

# SCREENrec scan Editor



## User manual for tenants

9/13/2021

### Product line neo, version 6.x

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

EVOIPneo

EVOLUTIONneo / XXL / eco

INSPIRATIONneo

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## Contents

<b>1</b>	<b>General information .....</b>	<b>4</b>
<b>2</b>	<b>Introduction .....</b>	<b>5</b>
<b>3</b>	<b>Licenses .....</b>	<b>6</b>
<b>4</b>	<b>Start application .....</b>	<b>7</b>
<b>5</b>	<b>User interface .....</b>	<b>9</b>
5.1	Call up online help.....	10
5.2	Settings .....	10
5.2.1	Change shortcut for component selection.....	10
5.2.2	Load file.....	11
5.2.3	Save file .....	11
5.3	Navigation bar .....	12
5.4	Overview .....	13
5.5	Detail view .....	14
5.5.1	Detail view Filter and Filter type .....	14
5.5.2	Detail view Filter element .....	15
<b>6</b>	<b>Add filter elements .....</b>	<b>18</b>
6.1	Add condition .....	19
6.2	Add tagging trigger .....	20
<b>7</b>	<b>Highlight filter element .....</b>	<b>23</b>
<b>8</b>	<b>Test trigger .....</b>	<b>24</b>
<b>9</b>	<b>Delete filter element .....</b>	<b>25</b>
	<b>List of figures .....</b>	<b>26</b>
	<b>List of tables .....</b>	<b>27</b>
	<b>Glossary .....</b>	<b>28</b>

## 1 General information

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## 2 Introduction

**SCREEN<sub>rec</sub> scan Editor**

SCREEN<sub>rec</sub> scan Editor is an application for action-controlled recording based on activities on the agents' screen.

The SCREEN<sub>rec</sub> scan Editor allows administrators to create filter elements which define which areas of the screen or which activities are supposed to be recorded or blanked during the recording. On top of that, additional data from other applications such as from an CRM software can be transferred automatically to the recording system.

SCREEN<sub>rec</sub> scan Editor is a vendor-independent solution compatible with most CRM, ERP, Office and Windows applications.

The application allows you to:

- define that a certain application is supposed to be recorded when activated on the agent's screen,
- define that a certain application is supposed to be blanked when activated on the agent's screen,
- define that a certain area (e. g. entry fields) of an application is supposed to be blanked when activated on the agent's screen,
- create triggers and conditions for which you can define in the Recording Planner module which actions they are supposed to trigger,
- add tagging information to already created triggers which will be displayed as additional data of the corresponding recording in the Sessions module.

To be able to use the application the user must have administrator rights.



The SCREEN<sub>rec</sub> scan Editor can only be used by an administrator and therefore should not be installed on client computers.



The feature SCREEN<sub>rec</sub> scan Editor is an optional component of SCREEN<sub>rec</sub> and can be selected to be installed during the installation routine.



For information about the installation of SCREEN<sub>rec</sub> refer to the installation manual *Installation SCREEN<sub>rec</sub>*.



To apply the recording filters created with the application SCREEN<sub>rec</sub> scan Editor, they have to be imported in the application System Configuration in the Recording Planner module. In the Recording Planner module, only 1 filter file per tenant can be imported. The imported filter file contains all filter elements which have been created in the application SCREEN<sub>rec</sub> scan Editor; however, only the triggers are visible in the Recording Planner module so that the action that they are supposed to trigger can be defined there.



For information about the configuration of recording plans refer to the administration manual for tenants *System Configuration - Recording Planner*.

## 3 Licenses

To use the SCREENrec scan Editor to create recording filters and triggers, the following license is required:

License name	Number	Description
SCREEN <u>rec</u> scan	1 per client computer	License for the filtered recording of screen activities



Make sure that you have a valid license for all functionalities that you would like to use. If the functionality SCREENrec scan Editor is activated during the installation and there is no valid license for it in the system, then the functionality SCREENrec will not work either.



