter "Function Replace with", p. 20](#).



Details\*

Activated ☒

Name\* Start

Conversation types\* ☒ Call ☐ Chat ☐ Text message ☐ Work item

Recording source All types

Description

Start date

End date

Record screen ☐

Record video ☐

Save Reset

Fig. 11: Detail view - Recording Planner (example)

In the tab *Details*, you can enter information about the created or selected profile.

<b>Activated</b>	<p>Activate or deactivate the profile by means of the check box.</p> <p><input checked="" type="checkbox"/> = Profile has been activated.</p> <p><input type="checkbox"/> = Profile has been deactivated.</p>
<b>Name</b>	<p>Enter the name of the profile.</p>
<b>Conversation types</b>	<p>Here, you can select one or several conversation types. The following options are available:</p> <ul style="list-style-type: none"> <li>• Call</li> <li>• Chat</li> <li>• Text message</li> <li>• Work item</li> </ul> <p>Activate or deactivate the conversation type via the check box.</p> <p><input checked="" type="checkbox"/> = Option has been activated.</p> <p><input type="checkbox"/> = Option has been deactivated.</p>
<b>Recording source</b>	<p>Here, you can select the recording source. The following options are available:</p>

	<ul style="list-style-type: none"> <li>• All types Select this option if all recording sources are supposed to be considered.</li> <li>• Only import Select this option if only imported recordings are supposed to be considered.</li> <li>• No import Select this option if no imported recordings are supposed to be considered.</li> </ul>
<i>Description</i>	Here, you can enter a description for the profile.
<i>Start date</i>	Enter the date when the profile is supposed to be activated. You can enter the date directly via the keyboard or via the icon.
<i>End date</i>	Enter the date when the profile is supposed to be deactivated. You can enter the date directly via the keyboard or via the icon.
<i>Record screen</i>	Activate or deactivate screen recording by means of the check box. <input checked="" type="checkbox"/> = The screen is recorded. <input type="checkbox"/> = The screen is not recorded. This option is only available for the type <i>Call</i> .
<i>Record video</i>	Activate or deactivate camera recording by means of the check box. <input checked="" type="checkbox"/> = Camera video is recorded. <input type="checkbox"/> = Camera video is not recorded. This option is only available for the type <i>Call</i> .

Depending on the type of the decision node or action node you have selected, you can edit different content in the detail view.



Inform your system provider that the following actions have to be carried out in the System Configuration so that chat recording is started:

- Integrations module - deactivate integration
- Recording Architectures module - deactivate recording architecture
- Recording Architectures module - activate recording architecture
- Integrations module - activate integration

## 8 Create/Duplicate profile

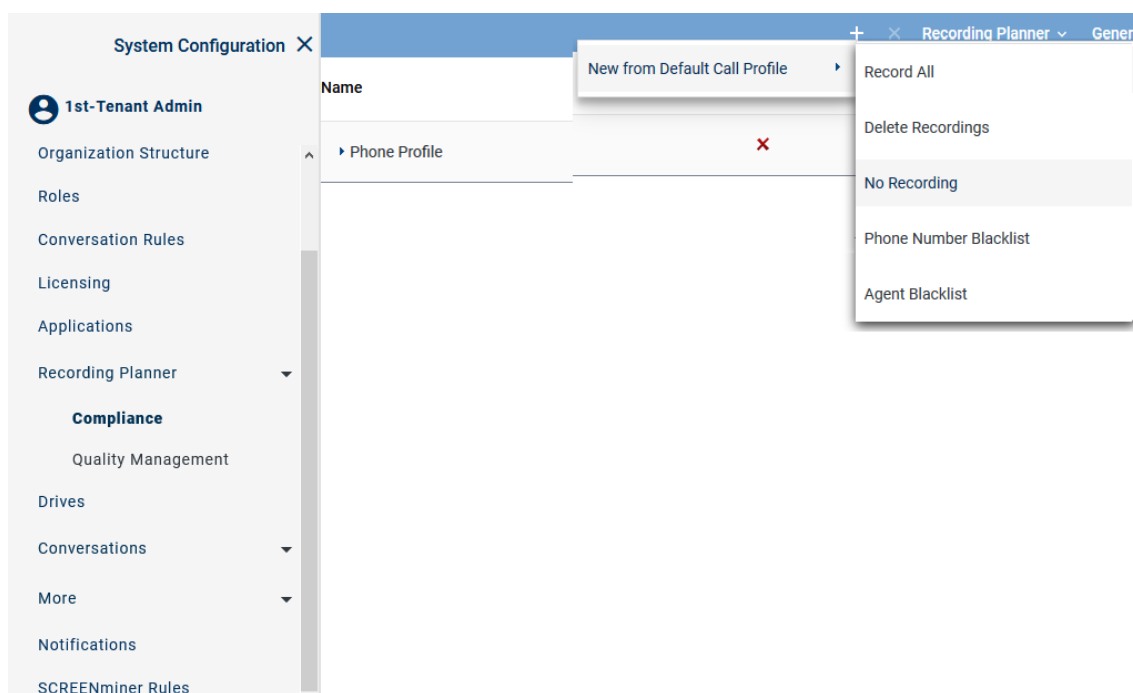



Fig. 12: Create/Duplicate profile

1. In the main view, click on the icon  (Create/Duplicate profile).
2. Select one of the following options:

<i>New from Default Call Profile</i>	A new profile for calls is created.
<i>Duplicate Profile</i>	The selected profile is duplicated and appears in the main view under the name <i>Clone of X</i> . In your case, the X is replaced with the name of the profile you have selected.

Upon creating a new profile, the following further setting options are available after the first selection:

<i>Record Everything</i>	The action <i>Record</i> is the target action.
<i>Delete recordings</i>	The action <i>Delete Recordings</i> is the target action.
<i>No Recording</i>	The action <i>No Recording</i> is the target action.
<i>Phone Number Blacklist</i>	The action <i>Don't Record Certain Phone Numbers</i> is the target action.
<i>Agent Blacklist</i>	The action <i>Don't Record Certain Agents</i> is the target action.

Before creating a new profile, take note of the explanations in [chapter "Functionalities and terms", p. 7](#).

## Function Replace with

This function allows replacing a node with an action node or with a decision node. The function is only active if you have selected a decision node or an action node of a deactivated profile.

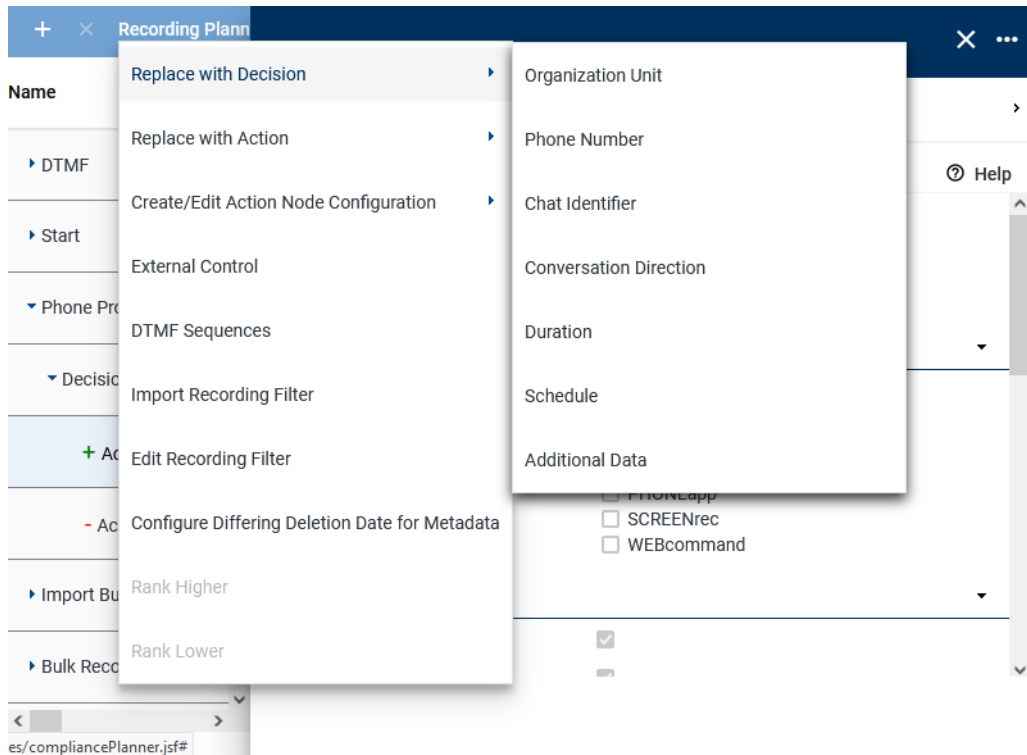


Fig. 13: Replace with (example)

1. In the main view, select the node you would like to replace.
2. In the toolbar, click on the menu item *Recording Planner* > *Replace with decision* to replace a decision criterion or on the menu item *Recording Planner* > *Replace with action* to replace an action criterion.
3. Select either a decision criterion or an action criterion.
4. Adjust the respective settings in the detail view.
5. To save the entries, click on the button *Save* in the detail view.  
To reset the entries, click on the button *Reset* in the detail view.

The following decision criteria are available:

- Organization unit  
See [chapter "Organization unit", p. 21](#).
- Phone number  
See [chapter "Phone number", p. 24](#).
- Chat identifier  
See [chapter "Chat ID", p. 30](#).
- Conversation direction  
See [chapter "Conversation direction", p. 32](#).
- Duration  
See [chapter "Duration", p. 32](#).
- Schedule  
See [chapter "Schedule", p. 33](#).
- Statistics (only in the Quality Management module)  
See [chapter "Statistics", p. 36](#).

- Additional data  
See [chapter "Additional data"](#), p. 35.



A decision criterion is deemed fulfilled if at least one criterion in one of the existing group fields is fulfilled. If the decision criterion is fulfilled, the positive action node (+) is applied.

Available action criteria are:

- Record
- Don't record
- Record and delete
- Don't record but continue

In addition to the default nodes, you can select all individually created action nodes.



When adding a decision node, you can continue to add other nodes.

When you add an action node, this will be the endpoint of the recording plan.

## 9.1

### Organization unit

Here, you can define decision criteria which refer to the assignments in your organization units.

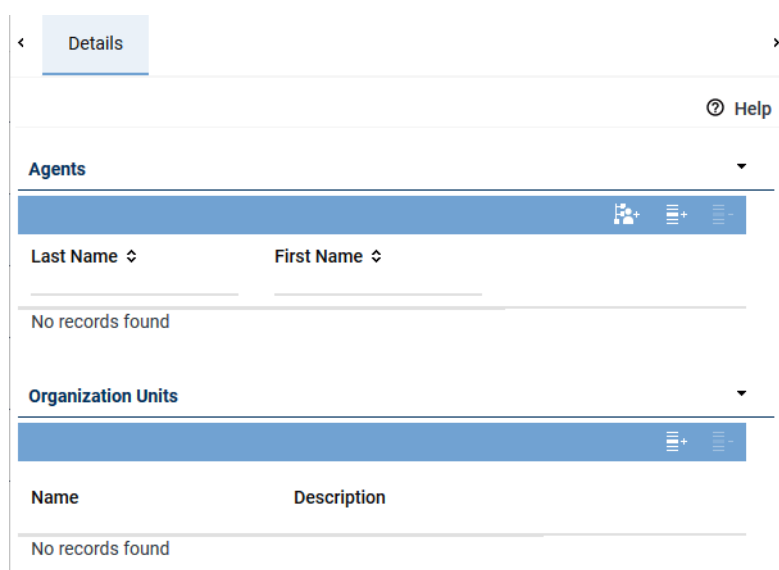



Fig. 14: Organization unit - details

#### Group field Agents:

Add those agents for whom the decision criterion is supposed to be valid.



You can only select agents of whose data you have access to.

1. To assign an agent, click on the icon  (Add).




Fig. 15: Agents (example)


2. Select one or several agents from the list.  
To select several agents or to revoke the selection, click on this line while holding the [Ctrl] key down.