To use the application SCREENrec scan Editor, customer-specific adjustments may be required.

## Start application

During the installation, a program group is created in the start menu of Windows and a program icon is placed on the desktop.

1. To start the application, click on the program icon of SCREENrec scan Editor Editor and log in as administrator.

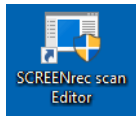


Fig. 1: Program icon

⇒ The window *Load File* appears.

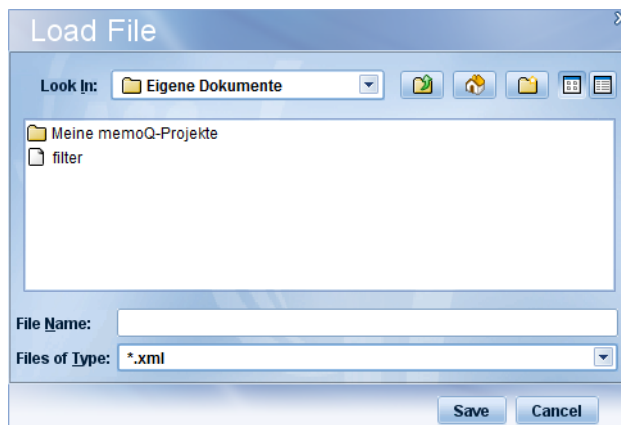


Fig. 2: Load file

2. Via the Explorer, select the file with the recording filter that you have created and saved in the application SCREENrec scan Editor Editor and that you would like to use.




If you click on the button *Cancel*, the recording filter which has been imported in the Recording Planner module is used. If no recording filter has been imported yet, the tree structure in the overview does not contain any filter elements. In both cases, you can add new filter elements, see [chapter "Add filter elements", p. 18](#).




3. Click on the button *Open*.





⇒ The application is started and the icon  (*SCREENrec scan Editor*) appears in the Windows system tray.



The functionality SCREENrec scan Editor is installed together with the functionality SCREENrec. Provided that the application has not been installed in stealth mode, this means that as long as you do **not** use the application SCREENrec scan Editor Editor, the Windows system tray displays icons which display the status of SCREENrec. Upon successfully logging in on the SCREENrec scan Editor Editor, exclusively the icon  (*SCREENrec scan Editor*) will be visible.

The following statuses of the applications SCREENrec and SCREENrec scan Editor Editor are possible:

 ( <i>SCREENrec scan Editor</i> )	The application SCREENrec scan Editor Editor is open.
 ( <i>SCREENrec - connecting...</i> )	The network connection to the recording server is being established.
 ( <i>SCREENrec - connected</i> )	The network connection to the recording server has been established.

 (SCREENrec - disconnected)	No connection to the recording server could be established; this can be the case if no employee has been mapped to the application SCREENrec in the application System Configuration. Once the underlying problem has been solved, the SCREENrec must be restarted.
 (SCREENrec - online)	The network connection to the recording server has been established and the application SCREENrec has successfully registered on the recording server; in this case the agent's screen is recorded according to the recording plan defined in the Recording Planner module and to the recording filter imported there.
 (SCREENrec - recording)	The agent's screen is being recorded.
 (SCREENrec - hidden)	The application SCREENrec records a black screen due to the command to mute a participant or to suppress the recording.

Right-clicking on the icon in the Windows system tray opens a context menu which allows you to view information on the software version, to change the language, and to - provided you have logged in on the application SCREENrec scan Editor Editor - log off from the application.



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



## 5 User interface

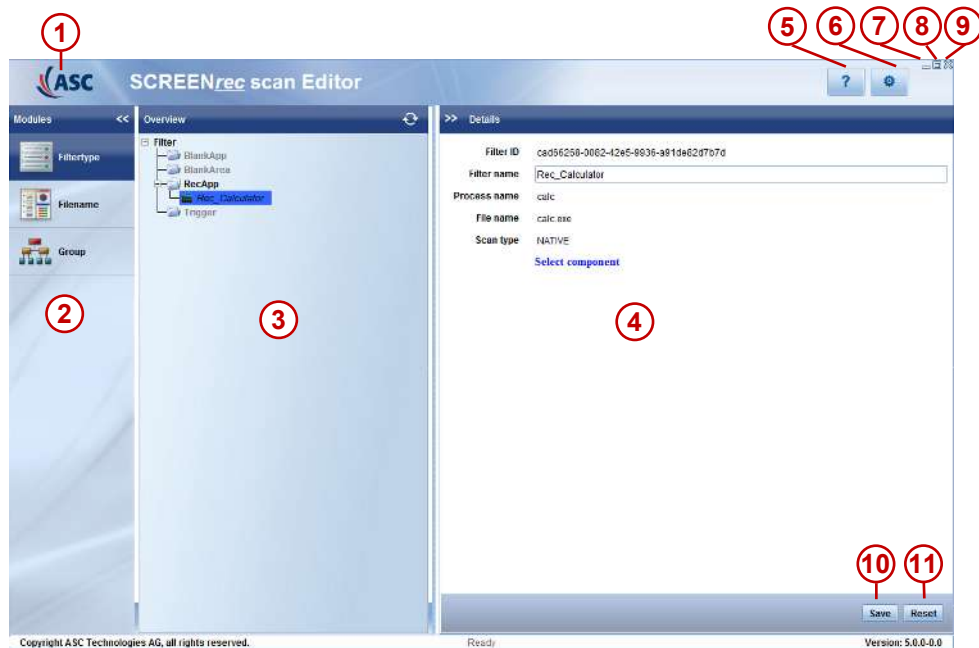












Fig. 3: Welcome screen

1		The tooltip displays the version of the application SCREENrec scan Editor Editor.
2	Navigation bar	Contains the individual modules, see <a href="#">chapter "Navigation bar", p. 12.</a>
3	Overview	Displays an overview of the filter with the available, subordinated filter types and filter elements which have possibly been created below them, see <a href="#">chapter "Overview", p. 13.</a>
4	Detail view	Contains detailed information about the selected element of the overview, see <a href="#">chapter "Detail view", p. 14.</a>
5	 (Help)	Opens the online help, see <a href="#">chapter "Call up online help", p. 10.</a>
6	 (Settings)	Opens a context menu to configure the application SCREENrec scan Editor Editor, see <a href="#">chapter "Settings", p. 10.</a>
7	 (Minimize)	Minimizes the on-screen display to the program icon in the taskbar.
8	 (Maximize)	 = Maximizes the on-screen display to full-screen size.  = reduces the on-screen display.
9	 (Close)	Closes the window of the application SCREENrec scan Editor Editor. Before the application is closed, you are prompted to save your changes. Confirm the security prompt to close the window.
10		Saves the changes made in the current filter element. <b>WARNING!</b> This does not replace saving the filter file locally! If you leave the application without saving the changes to the filter in a filter file locally, the changes of the current session are discarded nonetheless.

11  Resets the changes made in the current filter element.

### 5.1 Call up online help


1. Click on the icon  (*Help*).

⇒ The online help is opened.

There are the following options to navigate in the online help:

- Navigation bar on the left of the window
- Contents (via the menu item *Contents* in the header)
- Cross reference to additional information at the bottom of the page

### 5.2 Settings

1. Click on the icon  (*Settings*) to call up the options to configure the SCREENrec scan Editor Editor.

⇒ A context menu with the following options appears:

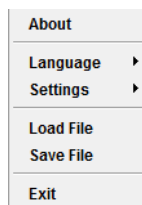



Fig. 4: Settings

- *About*  
Opens a window with information about the version of the software.
- *Language*  
Opens a context menu via which you can select the language of the user interface.
- *Preferences*  
Opens the menu item *Change Shortcut for Component Selection* which opens a window in which you can change the shortcut to select the component, see [chapter "Change shortcut for component selection", p. 10](#). Default setting: *Alt+k*.
- *Load File*  
Opens a window via which you can load the filter file with the saved filter elements. To do so, select the file via the Explorer, see [chapter "Load file", p. 11](#).
- *Save File*  
Opens a window via which you can save the filter elements that you have created in the application SCREENrec scan Editor Editor in a filter file, see [chapter "Save file", p. 11](#).
- *Exit*  
Via this menu item you can log off from the application. You can save the filter settings you have made before exiting, see [chapter "Save file", p. 11](#).