Add Agents					
Employee Number ↕	First Name ↕	Last Name ↕	Login Name ↕	Date of Entry ↕	Date of Birth ↕
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			
Rows per page 20 1 - 10 of 10					
					Add Cancel

Fig. 16: Add own agents

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

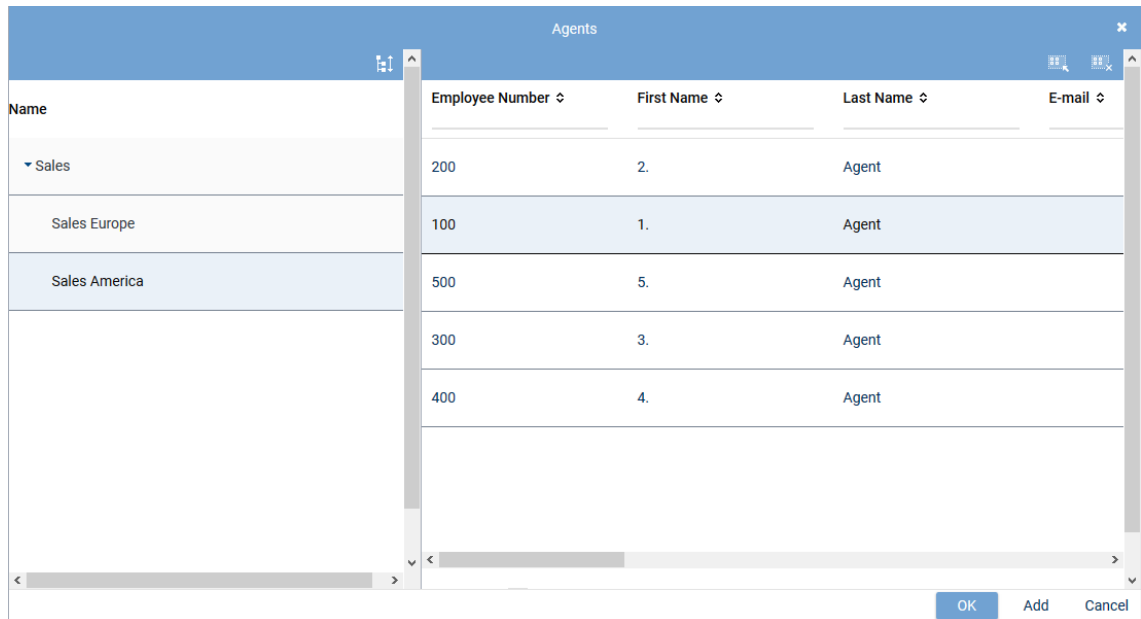
#### Add agents from organization structure

1. To assign agents from the organization structure, click on the icon  (Add from organization structure).

	
Last Name ↕	First Name ↕
No records found	



Fig. 17: Agents

2. Click on the name of the organization unit in the left window.



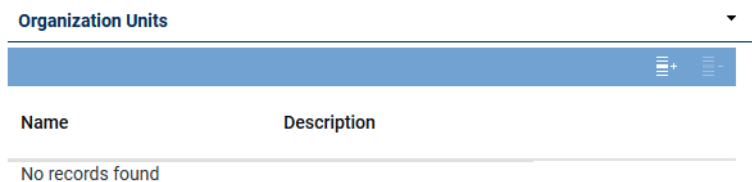
Name	Employee Number	First Name	Last Name	E-mail
▼ Sales	200	2.	Agent	
Sales Europe	100	1.	Agent	
Sales America	500	5.	Agent	
	300	3.	Agent	
	400	4.	Agent	

Fig. 18: Add agents from organization structure

3. Select one or several agents from the list in the right window.  
To select several agents or to revoke the selection, click on this line while holding the [Ctrl] key down.  
To select all agents, click on the icon  (*Select all*).  
To deselect all marked agents, click on the icon  (*Deselect all*).
4. To add the selected agents and leave the window open for further adjustments, such as adding more agents from other organization structures, click on the button *Add*.  
To add the selected agents and close the window, click on the button *OK*.  
To discard the selection and close the window, click on the button *Cancel*.



### Group field Organization Units:

Add those organization units for which the decision criterion is supposed to be valid.



Name	Description
No records found	

Fig. 19: Organization units

1. To add an organization unit, click on the icon  (*Add*).  
⇒ The window *Organization Units* appears.
2. To remove the organization unit, select it and click on the icon  (*Remove*).
3. Select the organization unit you would like to add and click on the button *Add*.  
⇒ The organization unit appears in the detail view.

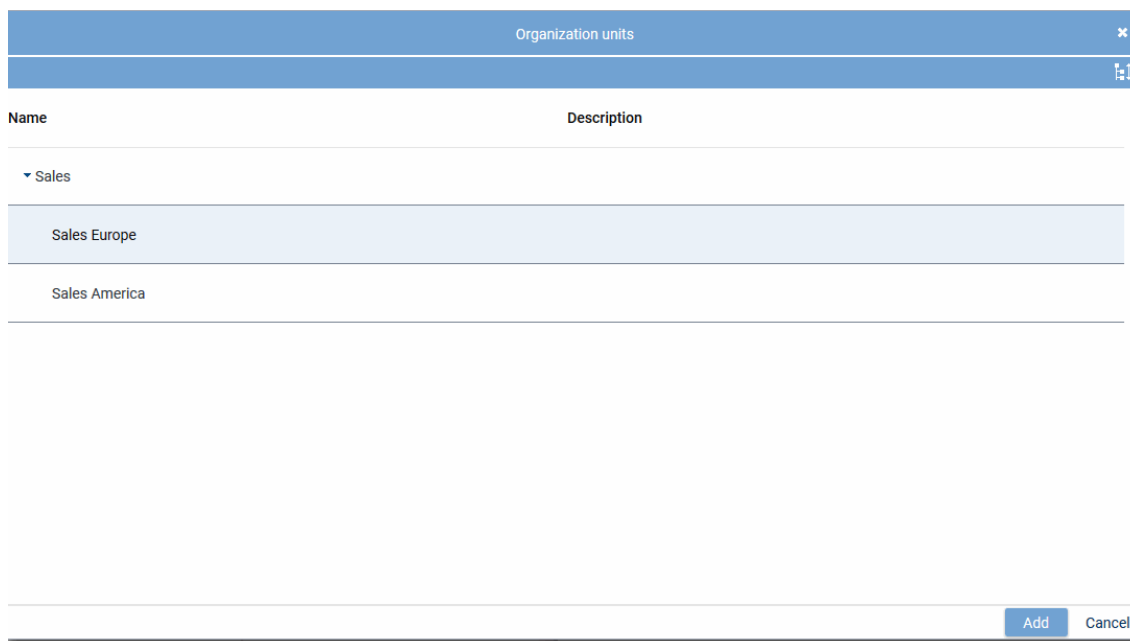


Fig. 20: Add organization unit

4. Select the organization unit you would like to add and click on the button *Add*.  
⇒ The organization unit appears in the detail view.
5. To cancel the process and discard the settings, click on the button *Cancel*.

## 9.2

### Phone number

Here, you can define decision criteria which refer to the selected phone numbers.

The type of the phone number allows differentiating it precisely. The following options are available:

- Participant phone number
- Calling party phone number
- Called party phone number
- 1st-connected phone number

There is a difference between internal phone numbers (*Extensions*) and external phone numbers.

You can use the wildcards “\*” and “?” as follows:

- The question mark stands for exactly 1 arbitrary character.
- The asterisk stands for an arbitrary sequence of characters or for 1 character at a minimum.

Example:

Search entry	Exemplary results
?bc	abc, bbc, cbc etc.
*bc	abc, aabc, bbc, babaebc, cbc etc.
060215001???	060215001100, 060215001222, 060215001561
060215001*	0602150010, 06021500121, 060215001100



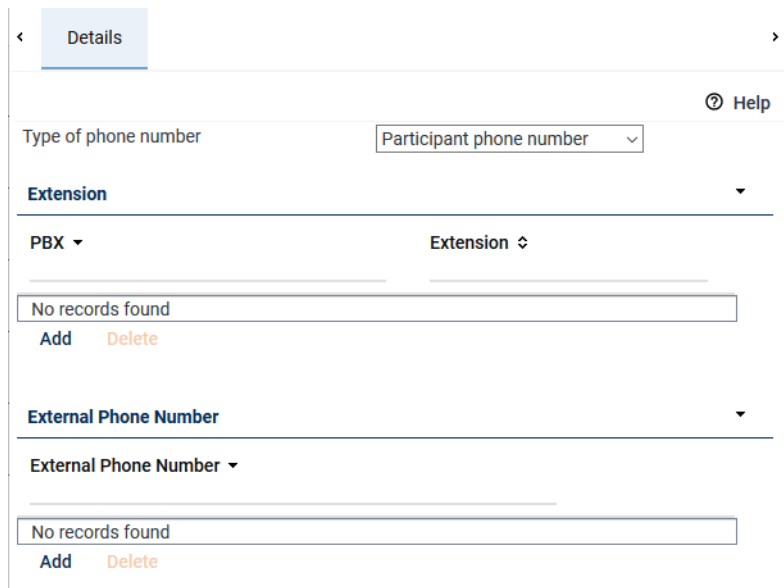


Fig. 21: Phone number - details

1. In the field *Type of phone number*, select an option in the drop-down list.
2. Enter a phone number in at least one of the group fields which is supposed to differentiate the criterion.

### Group field Extension

Add internal phone numbers (*extensions*) for which the decision criterion is supposed to be valid.



In a multi-tenant system, make sure that you have assigned all extensions of the respective **PBX** instances to the tenants in advance. If this is not the case, the configuration will not be accepted.

1. To add an extension, click on the button *Add*, see [chapter "Add extensions", p. 25](#).
2. You can delete the extension by clicking on the button *Delete*.

### Group field External Phone Number

Add external phone numbers for which the decision criterion is supposed to be valid.

1. To add an external phone number, click on the button *Add*, see [chapter "Add external phone number", p. 28](#).
2. To delete an external phone number, click on the button *Delete*.

#### 9.2.1 Add extensions

1. To add extensions, click on the button *Add* in the group field *Extensions*.  
⇒ The following window appears:

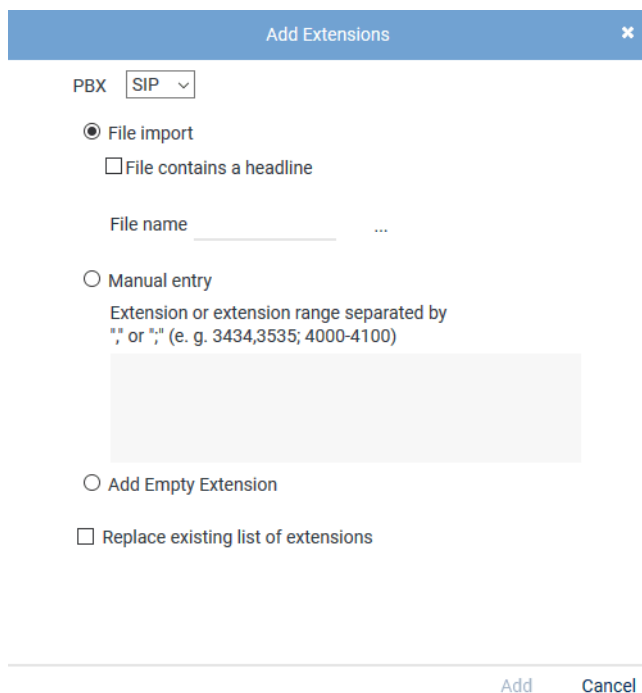




Fig. 22: Add extensions

2. From the drop-down list in the field *PBX*, select the PBX from which you would like to add extensions.
3. Select one of the following options:

<i>File import</i>	<p>Select the option to import extensions from an existing file and add them to the table of extensions.</p> <p>The following file formats are supported:</p> <ul style="list-style-type: none"> <li>• <i>ZIP</i></li> <li>• <i>TXT</i></li> <li>• <i>CSV</i></li> </ul> <p><b>NOTICE! The maximum number of extensions in a file has been limited to 2000 for performance reasons. If more extensions are required, you can import several files.</b></p> <p><i>File contains headline</i></p> <p>Activate the option so that the structure can be recognized correctly upon importing the data.</p> <p>The file must not contain more than one column. If commas or other column separators are detected in the file, the file is considered invalid and an error message is displayed.</p> <p><i>File name</i></p> <p>To import a file, proceed as follows:</p> <ul style="list-style-type: none"> <li>• Next to <i>File name</i>, click on the button .</li> <li>• Click on the button <i>Select File</i>.</li> <li>• Select the respective file in the Explorer and click on the button <i>Open</i>.</li> <li>• Click on the button  <i>Upload File</i>.</li> </ul>
<i>Manual entry</i>	Select the option to enter extensions or extension ranges.

To import number ranges, you must enter the same number of digits for the beginning and the end of the range, e. g. 1-9, 10-99, 01-20, 001-200, 4000-5000. If the end of the range asks for several digits, you have to add zeros for the beginning of the range, e. g. 01-10, 010-100.

Enter country codes as number ranges as follows:

+4984496800-+4984496810

**NOTICE! The number of digits must be equal. Add zeros in front of digits to level up possible incongruences.**

**NOTICE! Wildcards cannot be used!**

*Add empty extensions* Here, you can add empty extensions to filter for them.

*Replace existing list of extensions* Activate the check box to replace the list of extensions.

☒ = Function has been activated; the entry replaces the extensions of the selected PBX.

☐ = Function has not been activated; the configured extensions of all PBXs remain and the new extensions are added to the selected PBX.

4. Click on the button *Add*.  
⇒ The extensions are added in the table of extensions.
5. If errors have been detected, the window *Result* appears.  
Click on the button *Display Error Report* to open the window *Error Report*. This window displays the first 100 extensions with an error including a description of the error.  
To close the window *Error Report*, click on the button *Close*.  
To close the window *Result*, click on the button *Close*.