#### 5.2.1 Change shortcut for component selection

1. To change the shortcut which allows you to select the respective component when creating filter elements, click on the icon  (*Settings*) in the toolbar.
2. In the context menu, click on the menu item *Settings*.
3. Click on the sub-menu item *Change Shortcut for Component Selection*.  
⇒ The following window appears:

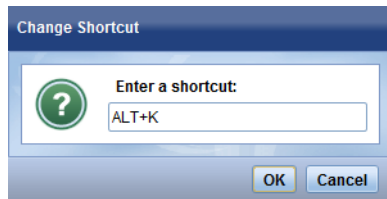




Fig. 5: Change shortcut

4. Enter the new shortcut.
5. Click on the button *OK* to save the change and to close the window.

### 5.2.2

#### Load file

If you have started the application without uploading a saved filter file or if you would like to select a different filter file, you can do so at a later moment by clicking on the icon  (*Settings*).

1. Click on the icon  (*Settings*) in the toolbar.
  2. Click on the menu item *Load File* in the context menu.
- ⇒ The window *Load File* appears.

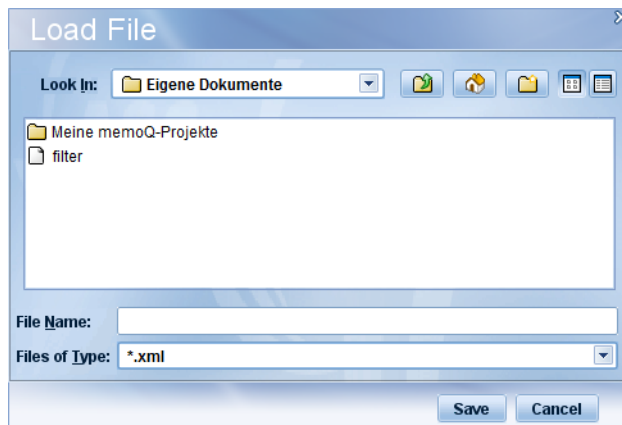



Fig. 6: Load file

3. Select the filter file you would like to load in the respective source directory.
  4. Click on the button *Open*.
- ⇒ The filter file is loaded in the application SCREENrec scan Editor Editor and can be edited.

### 5.2.3

#### Save file

1. To save the filter elements you have created in the SCREENrec scan Editor Editor in a filter file, click on the icon  (*Settings*) in the toolbar.
  2. Click on the menu item *Save File* in the context menu.
- ⇒ The window *Save* appears.

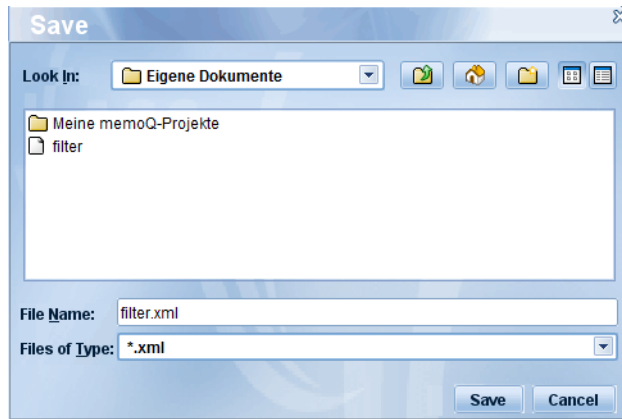


Fig. 7: Save file

3. Select the storage location via the Explorer.
4. Enter a file name.
5. Click on the button **Save** to save the created filter elements in a filter file.