### 9.2.1.1 Import ZIP file

1. Click on the button *Choose File*.

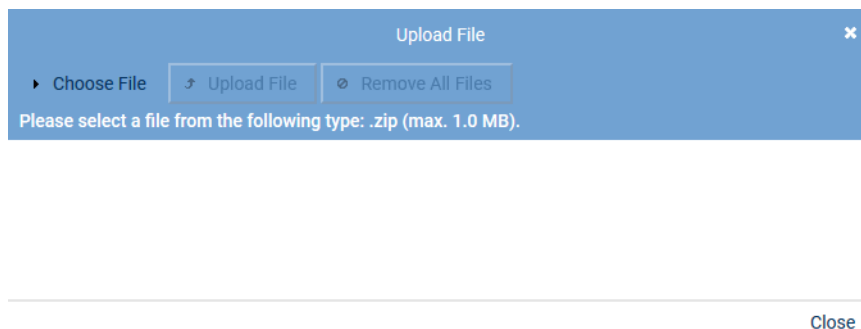


Fig. 23: Choose file

2. Select the respective file via the Explorer and click on the button *Open*.

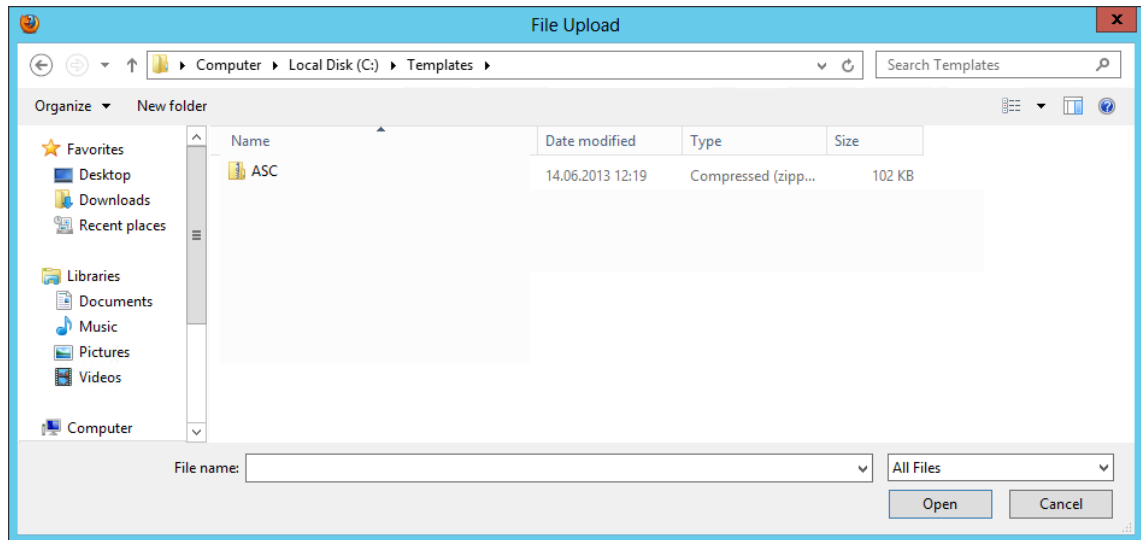




Fig. 24: Upload File

- To upload the file, click on the button  (*Upload file*) next to the file you would like to upload.

To remove a selected file from the list, click on the button  (*Remove file*) next to the file.

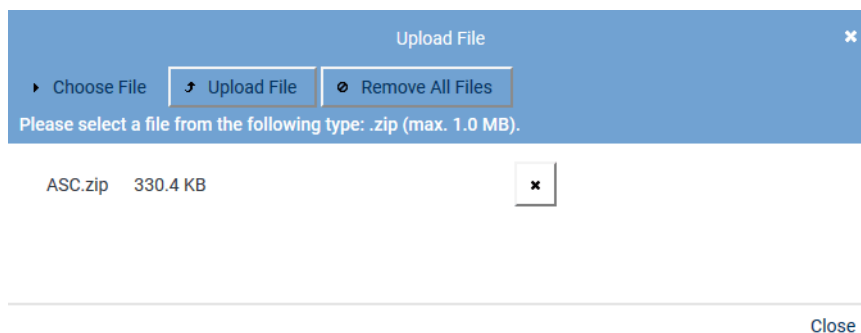


Fig. 25: Upload File

- Upon clicking on the button  (*Upload file*), the file is uploaded.

### 9.2.2 Add external phone number

- To add an external phone number, click on the button *Add* in the group field *External Phone Number*.  
⇒ The following window appears:

Add External Phone Numbers
✕

☒ File import

☐ File contains a headline

File name  ...

☐ Manual entry

Phone numbers or phone number ranges separated by ";" or "," (e. g. 3434,3535; 4000-4100)

☐ Add empty phone number

☐ Overwrite existing list of external phone numbers

Add

Fig. 26: Add external phone numbers

2. Select one of the following options:

<b>File import</b>	<p>Select the option to import extensions from an existing file and add them to the table of extensions.</p> <p>The following file formats are supported:</p> <ul style="list-style-type: none"> <li>• ZIP</li> <li>• TXT</li> <li>• CSV</li> </ul> <p><b>NOTICE! The maximum number of extensions in a file has been limited to 2000 for performance reasons. If more extensions are required, you can import several files.</b></p>
	<p><b>File contains headline</b></p> <p>Activate the option so that the structure can be recognized correctly upon importing the data.</p> <p>The file must not contain more than one column. If commas or other column separators are detected in the file, the file is considered invalid and an error message is displayed.</p>
	<p><b>File name</b></p> <p>To import a file, proceed as follows:</p> <ul style="list-style-type: none"> <li>• Next to <i>File name</i>, click on the button <span style="background-color: #f5f5f5; padding: 2px 5px;">...</span>.</li> <li>• Click on the button <i>Select File</i>.</li> <li>• Select the respective file in the Explorer and click on the button <i>Open</i>.</li> <li>• Click on the button <span style="background-color: #42a5f5; color: white; padding: 2px 5px;">↗</span> <i>Upload File</i>.</li> </ul>
<b>Manual entry</b>	<p>Select the option to enter extensions or extension ranges.</p> <p>To import number ranges, you must enter the same number of digits for the beginning and the end of the range, e. g. 1-9, 10-99, 01-20, 001-200, 4000-5000. If the end of the range asks for several digits, you have to add zeros for the beginning of the range, e. g. 01-10, 010-100.</p> <p>Enter country codes as number ranges as follows: +4984496800-+4984496810</p>

**NOTICE! The number of digits must be equal. Add zeros in front of digits to level up possible incongruences.**

**NOTICE! Wildcards cannot be used!**

*Add empty extensions* Here, you can add empty extensions to filter for them.

*Replace existing list of extensions* Activate the check box to replace the list of extensions.

☒ = Function has been activated; the entry replaces the extensions of the selected PBX.

☐ = Function has not been activated; the configured extensions of all PBXs remain and the new extensions are added to the selected PBX.

3. Activate or deactivate the check box *Replace existing list of external phone numbers*.

☒ = activated

All existing external phone numbers which have already been assigned are deleted. The newly selected external phone numbers are added.

☐ = deactivated

Existing external phone numbers which have already been assigned are kept. The newly selected external phone numbers are added.

4. Click on the button *Add*.

⇒ The external phone numbers are added to the table of external phone numbers.

5. If errors have been detected, the window *Result* appears.

Click on the button *Display Error Report* to open the window *Error Report*. This window displays the first 100 external phone numbers with an error including the description of the error.

To close the window *Error Report*, click on the button *Close*.

To close the window *Result*, click on the button *Close*.

#### See also

 Import ZIP file [▶ 27]

### 9.3

#### Chat ID

Here, you can define decision criteria which refer to selected chat IDs.



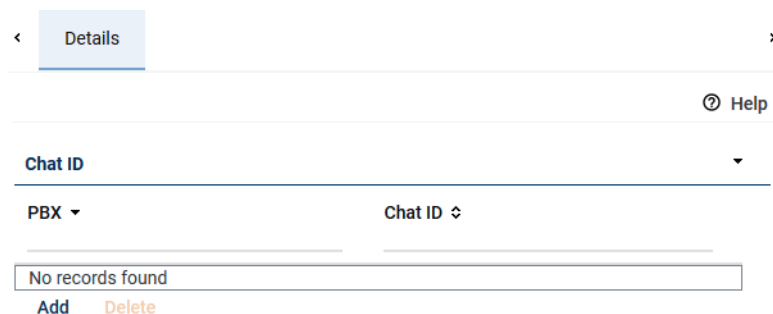
In a multi-tenant system, make sure that you have assigned all chat IDs of the respective **PBX** instances to the tenants in advance. If this is not the case, the configuration will not be accepted.

You can use the wildcards “\*” and “?” as follows:

- The question mark stands for exactly 1 arbitrary character.
- The asterisk stands for an arbitrary sequence of characters or for 1 character at a minimum.

Example:

Search entry	Exemplary results
?bc	abc, bbc, cbc etc.
*bc	abc, aabc, bbc, babaebc, cbc etc.
060215001???	060215001100, 060215001222, 060215001561
060215001*	0602150010, 06021500121, 060215001100



Details

Help

Chat ID

PBX Chat ID

No records found

Add Delete

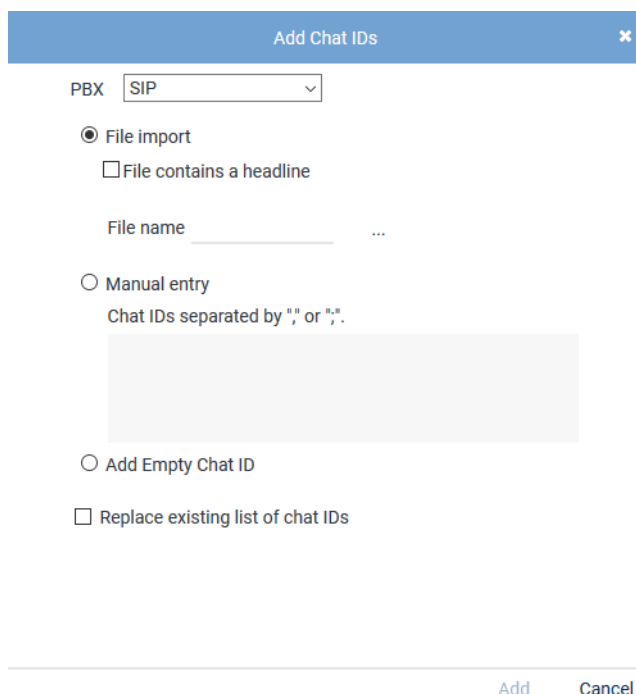
Fig. 27: Chat ID - details

### Group field Chat ID

Add chat IDs for which the decision criterion is supposed to be valid.

- To add a chat ID, click on the button *Add*.

⇒ The following window appears:



Add Chat IDs

PBX SIP

☒ File import

☐ File contains a headline

File name ...

☐ Manual entry

Chat IDs separated by ", " or "; ".

☐ Add Empty Chat ID

☐ Replace existing list of chat IDs

Add Cancel

Fig. 28: Add chat IDs

- In the field *PBX*, select the chat server from the drop-down list from which you would like to add chat IDs.
- Select one of the following options:

#### File import

Here, you can import chat IDs from an existing [CSV](#) file and add them to the table of chat IDs.

Only ZIP files can be selected. For this reason, the [CSV](#) file must have been packed in a ZIP file.


Activate or deactivate the check box *File contains a headline*.

☒ = activated:

The first line in the file is ignored during the import.

☐ = deactivated:

All file contents are imported and added to the extension table.

To import a file, click on the button  behind the *File name*, see [chapter "Import ZIP file", p. 27](#).

<i>Manual entry</i>	<p>Here, you can enter chat IDs manually and add them to the table of chat IDs.</p> <p>For a manual entry, proceed as follows:</p> <ul style="list-style-type: none"> <li>• Activate the option <i>Manual entry</i>.</li> <li>• In the entry field <i>Manual entry</i>, enter the chat IDs. Different chat IDs can be separated by the following delimiters (,;).</li> </ul>
<i>Add empty chat ID</i>	Here, you can add an empty chat ID to filter for it.

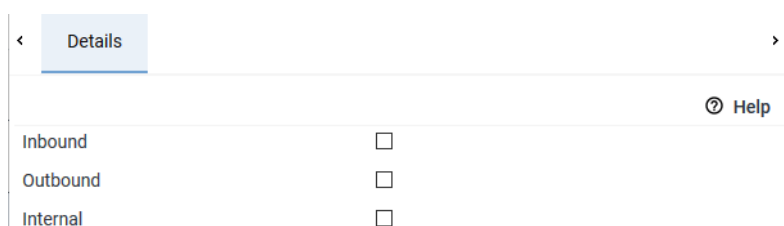
4. Activate or deactivate the check box *Replace existing list of chat IDs*.  
☒ = Activated  
 All existing chat IDs which have already been assigned are deleted. The newly selected chat IDs are added.  
☐ = Deactivated  
 Existing chat IDs which have already been assigned are kept. The newly selected chat IDs are added.
5. Click on the button *Add*.  
 ⇒ The chat IDs are added to the table of chat IDs.
6. If errors have been detect, the window *Result* appears.  
 Click on the button *Display Error Report* to open the window *Error Report*. This window displays the first 100 chat IDs with an error including the description of the error.  
 To close the window *Error Report*, click on the button *Close*.  
 To close the window *Result*, click on the button *Close*.

#### 9.4 Conversation direction

Here, you can define decision criteria which refer to the selected conversation direction.

Here, you can apply this decision criterion to the following conversation types:

- Calls
- Text Messages



Details	
Inbound	<input type="checkbox"/>
Outbound	<input type="checkbox"/>
Internal	<input type="checkbox"/>

Fig. 29: Conversation direction - details (example Compliance module)

You have 3 options:

- *Inbound*
- *Outbound*
- *Internal* (only Compliance module)

To activate a criterion, click on the check box.

☒ = The criterion has been activated.

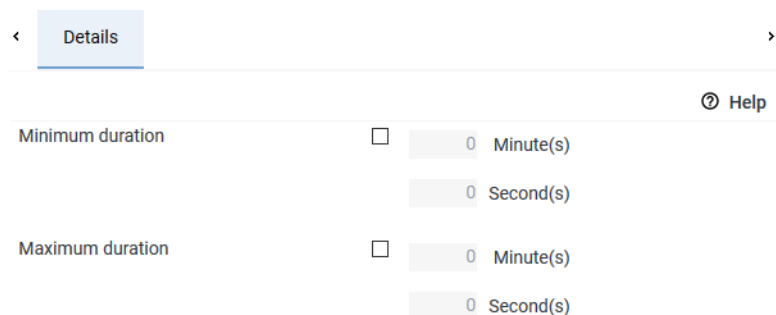
☐ = The criterion has been deactivated.

#### 9.5 Duration

Here, you can define decision criteria which refer to the indicated minimum and/or maximum duration.

In a compliance recording profile this indication of time refers to a conversation. In a quality management recording profile this indication of time refers to a session.





< Details >

② Help

Minimum duration ☐ 0 Minute(s)  
0 Second(s)

Maximum duration ☐ 0 Minute(s)  
0 Second(s)

Fig. 30: Duration - details

To activate a criterion, click on the check box.