*filter.xml* has been preset as file name. If another filter file has been saved under this name, then it will be overwritten by the new filter settings upon saving. Change the name of the filter file in the field *File Name* if you would like to save several files to be able to use different filter settings when required.

### 5.3

#### Navigation bar

The individual modules of the application are displayed in the navigation bar. They serve as an alternative view of the created filter. Creating and editing filter elements works the same way in all modules, see [chapter "Add filter elements", p. 18](#) and [chapter "Detail view Filter element", p. 15](#).

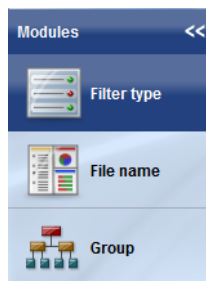


Fig. 8: Navigation bar

#### Short description of the modules

<i>Filter type</i>	<p>The filter elements are sorted by their type.</p> <p>You can:</p> <ul style="list-style-type: none"> <li>• add new filter elements,</li> <li>• add conditions to existing filter elements,</li> <li>• highlight existing filter elements,</li> <li>• delete existing filter elements.</li> </ul>
<i>File name</i>	<p>The filter elements are sorted by the application that the filter elements refer to. You can administrate existing filter elements and add new ones.</p>
<i>Group</i>	<p>You can administrate the filter elements in groups and add new ones.</p>

Tab. 1: Module descriptions

## 5.4 Overview

The overview is laid out in a tree structure. Under the menu item *Filter*, you see the available filter types. Under these filter types you see the individual filter elements which have been created for the respective type.

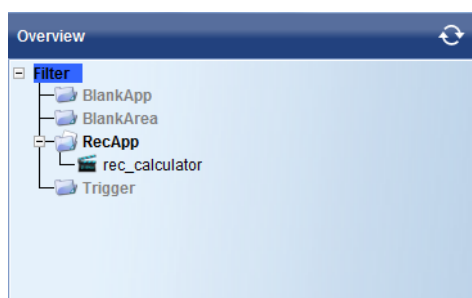


Fig. 9: Overview

<i>Filter</i>	Container for the individual filter elements which will later control the screen recording. The filter can be saved as configuration file (see <a href="#">chapter "Save file", p. 11</a> ) and imported in the application System Configuration in the Recording Planner module to use the created recording filters.
Filter types	<ul style="list-style-type: none"> <li>• <i>BlankApp</i> If the agent opens the application that such a filter has been set to, then the entire application is blanked during the recording. Example: Blanking individual applications in a bulk recording profile.</li> <li>• <i>BlankArea</i> If the area is displayed on the screen that such a filter has been set to, then this area is blanked during the recording. Example: Entering sensitive data in an online form.</li> <li>• <i>RecApp</i> If the agent opens the application that such a filter has been set to, then <b>only this</b> application is recorded. If several applications are supposed to be recorded, a RecApp filter element has to be created for each of the applications to be recorded. If a RecApp filter has been created, creating BlankApp filters is superfluous since besides the application defined in the RecApp filter no other applications are recorded.</li> <li>• <i>Trigger</i> Defines an action on the screen which for its part is supposed to trigger another certain action with regards to the recording. The action that the trigger is supposed to initiate has to be configured in the application System Configuration in the Recording Planner module. Example: The agent enters sensitive customer data in a text field in a certain application. This action on the screen can be used as a trigger for which you can define in the Recording Planner module that it is supposed to stop the recording to exclude these data from being recorded.</li> </ul>

Tab. 2: Elements of the overview



(Refresh)

The application SCREENrec scan Editor Editor synchronizes the filter elements with the modules and processes which are responsible for the scan process. For each scan type, there is one module or process. The modules receive the current filter configuration and give a feedback to the SCREENrec scan Editor Editor whether the applications for which filter elements have been created are available.

Tab. 3: Icons of the overview

## 5.5 Detail view

Which information is displayed in which way in the detail view depends on the level of the structure tree in the overview that you are currently in.