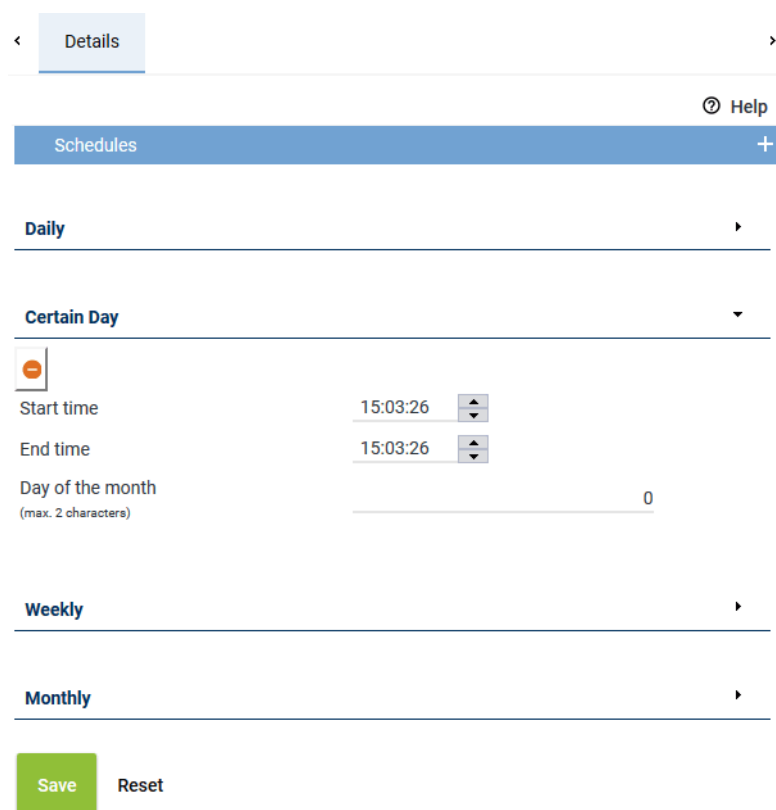
☒ = The criterion has been activated.

☐ = The criterion has been deactivated.

## 9.6

### Schedule

Here, you can define decision criteria which refer to a schedule.




< Details >

② Help

Schedules +

Daily ▶

Certain Day ▼



Start time 15:03:26 ▲▼

End time 15:03:26 ▲▼

Day of the month 0  
(max. 2 characters)


Weekly ▶

Monthly ▶


Save Reset

Fig. 31: Schedule - details

- To add a schedule, click on the icon  (*Add schedule*) in the detail view.

	<p><b>Add schedule</b></p> <p>Creates a schedule which indicates when the defined decision criteria are supposed to be checked.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> <li>• <i>Daily</i></li> <li>• <i>Certain Day</i></li> <li>• <i>Weekly</i></li> <li>• <i>Monthly</i></li> </ul>
---	---

You can select one or several options.

2. Adjust the respective settings in the detail view.
3. If you would like to remove a group field, click on the icon .

### Group field Daily

1. If you would like to create a daily schedule, select the option *Daily*.

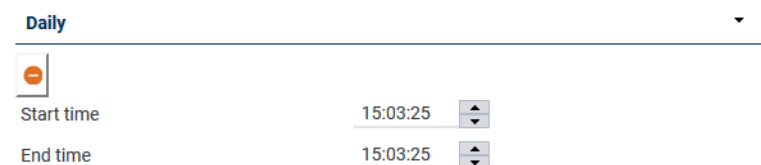


Fig. 32: Create daily schedule

2. Define the period of time that the decision criterion is supposed to be valid for.

<i>Start time</i>	Enter the start time directly via the keyboard or via the arrow keys.
<i>End time</i>	Enter the end time directly via the keyboard or via the arrow keys.

### Group field Certain Day

1. If you would like to create a schedule for a certain day, select the option *Certain Day*.

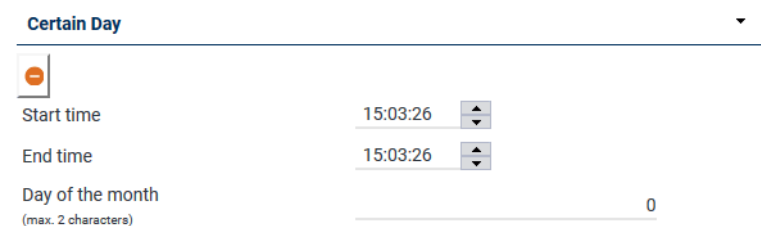


Fig. 33: Create schedule for a certain day

2. Define the period of time that the decision criterion is supposed to be valid for.

<i>Start time</i>	Enter the start time directly via the keyboard or via the arrow keys.
<i>End time</i>	Enter the end time directly via the keyboard or via the arrow keys.
<i>Day of the month</i>	Enter the day of the month. You can enter values from 1 to 31.

### Group field Weekly

1. If you would like to create a weekly schedule, select the option *Weekly*.

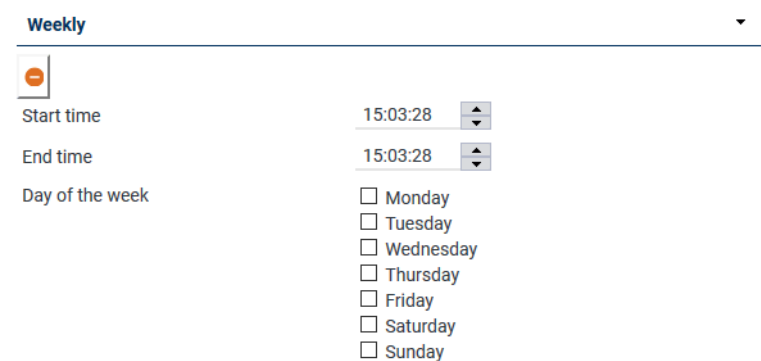


Fig. 34: Create weekly schedule

- Define the period of time and the weekdays that the decision criterion is supposed to be valid for.


<b>Start time</b>	Enter the start time directly via the keyboard or via the arrow keys.
<b>End time</b>	Enter the end time directly via the keyboard or via the arrow keys.
<b>Day of the week</b>	<p>Activate the check box of a least one day of the week. The defined decision criteria are checked on the days of the week you have marked.</p> <p><input checked="" type="checkbox"/> = activated <input type="checkbox"/> = deactivated</p>

### Group field Monthly

- If you would like to create a monthly schedule, select the option *Monthly*.

**Monthly** ▼

---



Start time

15:03:30

End time

15:03:30

First ▼

Day of the week

☐ Monday  
☐ Tuesday  
☐ Wednesday  
☐ Thursday  
☐ Friday  
☐ Saturday  
☐ Sunday

Fig. 35: Create monthly schedule

- Define the period of time and the days of the month that the decision criterion is supposed to be valid for.

<b>Start time</b>	Enter the start time directly via the keyboard or via the arrow keys.
<b>End time</b>	Enter the end time directly via the keyboard or via the arrow keys.
<b>Drop-down list</b>	Select the temporal connection via the drop-down list.
<b>Day of the week</b>	<p>Activate the check box of a least one day of the week. The defined decision criteria are checked on the days of the week you have marked.</p> <p><input checked="" type="checkbox"/> = activated <input type="checkbox"/> = deactivated</p>

## 9.7

### Additional data

Here, you can define decision criteria which refer to additional data.

You can use the wildcards “\*” and “?” as follows:

- The question mark stands for exactly 1 arbitrary character.
- The asterisk stands for an arbitrary sequence of characters or for 1 character at a minimum.

Example:


Search entry	Exemplary results
?bc	abc, bbc, cbc etc.

Search entry	Exemplary results
*bc	abc, aabc, bbc, babaebc, cbc etc.
060215001???	060215001100, 060215001222, 060215001561
060215001*	0602150010, 06021500121, 060215001100

< Details >

? Help



Additional data - values +

Please select...  

Please select...

- Universal Call ID
- To Party
- ACD Group Number
- MLC Line
- Call Center ID
- Department
- Comment
- TradingTurret Group
- User name
- Department Key
- Turret
- Trading Line Group
- Customer name
- Business Unit
- Handset

Fig. 36: Additional data - details

1. To add additional data values, click on the icon  (Create).
2. From the drop-down list, select the respective display name that you have configured in the Additional Data module.
3. Enter the values to be checked into the field on the right side.
4. Click on the icon  to delete the additional data.



Only those display names are displayed for which the option *Available* has been activated in the Additional Data module. See administration manual *Additional Data module*.

## 9.8

### Statistics

Here, you can define decision criteria which refer to statistic appearance.

In the field *Criterion*, you can select 1 out of 4 possible criteria and decide whether the criterion applies per agent or globally for all agents. In addition, you have to select a temporal reference frame (time interval). Day, Week, Month or Quarter are available:

< Details >

? Help

Criterion

Criterion valid ☐ for all agents ☒ per agent

Time interval

Every  Session

Fig. 37: Statistics - details (example)

The following possibilities are available:

<i>Criterion</i>	<i>Each n session</i>	The number entered for <i>n</i> indicates the frequency in which sessions are selected in the time interval stated above.
	<i>x percent of sessions</i>	The number entered for <i>x</i> indicates the percentage of the sessions which are selected in the time interval stated above.
	<i>First x sessions in time interval</i>	The number entered for <i>x</i> indicates the number of sessions at the beginning of the time interval stated above which are selected one after the other.
	<i>Maximum of x sessions in time interval</i>	The number entered for <i>x</i> indicates the number of sessions which are selected at maximum in the time interval stated above.
<i>Scope of validity</i>	<i>for all agents</i>	Select this option if the criterion is supposed to apply for all agents.
	<i>per agent</i>	Select this option if the criterion is supposed to apply per agent.
<i>Time interval</i>	<i>Daily</i>	Select this option if the selection is supposed to be made on a daily basis.
	<i>Weekly</i>	Select this option if the selection is supposed to be made on a weekly basis.
	<i>Monthly</i>	Select this option if the selection is supposed to be made on a monthly basis.
	<i>Quarterly</i>	Select this option if the selection is supposed to be made on the basis of a quarter of a year.
<i>Each ... session</i> <i>Percent of sessions</i> <i>First ... sessions in time interval</i> <i>Maximum amount of sessions within an interval</i>		Enter the value of the placeholder ( <i>n</i> , <i>x</i> ) that you have selected under <i>Criterion</i> for the selection criterion.

1. Select a criterion.
2. Select whether the criterion is supposed to apply for all agents or per agent.
3. Select the time interval.
4. Depending on the selected criterion, select a value for the placeholder.

### Example 1

Situation:

You have 50 agents. Each agent makes approx. 40 calls a day. I. e. there is a total of about 2.000 calls a day.

You would like to record every 5th session that all agents make during the day.

Enter the following parameters:

<i>Criterion</i>	<i>Each n session</i>
<i>Criterion valid</i>	<i>for all agents</i>
<i>Time interval</i>	Daily
<i>Each ... session</i>	5

Result:

Every day, approx. 400 calls are recorded. Calls are selected at random regardless of the agent who made them.

### Example 2

Situation:

You have 50 agents. Each agent makes approx. 40 calls a day on 5 days of the week. I. e. there are about 200 calls per agent and a total of about 10.000 calls per week.

Each week, you would like to record every 10th session of each agent.

Enter the following parameters:

<i>Criterion</i>	<i>Each n session</i>
<i>Criterion valid</i>	<i>per agent</i>
<i>Time interval</i>	Weekly
<i>Each ... session</i>	10

Result:

Every week, about 20 calls of each agent are recorded. I. e. if you have 50 agents, about 1.000 calls a week are recorded.

### Example 3

Situation:

You have 50 agents. Each agent makes approx. 40 calls a day on 5 days of the week. I. e. there are about 2.400 calls per agent and a total of about 120.000 calls per quarter.

Each quarter, you would like to record 5 % of the session of each agent.

Enter the following parameters:

<i>Criterion</i>	<i>x percent of sessions</i>
<i>Criterion valid</i>	<i>per agent</i>
<i>Time interval</i>	Quarterly
<i>Each ... session</i>	5

Result:

Every quarter of a year, about 120 calls of each agent are recorded. I. e. if you have 50 agents, about 6.000 calls are recorded each quarter of a year.

### Example 4

Situation:

You have 50 agents. Each agent makes approx. 40 calls a day on 5 days of the week. I. e. there are about 200 calls per agent and a total of about 10.000 calls per week.

You would like to record a maximum of 100 sessions of all sessions that all agents make during the month.

Enter the following parameters:

<i>Criterion</i>	<i>First x sessions in time interval</i>
<i>Criterion valid</i>	<i>per agent</i>
<i>Time interval</i>	Weekly
<i>Each ... session</i>	4

Result:

Every week, the first 4 calls of each agent are recorded. I. e. if you have 50 agents, about 200 calls a week are recorded.

#### Example 5

Situation:

You have 50 agents. Each agent makes approx. 40 calls a day. I. e. there is a total of about 40.000 calls a month.

You would like to record a maximum of 100 sessions of all sessions that all agents make during the month.

Enter the following parameters:

<i>Criterion</i>	<i>Maximum of x sessions in time interval</i>
<i>Criterion valid</i>	<i>for all agents</i>
<i>Time interval</i>	Monthly
<i>Each ... session</i>	100

Result:

Every month, a maximum of 100 calls are recorded. The agents and calls are selected at random.

## 10 Create/Edit action node configuration

Here, you can create and edit an action node.

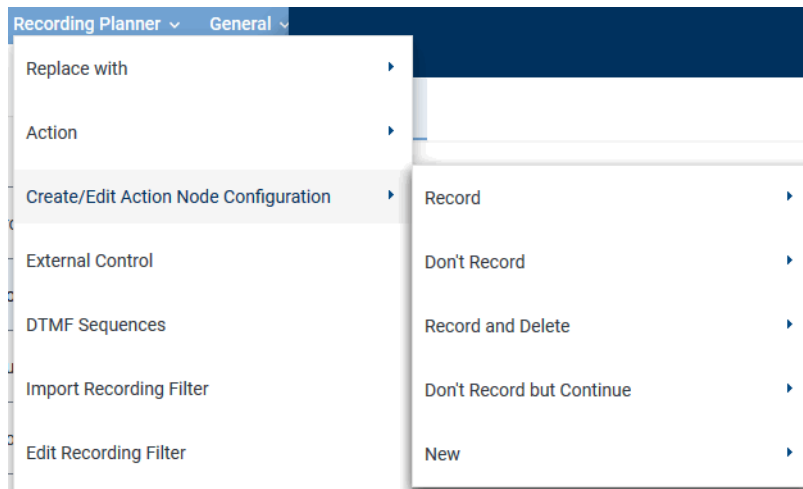


Fig. 38: Create and edit action node configuration.

You have 5 options:

- *Record*
- *Don't record*
- *Record and delete*
- *Don't record but continue*

In the opened window, you can apply a node from the selection.

With the exception of the *Default* node, only those nodes are listed here which have been created previously in *New*.

- *New*

Here, you can create a new action node. See [chapter "Create new action node configuration", p. 40](#).

After you have made your selection, you see the possible settings in the right detail window.



Default nodes are exemplary nodes. They may be changed and deleted.



By deleting the recordings, all additional data and evaluated agent sessions are deleted, too. To avoid this, you can define a differing retention period (TTL) for the compliance recording plan as well as for the QM recording plan. See [chapter "Configure differing retention period", p. 70](#).

### 10.1 Create new action node configuration

You can create your own action nodes based on those exemplary default action nodes.

You can select 4 different default action nodes:

- *Record* (see [chapter "Action node configuration Record", p. 41](#))
- *Don't record* (see [chapter "Action node configuration Don't record", p. 44](#))
- *Record and delete* (see [chapter "Action node configuration Record and Delete", p. 46](#))
- *Don't record but continue* (see [chapter "Action node configuration Don't record but continue", p. 49](#))

1. Select the action node you would like to create.



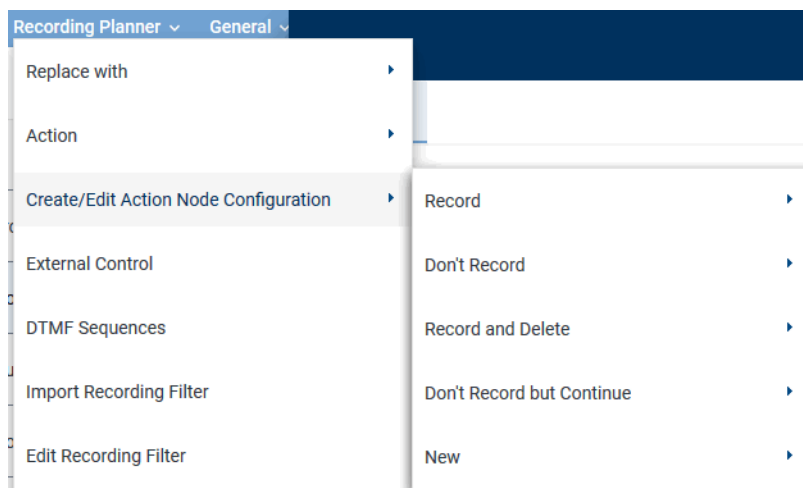


Fig. 39: Create action node configuration

2. In the field *Name*, enter the name of the new action node.
3. Make the necessary changes.
4. To save the entries, click on the button *Save*.  
To discard entries, click on the button *Cancel*.

#### 10.1.1 Action node configuration Record

All conversations are recorded automatically. If required, additional options can be configured. This action node allows checking the QM recording profile.

In the tab *Details*, you can adjust the specific settings:

Configuration

Details\*

Type

Record

Name\*

Default

Recording Suppression

Suppress recording of external participants

☐

Suppress recording of internal participants

☐

Delete Recordings

Delete

☒ Never
 ☐ After
 

0 Year(s)

0 Month(s)

0 Day(s)

0 Hour(s)

0 Minute(s)

Wrap-up Time

Only with recording

☐

Duration

0 Minute(s)

0 Second(s)

External Recording Control

Allowed clients

☐ API
 ☒ CLIENTcommand
 ☒ DTMF sequences
 ☐ Function keys
 ☒ PHONEapp
 ☐ SCREENrec
 ☐ WEBcommand

Allowed Actions

Start recordings

☒

Stop recordings

☒

Stopped recordings

☒ Keep, if not externally deleted
 ☐ Delete, if not externally kept

Keep recordings

☒

Delete recordings

☒

Suppress recordings

☒

Unsuppress recordings

☒

Save

Cancel

Fig. 40: Record

**General**

*Type* = Here, you can see the type of the action node.

*Name* = Select a name for the action node.

**Recording Suppression**

By activating the check boxes, you can suppress the entire recording of a running conversation of external or internal participants:

- *Suppress recording of external participants*
- *Suppress recording of internal participants*

<i>Delete recordings</i>	<p>By activating an option, you can select a period after which the recording is supposed to be deleted (<b>TTL</b>). Only 1 selection is possible.</p> <ul style="list-style-type: none"> <li>• <i>Never</i></li> <li>• <i>After</i> = Enter a period of time here.</li> </ul>
<i>Wrap-up time</i>	<p>By activating the check box <i>Only with recording</i>, you define whether the wrap-up time is supposed to be started only when there is a corresponding recording by the end of the conversation, e. g. because bulk recording has been selected or because the recording has been started manually.</p> <p><input checked="" type="checkbox"/> = The wrap-up time is only available when there is a recording.  <input type="checkbox"/> = The wrap-up time is available.</p> <p>By selecting a <i>Duration</i>, you define how long the wrap-up time is supposed to be. The duration of the wrap-up time affects the following areas:</p> <ul style="list-style-type: none"> <li>• Screen recording</li> <li>• Entering additional data</li> <li>• Deleting/Keeping recordings (recording mode Keep/Delete)</li> </ul>
<i>External Recording Control</i>	<p>By activating the check boxes, you define the allowed type of external recording control.</p> <ul style="list-style-type: none"> <li>• <i>API</i></li> <li>• <i>CLIENTcommand</i></li> <li>• <i>DTMF sequences</i></li> <li>• <i>Function keys</i></li> <li>• <i>PHONEapp</i></li> <li>• <i>SCREENrec</i></li> <li>• <i>WEBcommand</i></li> </ul>
<i>Allowed Actions</i>	<p>By activating the check boxes, you define the allowed type of external recording control.</p> <ul style="list-style-type: none"> <li>• <i>Start/Stop recordings</i> Allows starting/stopping a recording manually (recording mode Start/Stop)</li> <li>• <i>Delete/Keep recordings</i> Allows deciding during a running conversation whether a recording is supposed to be saved or discarded (recording mode Keep/Delete)</li> <li>• <i>Suppress/Unsuppress recordings</i> Allows suppressing the recording of a running conversation without having to finish it. This function can be applied for all recording formats and can be used for the following application scenarios among others: <ul style="list-style-type: none"> <li>- Hiding passwords for online banking</li> <li>- Muting/Unmuting audio recordings in <i>CLIENTcommand</i> or in the <i>PHONEapp</i></li> </ul> </li> </ul> <p>By activating an option, you can define what is supposed to happen to the recordings which have been stopped by the action <i>Start/Stop recordings</i>. Only 1 selection is possible.</p> <ul style="list-style-type: none"> <li>• <i>Keep, if not externally deleted</i></li> <li>• <i>Delete, if not externally kept</i></li> </ul>

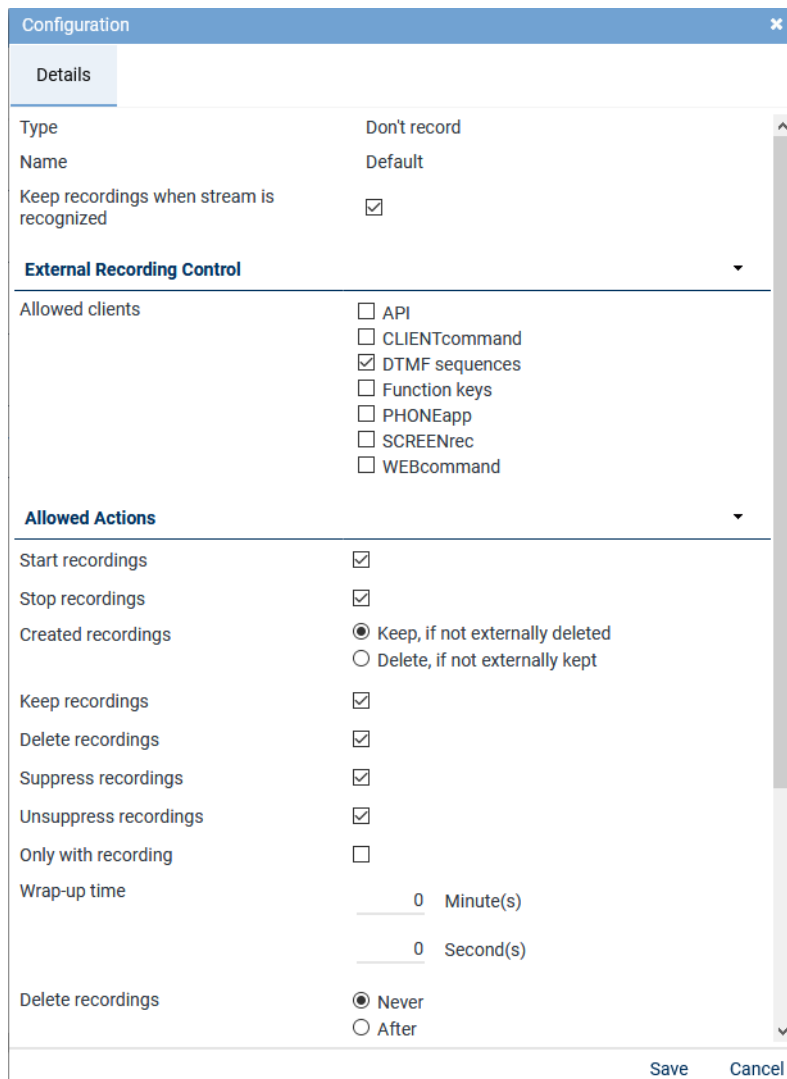
If you would like to have the possibility to change the configured recording mode for stopped recordings via external control, you additionally have to activate the check box *Delete/Keep recordings*.

- To save the entries, click on the button *Save*.  
To discard entries, click on the button *Cancel*.

### 10.1.2 Action node configuration Don't record

No conversation is recorded. However, a recording can be started via external recording control. If required, additional options can be configured. No further profile will be checked.

In the tab *Details*, you can adjust the specific settings:



The screenshot shows the 'Configuration' dialog box with the 'Details' tab selected. The configuration is for the 'Don't record' action node. The 'Type' is 'Don't record' and the 'Name' is 'Default'. The 'Keep recordings when stream is recognized' checkbox is checked. Under 'External Recording Control', the 'Allowed clients' section has checkboxes for API, CLIENTcommand, DTMF sequences (checked), Function keys, PHONEapp, SCREENrec, and WEBcommand. Under 'Allowed Actions', there are checkboxes for Start recordings, Stop recordings, Keep recordings, Delete recordings, Suppress recordings, and Unsuppress recordings, all of which are checked. The 'Created recordings' section has radio buttons for 'Keep, if not externally deleted' (selected) and 'Delete, if not externally kept'. The 'Wrap-up time' section has input fields for 'Minute(s)' (0) and 'Second(s)' (0). The 'Delete recordings' section has radio buttons for 'Never' (selected) and 'After'.

Fig. 41: Don't record

#### General

*Type* = Here, you can see the type of the action node.

*Name* = Select a name for the action node.

*Keep recordings when stream is recognized* = Make sure that the check box has been unchecked.

If only those recordings are supposed to be kept in which an audio stream has been recognized, select the action node type *Record and Delete*, see [chapter "Action node configuration Record and Delete"](#), p. 46.

<i>External Recording Control</i>	<p>By activating the check boxes, you define the allowed type of external recording control.</p> <ul style="list-style-type: none"> <li>• <i>API</i></li> <li>• <i>CLIENTcommand</i></li> <li>• <i>DTMF sequences</i></li> <li>• <i>Function keys</i></li> <li>• <i>PHONEapp</i></li> <li>• <i>SCREENrec</i></li> <li>• <i>WEBcommand</i></li> </ul>
<i>Allowed Actions</i>	<p>By activating the check boxes, you define the allowed type of external recording control.</p> <ul style="list-style-type: none"> <li>• <i>Start/Stop recordings</i> Allows starting/stopping a recording manually (recording mode Start/Stop)</li> <li>• <i>Delete/Keep recordings</i> Allows deciding during a running conversation whether a recording is supposed to be saved or discarded (recording mode Keep/Delete)</li> <li>• <i>Suppress/Unsuppress recordings</i> Allows suppressing the recording of a running conversation without having to finish it. This function can be applied for all recording formats and can be used for the following application scenarios among others: <ul style="list-style-type: none"> <li>- Hiding passwords for online banking</li> <li>- Muting/Unmuting audio recordings in <i>CLIENTcommand</i> or in the <i>PHONEapp</i></li> </ul> </li> </ul> <p>By activating an option, you can define what is supposed to happen to created recordings which have been started by the action <i>Start/Stop recordings</i>. Only 1 selection is possible.</p> <ul style="list-style-type: none"> <li>• <i>Keep, if not externally deleted</i></li> <li>• <i>Delete, if not externally kept</i></li> </ul> <p>If you would like to have the possibility to change the configured recording mode for started recordings via external control, you additionally have to activate the check box <i>Delete/Keep recordings</i>.</p>
<i>Wrap-up time</i>	<p>By activating the check box <i>Only with recording</i>, you define whether the wrap-up time is supposed to be started only when there is a corresponding recording by the end of the conversation, e. g. because bulk recording has been selected or because the recording has been started manually.</p> <p><input checked="" type="checkbox"/> = The wrap-up time is only available when there is a recording.  <input type="checkbox"/> = The wrap-up time is available.</p> <p>By selecting a <i>Duration</i>, you define how long the wrap-up time is supposed to be. The duration of the wrap-up time affects the following areas:</p> <ul style="list-style-type: none"> <li>• Screen recording</li> <li>• Entering additional data</li> <li>• Deleting/Keeping recordings (recording mode Keep/Delete)</li> </ul>

**Delete recordings**

By activating an option, you can select a period after which the recording is supposed to be deleted (TTL). Only 1 selection is possible.

- *Never*
- *After* = Enter a period of time here.

1. To save the entries, click on the button *Save*.  
To discard entries, click on the button *Cancel*.

**10.1.3 Action node configuration Record and Delete**

The conversation is recorded but will be deleted at the end. Deletion can be prevented by means of external recording control by making the explicit decision to keep the recording. If required, additional options can be configured. No further profile will be checked.

In the tab *Details*, you can adjust the specific settings:

Configuration

Details\*

Type
Record and delete

Name\*
Default

Keep recordings when stream is recognized
☐

Recording Suppression

Suppress recording of external participants
☐

Suppress recording of internal participants
☐

External Recording Control

Allowed clients

☐ API
☒ CLIENTcommand
☒ DTMF sequences
☐ Function keys
☒ PHONEapp
☐ SCREENrec
☐ WEBcommand

Keep recordings
☒

Delete recordings
☒

Only with recording
☐

Wrap-up time

0 Minute(s)
0 Second(s)

Start recordings
☒

Stop recordings
☒

Suppress recordings
☒

Unsuppress recordings
☒

Delete kept recordings

☒ Never
☐ After

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

Save
Cancel

Fig. 42: Record and delete

**General**

**Type** = Here, you can see the type of the action node.

**Name** = Select a name for the action node.

**Keep recordings when stream is recognized** = Activate the check box if only those recordings are supposed to be kept for which an audio stream has been recognized (e. g. if *Selective Recording* has been configured for the Cisco phone and the recording is started via the phone key *Recording*). All calls without audio data are discarded automatically.

<i>Recording Suppression</i>	<p>By activating the check boxes, you can suppress the entire recording of a running conversation of external or internal participants:</p> <ul style="list-style-type: none"> <li>• <i>Suppress recording of external participants</i></li> <li>• <i>Suppress recording of internal participants</i></li> </ul>
<i>External Recording Control</i>	<p>By activating the check boxes, you define the allowed type of external recording control.</p> <ul style="list-style-type: none"> <li>• <i>API</i></li> <li>• <i>CLIENTcommand</i></li> <li>• <i>DTMF sequences</i></li> <li>• <i>Function keys</i></li> <li>• <i>PHONEapp</i></li> <li>• <i>SCREENrec</i></li> <li>• <i>WEBcommand</i></li> </ul>
<i>Allowed Actions</i>	<p>By activating the check boxes, you define the allowed type of external recording control.</p> <ul style="list-style-type: none"> <li>• <i>Start/Stop recordings</i> Allows starting/stopping a recording manually (recording mode Start/Stop)</li> <li>• <i>Delete/Keep recordings</i> Allows deciding during a running conversation whether a recording is supposed to be saved or discarded (recording mode Keep/Delete)</li> <li>• <i>Suppress/Unsuppress recordings</i> Allows suppressing the recording of a running conversation without having to finish it. This function can be applied for all recording formats and can be used for the following application scenarios among others: <ul style="list-style-type: none"> <li>- Hiding passwords for online banking</li> <li>- Muting/Unmuting audio recordings in <i>CLIENTcommand</i> or in the <i>PHONEapp</i></li> </ul> </li> </ul>
<i>Wrap-up time</i>	<p>By activating the check box <i>Only with recording</i>, you define whether the wrap-up time is supposed to be started only when there is a corresponding recording by the end of the conversation, e. g. because bulk recording has been selected or because the recording has been started manually.</p> <p><input checked="" type="checkbox"/> = The wrap-up time is only available when there is a recording.  <input type="checkbox"/> = The wrap-up time is available.</p> <p>By selecting a <i>Duration</i>, you define how long the wrap-up time is supposed to be. The duration of the wrap-up time affects the following areas:</p> <ul style="list-style-type: none"> <li>• Screen recording</li> <li>• Entering additional data</li> <li>• Deleting/Keeping recordings (recording mode Keep/Delete)</li> </ul>
<i>Delete kept recordings</i>	<p>By activating an option, you can select a period after which the kept recordings are supposed to be deleted (<a href="#">TTL</a>). Only 1 selection is possible.</p> <ul style="list-style-type: none"> <li>• <i>Never</i></li> <li>• <i>After</i> = Enter a period of time here.</li> </ul>



- To save the entries, click on the button *Save*.  
To discard entries, click on the button *Cancel*.

#### 10.1.4 Action node configuration Don't record but continue

No conversation is recorded. However, a recording can be started via external recording control. If required, additional options can be configured. The action nodes allows checking another (following) profile or another recording plan, though.

In the tab *Details*, you can adjust the specific settings:

Configuration	
Details*	
Type	Don't record but continue
Name*	Default
Keep recordings when stream is recognized	<input type="checkbox"/>
<b>External Recording Control</b>	
Allowed clients	<input type="checkbox"/> API <input checked="" type="checkbox"/> CLIENTcommand <input type="checkbox"/> DTMF sequences <input type="checkbox"/> Function keys <input type="checkbox"/> PHONEapp <input type="checkbox"/> SCREENrec <input type="checkbox"/> WEBcommand
<b>Allowed Actions</b>	
Start recordings	<input checked="" type="checkbox"/>
Stop recordings	<input checked="" type="checkbox"/>
Created recordings	<input checked="" type="radio"/> Keep, if not externally deleted <input type="radio"/> Delete, if not externally kept
Keep recordings	<input checked="" type="checkbox"/>
Delete recordings	<input checked="" type="checkbox"/>
Suppress recordings	<input checked="" type="checkbox"/>
Unsuppress recordings	<input checked="" type="checkbox"/>
Only with recording	<input type="checkbox"/>
Wrap-up time	<input type="text" value="0"/> Minute(s) <input type="text" value="0"/> Second(s)
Delete recordings	<input checked="" type="radio"/> Never <input type="radio"/> After <div> <input type="text" value="0"/> Year(s)  <input type="text" value="0"/> Month(s)  <input type="text" value="0"/> Day(s)  <input type="text" value="0"/> Hour(s)  <input type="text" value="0"/> Minute(s)           </div>
<div>Save Cancel</div>	

Fig. 43: Don't record but continue

#### General

*Type* = Here, you can see the type of the action node.

*Name* = Select a name for the action node.

	<p><i>Keep recordings when stream is recognized</i> = Activate the check box if only those recordings are supposed to be kept for which an audio stream has been recognized (e. g. if <i>Selective Recording</i> has been configured for the Cisco phone and the recording is started via the phone key <i>Recording</i>). All calls without audio data are discarded automatically.</p>
<i>External Recording Control</i>	<p>By activating the check boxes, you define the allowed type of external recording control.</p> <ul style="list-style-type: none"> <li>• <i>API</i></li> <li>• <i>CLIENTcommand</i></li> <li>• <i>DTMF sequences</i></li> <li>• <i>Function keys</i></li> <li>• <i>PHONEapp</i></li> <li>• <i>SCREENrec</i></li> <li>• <i>WEBcommand</i></li> </ul>
<i>Allowed Actions</i>	<p>By activating the check boxes, you define the allowed type of external recording control.</p> <ul style="list-style-type: none"> <li>• <i>Start/Stop recordings</i> Allows starting/stopping a recording manually (recording mode Start/Stop)</li> <li>• <i>Delete/Keep recordings</i> Allows deciding during a running conversation whether a recording is supposed to be saved or discarded (recording mode Keep/Delete)</li> <li>• <i>Suppress/Unsuppress recordings</i> Allows suppressing the recording of a running conversation without having to finish it. This function can be applied for all recording formats and can be used for the following application scenarios among others: <ul style="list-style-type: none"> <li>- Hiding passwords for online banking</li> <li>- Muting/Unmuting audio recordings in <i>CLIENTcommand</i> or in the <i>PHONEapp</i></li> </ul> </li> </ul> <p>By activating an option, you can define what is supposed to happen to created recordings which have been started by the action <i>Start/Stop recordings</i>. Only 1 selection is possible.</p> <ul style="list-style-type: none"> <li>• <i>Keep, if not externally deleted</i></li> <li>• <i>Delete, if not externally kept</i></li> </ul> <p>If you would like to have the possibility to change the configured recording mode for started recordings via external control, you additionally have to activate the check box <i>Delete/Keep recordings</i>.</p>
<i>Wrap-up time</i>	<p>By activating the check box <i>Only with recording</i>, you define whether the wrap-up time is supposed to be started only when there is a corresponding recording by the end of the conversation, e. g. because bulk recording has been selected or because the recording has been started manually.</p> <p><input checked="" type="checkbox"/> = The wrap-up time is only available when there is a recording.  <input type="checkbox"/> = The wrap-up time is available.</p>

By selecting a *Duration*, you define how long the wrap-up time is supposed to be. The duration of the wrap-up time affects the following areas:

- Screen recording
- Entering additional data
- Deleting/Keeping recordings (recording mode Keep/Delete)

#### Delete recordings

By activating an option, you can select a period after which the recording is supposed to be deleted (**TTL**). Only 1 selection is possible.

- *Never*
- *After* = Enter a period of time here.

1. To save the entries, click on the button *Save*.  
To discard entries, click on the button *Cancel*.

## 10.2 Edit action node configuration

1. Select the action node you would like to edit.

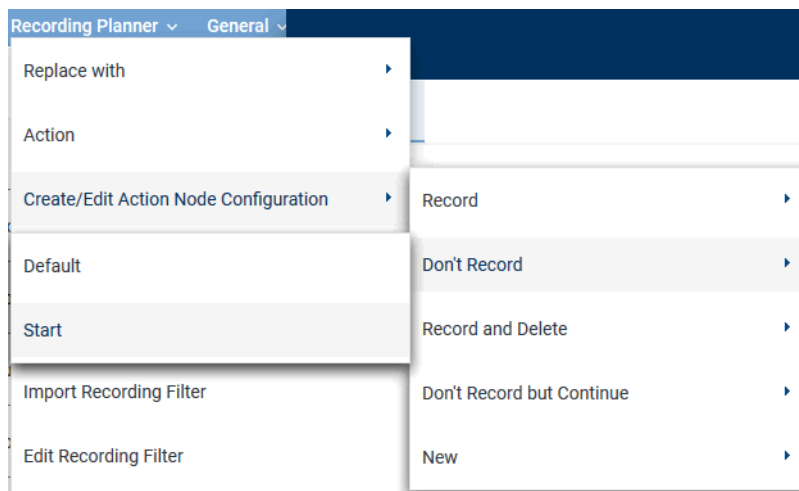


Fig. 44: Edit action node configuration

2. In the field *Name*, enter a new name if you would like to change the name of the action node.
3. Make the necessary changes.
4. To save the entries, click on the button *Save*.  
To discard entries, click on the button *Cancel*.
5. To delete the action node, click on the button *Delete*.



Default nodes are exemplary nodes. They may be changed and deleted.

## 11 Configure operation modes


Different operation modes are possible for the recording. To create an operation mode, you have to create a profile.



Default nodes are exemplary nodes. They may be changed and deleted.

### 11.1 Automatic recording of all conversations (bulk recording)

This operation mode implies that all conversations on all configured end devices are always recorded completely.

1. Open the Recording Planner module by clicking on the menu item *Recording Planner* in the navigation bar of the System Configuration.
2. Click on the menu item *Compliance*.
3. In the main view, click on the icon  (*Create/Duplicate profile*).
4. Select the options *New from Default Call Profile* and *Record All*.
5. Complete the required fields in the detail area.
6. Click on the button *Save*.

⇒ The new profile is displayed in the main view.

+ × Recording Planner ▾ General ▾	
Name	Activated
▶ Start	✓
▶ Phone Profile	✗
▶ Import Bulk	✗
▼ Bulk Recording	✗
Action: Record - Default	

Fig. 45: Recording Planner - main view - recording profile (example)

7. Check the settings of the action node and replace it with an individually created action node, if required.
8. Click on the menu item *Recording Planner > Create/Edit Action Node Configuration* in the toolbar.
9. Select the option *New* and *Record*.
 

⇒ The detail view *Configuration* opens.

Configuration	
Details*	
Type	Record
Name*	Bulk Recording
<b>Recording Suppression</b>	
Suppress recording of external participants	<input type="checkbox"/>
Suppress recording of internal participants	<input type="checkbox"/>
<b>Delete Recordings</b>	
Delete	<input checked="" type="radio"/> Never <input type="radio"/> After
	<input type="text" value="0"/> Year(s) <input type="text" value="0"/> Month(s) <input type="text" value="0"/> Day(s) <input type="text" value="0"/> Hour(s) <input type="text" value="0"/> Minute(s)
<b>Wrap-up Time</b>	
Duration	<input type="text" value="0"/> Minute(s) <input type="text" value="0"/> Second(s)
<b>External Recording Control</b>	
Allowed clients	<input type="checkbox"/> API <input type="checkbox"/> CLIENTcommand <input type="checkbox"/> DTMF sequences <input checked="" type="checkbox"/> Function keys <input checked="" type="checkbox"/> PHONEapp <input type="checkbox"/> SCREENrec
<b>Allowed Actions</b>	
Start recordings	<input checked="" type="checkbox"/>
Stop recordings	<input checked="" type="checkbox"/>
Stopped recordings	<input checked="" type="radio"/> Keep, if not externally deleted <input type="radio"/> Delete, if not externally kept
Keep recordings	<input checked="" type="checkbox"/>
Delete recordings	<input checked="" type="checkbox"/>
Suppress recordings	<input checked="" type="checkbox"/>
Unsuppress recordings	<input checked="" type="checkbox"/>
<div>Save Cancel</div>	

Fig. 46: Recording Planner - detail view - action node configuration "Record - bulk recording"

10. Enter a name for the configuration (e. g. Bulk recording).

11. Activate the following options under *External Recording Control*:

Function keys	Enables you to activate the recording via the function keys of the end devices.
PHONEapp	Enables you to control the recording via the PBX in general.

12. Activate the following options under *Allowed Actions*:

Start/Stop recordings	Allows starting and stopping the recording manually for all clients which have been activated in <i>External recording control</i> .
Stopped recordings Keep, if not externally deleted	Stopped recordings are kept by default provided no external control takes place.
Delete/Keep recordings (optional)	Allows deleting or keeping recorded conversations via the manual control by means of the function keys.
Suppress/Unsuppress recordings (optional)	Allows suppressing the recording of a running conversation without having to finish it. This function can be applied for all recording formats.

13. Click on the button *Save*.
14. Expand the area of the profile in the main view.
15. Click on the default action node *Action: record - default* and subsequently on the menu item *Recording Planner > Action*.
16. Select the option *Record* and subsequently your recently created action node (e. g. bulk recording).
17. Click on the profile and activate the check box *Activated* in the detail view.
18. Click on the button *Save*.




An action node can only be replaced if the profile is not active.

## 11.2

### Manual recording of all conversations (record on demand)

This operation mode implies that the user can decide whether the current conversation will be recorded completely. This operation mode can be implemented by means of a profile with one of the following variants of action nodes:

- Don't record  
Use this action node if this is supposed to be the final profile and no other profiles are supposed to be checked.
  - Don't record but continue  
Use this action node if other profiles are supposed to be checked subsequently.
1. Open the Recording Planner module by clicking on the menu item *Recording Planner* in the navigation bar of the System Configuration.
  2. Click on the menu item *Compliance*.
  3. In the main view, click on the icon  (*Create/Duplicate profile*).
  4. Select the options *New from Default Call Profile* and *No Recording*.
  5. Complete the required fields in the detail area.
  6. Click on the button *Save*.
- ⇒ The new profile is displayed in the main view.

+ × Recording Planner ▾ General ▾	
Name	Activated
▶ Start	✓
▶ Phone Profile	✗
▶ Import Bulk	✗
▼ Bulk Recording	✗
Action: Record - Default	

Fig. 47: Recording Planner - main view - recording profile (example)

7. Check the settings of the action node and change them as follows, if required.
8. Click on the menu item *Recording Planner > Create/Edit Action Node Configuration* in the toolbar.
9. Select the option *Don't Record and Default* or *Don't Record but Continue and Default*.  
⇒ The detail view *Configuration* opens.

Configuration

Details

Type  
Name  
Keep recordings when stream is recognized  
☒

Don't record  
Default  
☒

External Recording Control

Allowed clients  
☐ API  
☐ CLIENTcommand  
☒ DTMF sequences  
☐ Function keys  
☐ PHONEapp  
☐ SCREENrec  
☐ WEBcommand

Allowed Actions

Start recordings  
Stop recordings  
Created recordings  
Keep recordings  
Delete recordings  
Suppress recordings  
Unsuppress recordings  
Only with recording  
Wrap-up time  
Delete recordings

☒  
☒  
☒ Keep, if not externally deleted  
☐ Delete, if not externally kept  
☒  
☒  
☒  
☒  
☐  
0 Minute(s)  
0 Second(s)  
☒ Never  
☐ After

Save Cancel

Fig. 48: Recording Planner - detail view - action node configuration "Don't record"

Configuration

Details\*

Type

Don't record but continue

Name\*

Default

Keep recordings when stream is recognized

☐

External Recording Control

Allowed clients

☐ API  
☒ CLIENTcommand  
☐ DTMF sequences  
☐ Function keys  
☐ PHONEapp  
☐ SCREENrec  
☐ WEBcommand

Allowed Actions

Start recordings

☒

Stop recordings

☒

Created recordings

☒ Keep, if not externally deleted  
☐ Delete, if not externally kept

Keep recordings

☒

Delete recordings

☒

Suppress recordings

☒

Unsuppress recordings

☒

Only with recording

☐

Wrap-up time

0 Minute(s)

0 Second(s)

Delete recordings

☒ Never  
☐ After
 

0 Year(s)

0 Month(s)

0 Day(s)

0 Hour(s)

0 Minute(s)

Save

Canc

Fig. 49: Recording Planner - detail view - action node configuration “Don't record but continue”

10. Activate the check box *Keep recordings when stream is recognized* if only those recordings are supposed to be kept for which an audio stream has been recognized.
11. Activate the following options under *External Recording Control*:

Function keys	Enables you to activate the recording via the function keys of the end devices.
PHONEapp	Enables you to control the recording via the PBX in general.

12. Activate the following options under *Allowed Actions*:

Start/Stop recordings	Allows starting and stopping the recording manually for all clients which have been activated in <i>External recording control</i> .
-----------------------	--



Created recordings Keep, if not externally deleted <i>or</i> Delete, if not externally kept	Select one of the two options. Created recordings can be kept or deleted by default provided no external control takes place.
Delete/Keep recordings	Allows deleting or keeping recorded conversations via the manual control by means of the function keys.
Suppress/Unsuppress recordings (optional)	Allows suppressing the recording of a running conversation without having to finish it. This function can be applied for all recording formats.

13. Click on the button **Save**.

To use the action node *Don't Record but Continue*, replace the existing action node as follows.

14. Expand the area of the profile in the main view.

15. Click on the default action node *Action: record - default* and subsequently on the menu item *Recording Planner > Action*.

16. Select the option *Don't Record but Continue* and subsequently *Default* or a newly created action node.

17. Click on the profile and activate the check box *Activated* in the detail view.

18. Click on the button **Save**.




An action node can only be replaced if the profile is not active.

### 11.3

#### Function Keep/Delete

In the application System Configuration in the Recording Planner module, there are several possibilities of planning the recordings. When using the functionality *Keep/Delete* (e. g. for threat calls and private calls), the complete call is recorded by default. Users can decide via the options *Keep* and *Delete* whether they would like save the recording or discard it. During the recording you can change from the status *Keep* to *Delete* and vice versa as often as necessary. The status at the end of the recording is the one that is decisive.

Which action node to select depends on the default behavior (keep or delete) that is to take effect:

- *Record* (default behavior Delete) e. g. for private calls
  - *Record and delete* (default behavior Keep) e. g. for threat calls
1. Open the Recording Planner module by clicking on the menu item *Recording Planner* in the navigation bar of the System Configuration.
  2. Click on the menu item *Compliance*.
  3. In the main view, click on the icon  (*Create/Duplicate profile*).
  4. Select the options *New from Default Call Profile* and *Record All*.
  5. Complete the required fields in the detail area.
  6. Click on the button **Save**.
- ⇒ The new profile is displayed in the main view.

+ × Recording Planner ▾ General ▾	
Name	Activated
▸ Start	✓
▸ Phone Profile	✗
▸ Import Bulk	✗
▾ Bulk Recording	✗
Action: Record - Default	

Fig. 50: Recording Planner - main view - recording profile (example)

### Configuration of a profile with the action node Record (Delete recording)

The conversation is kept unless it has been selected for deletion via external control.

1. Check the settings of the action node and change them as follows, if required.
2. Click on the menu item *Recording Planner > Create/Edit Action Node Configuration* in the toolbar.
3. Select the options *Record* and *Default*.  
⇒ The detail view *Configuration* opens.

Configuration
Details\*

Type
Record
Name\*
Default

Recording Suppression

Suppression recording of external participants
☐
Suppression recording of internal participants
☐

Delete Recordings

Delete
☒ Never
☐ After

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

Wrap-up Time

Only with recording
☐
Duration

0 Minute(s)
0 Second(s)

External Recording Control

Allowed clients
☐ API
☒ CLIENTcommand
☒ DTMF sequences
☐ Function keys
☒ PHONEapp
☐ SCREENrec
☐ WEBcommand

Allowed Actions

Start recordings
☒
Stop recordings
☒
Stopped recordings
☒ Keep, if not externally deleted
☐ Delete, if not externally kept
Keep recordings
☒
Delete recordings
☒
Suppress recordings
☒
Unsuppress recordings
☒

Save
Cancel

Fig. 51: Recording Planner - detail view - action node configuration "Record"

4. Activate the following options under *External Recording Control*:

Function keys	Enables you to activate the recording via the function keys of the end devices.
PHONE <u>app</u>	Enables you to control the recording via the PBX in general.

5. Activate the following options under *Allowed Actions*:

Start/Stop recordings	Allows starting and stopping the recording manually for all clients which have been activated in <i>External recording control</i> .
Stopped recordings Keep, if not externally deleted or Delete, if not externally kept	Select one of the two options. Stopped recordings can be kept or deleted by default provided no external control takes place.
Delete/Keep recordings	Allows deleting or keeping recorded conversations via the manual control by means of the function keys.
Suppress/Unsuppress recordings (optional)	Allows suppressing the recording of a running conversation without having to finish it. This function can be applied for all recording formats.

6. Click on the button *Save*.
7. Click on the profile and activate the check box *Activated* in the detail view.
8. Click on the button *Save*.

#### Configuration of a profile with the action node **Record and Delete (Keep recording)**

The conversation is recorded but deleted at the end unless it has been selected to be kept via external control.

1. Expand the area of the profile in the main view.
2. Click on the default action node *Action: record - default* and subsequently on the menu item *Recording Planner > Action*.
3. Select the option *Record and Delete* and subsequently *Default* or a newly created action node.
4. Check the settings of the action node and change them as follows, if required.
5. Click on the menu item *Recording Planner > Create/Edit Action Node Configuration* in the toolbar.
6. Select the options *Record and Delete* and *Default*.  
⇒ The detail view *Configuration* opens.

Configuration

Details\*

Type

Record and delete

Name\*

Default

Keep recordings when stream is recognized

☐

Recording Suppression

Suppress recording of external participants

☐

Suppress recording of internal participants

☐

External Recording Control

Allowed clients

☐ API  
☒ CLIENTcommand  
☒ DTMF sequences  
☐ Function keys  
☒ PHONEapp  
☐ SCREENrec  
☐ WEBcommand

Keep recordings

☒

Delete recordings

☒

Only with recording

☐

Wrap-up time

0 Minute(s)

0 Second(s)

Start recordings

☒

Stop recordings

☒

Suppress recordings

☒

Unsuppress recordings

☒

Delete kept recordings

☒ Never  
☐ After
 

0 Year(s)

0 Month(s)

0 Day(s)

0 Hour(s)

0 Minute(s)

Save

Cancel

Fig. 52: Recording Planner - detail view - action node configuration "Record and delete"

7. Activate the check box *Keep recordings when stream is recognized* if only those recordings are supposed to be kept for which an audio stream has been recognized.
8. Activate the following options under *External Recording Control*:

Function keys	Enables you to activate the recording via the function keys of the end devices.
PHONEapp	Enables you to control the recording via the PBX in general.

9. Activate the following options under *Allowed Actions*:

Start/Stop recordings	Allows starting and stopping the recording manually for all clients which have been activated in <i>External recording control</i> .
Suppress/Unsuppress recordings (optional)	Allows suppressing the recording of a running conversation without having to finish it. This function can be applied for all recording formats.



In the action node configuration *Record and Delete*, the option *Delete/Keep recordings* has been activated by default and cannot be deactivated.

10. Click on the button *Save*.
11. Click on the profile and activate the check box *Activated* in the detail view.
12. Click on the button *Save*.

## 12

## External control

Adjust the details for the external control.

There are the following options for the compliance recording plan:

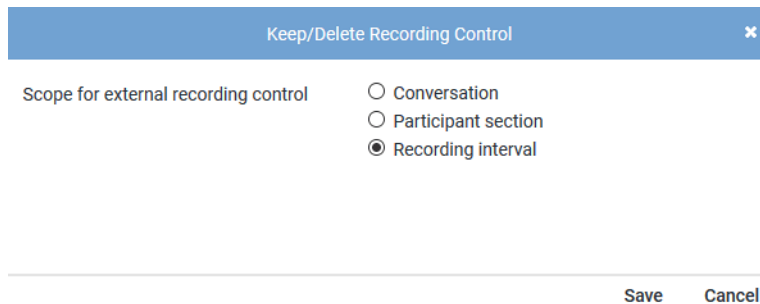


Fig. 53: External recording control compliance recording

- *Conversation*

The control signal applies to the recording of the complete conversation.

- *Participant section*

The control signal applies to the recordings of the view of the participant who has sent the signal. If the participant who has sent the control signal cannot be identified, the signal applies to the complete conversation.

- *Recording interval*

The control signal applies to the last start-stop interval of the external control. In the event of a delete signal, only the recording of the last recording interval is deleted. If there is no start-stop interval of the external control, the signal applies to the complete agent session.



For the integration EVOIP<sub>neo</sub> active for Cisco UCM, the option *Conversation* must be selected to be able to use the keep/delete recording control. If any other option has been selected, the meta data will be retained even if the conversation has been selected for deletion.



If the external control is executed via **DTMF**, the participant who has sent the signal usually cannot be identified.

There are the following options for the QM recording plan:

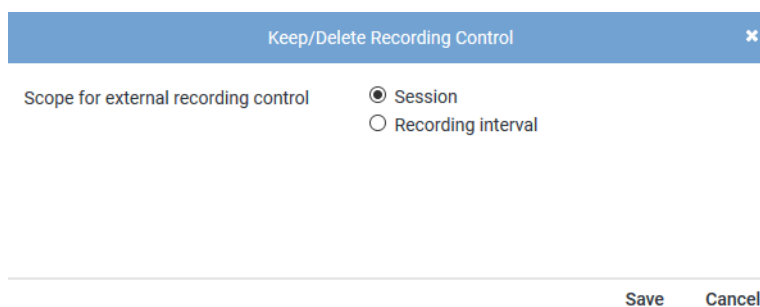


Fig. 54: External Recording Control QM

- *Session*

The signal applies to the recordings for the complete session.

- *Recording interval*

The control signal applies to the last start-stop interval of the external control. In the event of a delete signal, only the recording of the last recording interval is deleted. If there is no start-stop interval of the external control, the signal applies to the complete agent session.



---

If you are not sure which settings to select, then leave the default setting, since it produces the largest number of recordings.

---



## 13

## Define DTMF sequences

Here, you can define the **DTMF** sequences. The defined character combination enables the agent to directly access the recording control.

DTMF Sequences	
Start recording	*111#
Stop recording	*222#
Keep recording	*555#
Delete recording	*666#
Suppress recordings of all participants	*333#
Unsuppress recording of all participants	*444#
Suppress recordings of internal participants	*3331#
Unsuppress recording of internal participants	*4441#
Suppress recordings of external participants	*3332#
Unsuppress recording of external participants	*4442#

Save
Cancel

Fig. 55: Define DTMF sequences

To allow recording control via **DTMF** sequences, the user has to configure a meaning for the **DTMF** sequences.

A **DTMF** sequence is an arbitrary row of the following characters: 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, A, B, C, D, \*, #.

The following entries are available:

- *Start recording*
- *Stop recording*
- *Keep recording*
- *Delete recording*
- *Suppress recording of all participants*
- *Unsuppress recording of all participants*
- *Suppress recording of internal participants*
- *Unsuppress recording of internal participants*
- *Suppress recording of external participants*
- *Unsuppress recording of external participants*

## 14 Import recording filter

For the control of the recording you can use filters. Filters are created in the filter editor of the application and saved in a filter file. The filter file is transferred to the system by means of the import function in the Recording Planner module. Only **XML** files can be imported. The recording with the imported filter only starts if the set value is recognized in [chapter "Edit recording filter", p. 68](#). The recording starts independently of the recording commands set in the Recording Planner module.

1. Click on the menu item *Recording Planner > Import Recording Filter* in the toolbar.
2. Click on the button *Choose File*.

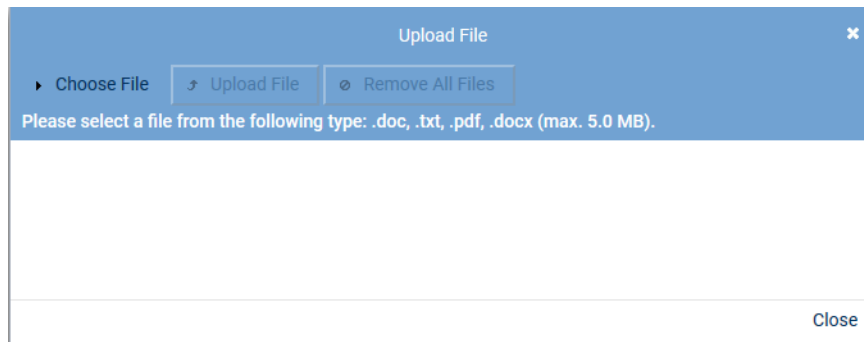




Fig. 56: Select file (example)

3. Select the file via the Explorer and click on the button *Open*.
4. Click on the button  (*Upload file*) to upload the file.  
Click on the button  (*Remove file*) if you would like to remove the selected file and select a different file.

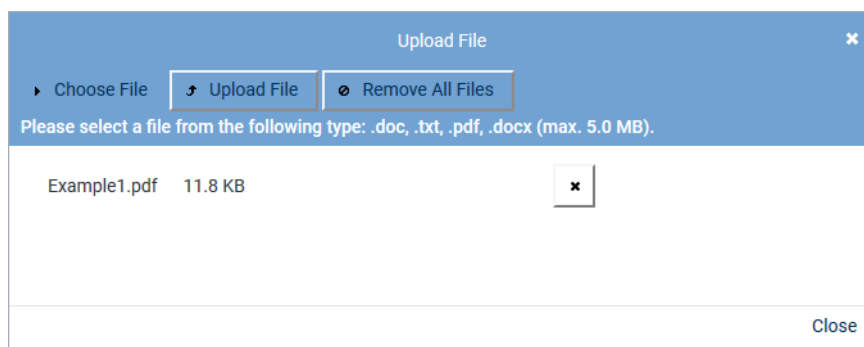


Fig. 57: Upload file (example)

If you are already using a recording filter, the following window appears:

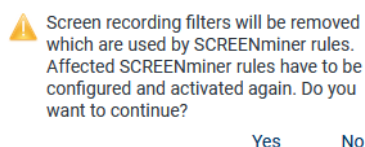


Fig. 58: Overwrite recording filter

5. Click on the button *Yes* if you would like to overwrite the already existing recording filter.  
Click on the button *No* if you would like to continue using the existing recording filter.

The successfully uploaded filter can be edited with the function *Edit Recording Filter*, see [chapter "Edit recording filter", p. 68](#).



You can only import **one** filter file. The imported filter file contains the filter elements which have been created in the application SCREEN<sup>rec</sup> scan Editor; however, only the triggers are visible in the Recording Planner module and can be edited there.

In multi-tenant systems, each tenant can import their own filter file.

In the SCREEN<sup>minor</sup> Rules module, you can define processes once the filter file has been uploaded.



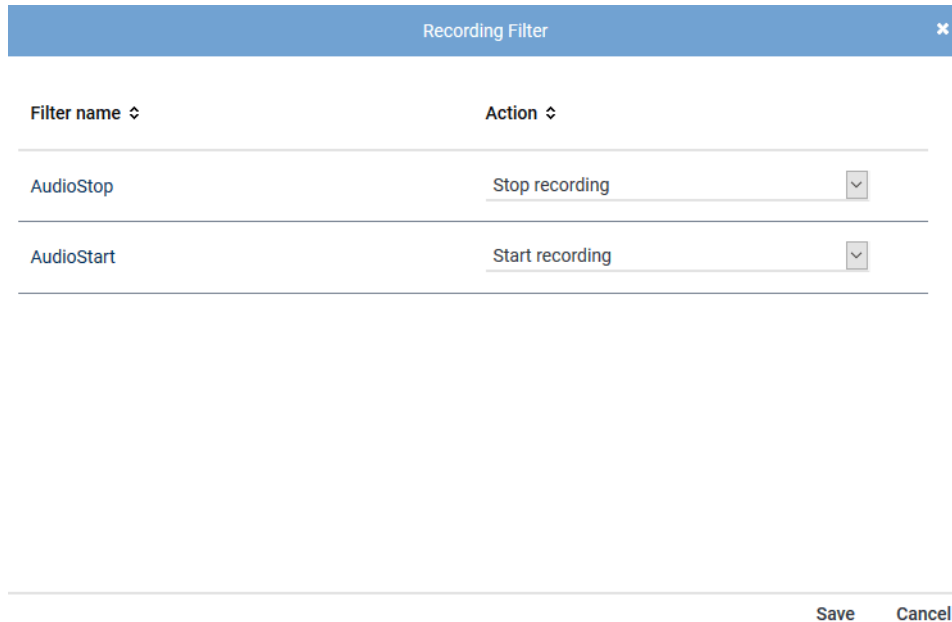
Information about creating filters can be found in the user manual for administrators *SCREEN-rec scan Editor*.



Information about defining process flows can be found in the administration manual for tenants *SCREENminor rules*.

## 15 Edit recording filter

- To edit an imported recording filter and adjust the settings, click on the menu item *Recording Planner > Edit Recording Filter* in the toolbar.  
⇒ The window *Recording Filter* opens.



Filter name ↕	Action ↕
AudioStop	Stop recording ▼
AudioStart	Start recording ▼

Save Cancel

Fig. 59: Edit recording filter

<b>Filter name</b>	Name, which has been used in the filter editor of the application <i>SCREENrec</i> scan Editor as name for the trigger.
<b>Action</b>	<p>Here, you can select the action which is supposed to be triggered. The entered action is executed as soon as the Recording Planner module recognizes the entered filter value.</p> <p>Preconditions:</p> <ul style="list-style-type: none"> <li>- An audio call or a work item is recognized.</li> <li>- The recording plan enables the client <i>SCREENrec</i>.</li> <li>- The recording plan enables a recording.</li> </ul>

- From the drop-down list, select an action for each filter element.

The following actions are available:

none	No action is taken.
Start recording	Recording is started.
Stop recording	Recording is stopped.
Delete recording	Recording is deleted.
Suppress recordings of all participants	No participant is recorded.
Suppress recordings of external participants	No external participants are recorded.
Suppress recordings of internal participants	No internal participants are recorded.
Unsuppress recordings of all participants	All participants are recorded.
Unsuppress recordings of external participants	External participants are recorded.
Unsuppress recordings of internal participants	Internal participants are recorded.
Begin	The screen recording is started independently from an audio call (work item).
End	The screen recording is stopped.

3. To save the changes, click on the button *Save*.  
To discard the changes, click on the button *Cancel*.



---

The recording filter does not take conversations of types [SMS/SDS](#) or chat into account.

---

## 16 Configure differing retention period

In the compliance recording plan as well as in the QM recording plan, the action nodes contain periods after which the recording data is deleted (TTL). That way, an exact time of deletion has already been predefined for every recording.

Contrary to the defined retention period of sessions and conversations, you can configure that additional data is kept longer than the corresponding recording. In the QM recording plan, you can additionally define that evaluated agent sessions are kept longer than the originally defined retention period.

1. Select the Compliance module or the Quality Management module.
2. Click on the menu item *Recording Planner > Configure Differing Deletion Date for Meta Data* in the toolbar.

### Compliance recording plan

1. Activate the option *Keep meta data after deletion of the recordings* and enter a period of time via the fields.
  - ⇒ After the retention period of the recording is over, the additional data is additionally kept for the period defined here.

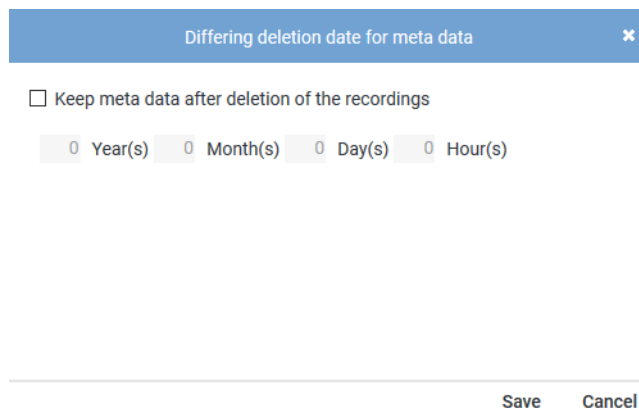


Fig. 60: Differing deletion date compliance recording plan

### QM recording plan

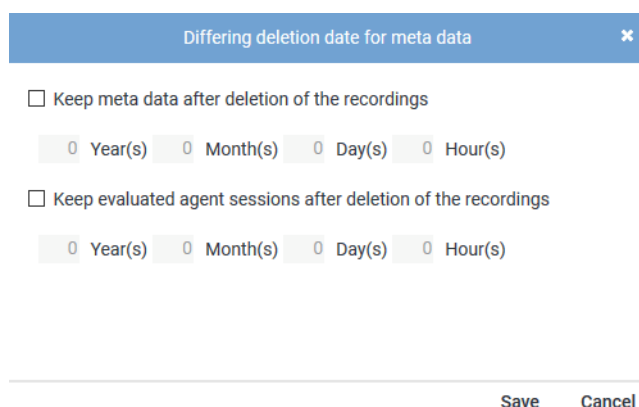


Fig. 61: Differing deletion date QM recording plan

1. Activate the option *Keep additional data after deletion of the recordings* and enter a period of time via the fields to activate an extended retention period for the additional data.
  - ⇒ After the retention period of the recording is over, the additional data is additionally kept for the period defined here.

2. Activate the option *Keep evaluated agent session after deletion of the recordings* and enter a period of time via the fields to activate a longer saving of the sessions (TTL).

⇒ After the retention period of the recording is over, evaluated agent sessions are additionally kept for the period defined here.

If you would like to activate both options, the period of time for the option *Keep evaluated agent sessions after deletion of the recordings* has to be longer than the period in *Keep meta data after deletion of the recordings*.



The time of deletion for a session may differ from the defined setting if the session has been evaluated and differing retention periods have been defined in the Sessions module.



The differing time of deletion is not activated before a corresponding period has been defined.

3. To save the entries, click on the button *Save*.  
To discard entries, click on the button *Cancel*.

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## Glossary

### CSV

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

### DTMF

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

### PBX

Private Branch Exchange

### SDS

Short Data Service (TETRA), text message

### SMS

Short Message Service, text message (GSM, landline)

### TTL

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

### Video recording

A video recording can consist either of a screen video or of any other video.

### XML

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