### 5.5.1 Detail view Filter and Filter type

If you have selected the *Filter* or the directory *Filter type*, *Trigger* or *Condition*, the detail view is displayed in a table which can consist of the following columns:

>> Details							
Filter name	Process name	File name	Scan type	Type	Has tagging	Has conditions	
Test-Trigger	calc	calc.exe	NATIVE	BUTTON_PRESS	<input type="checkbox"/>	<input type="checkbox"/>	

Fig. 10: Detail view Filter type (example by means of the filter type Trigger)

<b>Filter type</b>	(Only visible of the level <i>Filter</i> ) Displays the filter types for which filter elements have been created in this filter configuration, see table <i>Elements of the overview</i> in <a href="#">chapter "Overview", p. 13</a> .
<b>Filter name</b>	Displays the name of the selected filter element.
<b>Process name</b>	Name of the application that the filter element has been set to.
<b>File name</b>	Name of the executing file which starts the application.
<b>Scan type</b>	Displays the scan type of the selected filter element. There are the following scan types: <ul style="list-style-type: none"> <li>NATIVE: Application software and programs which are installed on the client computer.</li> <li>JAVA: Java-based application programs.</li> <li>WEB: Application programs which are displayed and operated in a web browser via a web site (currently not supported).</li> </ul>
<b>Type</b>	(Depending on whether you are on the level <i>Trigger</i> , <i>Condition</i> , or <i>Tagging</i> , the column <i>Trigger type</i> , <i>Condition type</i> or <i>Tagging type</i> is displayed.) Displays the type of the selected directory. Depending on the selected directory, the following types are available: <ul style="list-style-type: none"> <li>BUTTON_PRESS Clicking on a certain button serves as trigger or condition.</li> <li>CHECKBOX_SELECT An activated check box serves as trigger or condition.</li> <li>CHECKBOX_NOTSELECT A deactivated check box serves as trigger or condition.</li> <li>CHECKBOX_TOGGLE The change of the state of a check box serves as trigger or condition.</li> <li>TEXT_CONTAINED Entering a predefined content into a certain field serves as trigger or condition. This content may be surrounded by other content. Example: If the word <i>Cancel</i> has been defined as text, then the trigger will be released as well if <i>Cancellation</i> or <i>Canceling</i> is entered into the defined field. The trigger will not be released if only the surrounding context changes but the trigger word remains in the field.</li> <li>TEXT_NOTCONTAINED The absence of predefined content in a certain field serves as trigger or condition. The trigger will not be released if only the surrounding context changes but the predefined content continues to be missing in the field.</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>TEXT_EQUALS</b> Entering a predefined content into a certain field serves as trigger or condition. The content must be identical. Example: If the word <i>cancellation</i> has been defined as text, then the trigger is not released if <i>cancel</i> is entered in the defined field but only if exactly and exclusively <i>cancellation</i> is entered. <b>NOTICE!</b> No difference is made between upper or lower case letters. However, please consider that the complete content of the field is taken into account when deciding whether the trigger is released: i. e. control characters which are not visible in the entry field but contained nonetheless (e. g. a line break) may be the decisive criterion whether a trigger configuration works as it was intended.</li> <li>• <b>TEXT_NOTEQUALS</b> Entering content into a certain field which differs from the predefined content serves as trigger or condition. <b>NOTICE!</b> Please consider that the complete content of the field is taken into account when deciding whether the trigger is released: i. e. control characters which are not visible in the entry field but contained nonetheless (e. g. a line break) may be the decisive criterion whether a trigger configuration works as it was intended.</li> <li>• <b>TEXT</b> The tagging information which is uploaded to the server is displayed as text as the additional data of the corresponding recording.</li> </ul>
<i>Has tagging</i>	(Only visible of the level <i>Trigger</i> )  Displays whether this trigger uploads tagging information as additional data of the corresponding recording.
<i>Has conditions</i>	(Only visible of the level <i>Trigger</i> )  Displays whether conditions have been created for this filter.

### 5.5.2

#### Detail view Filter element

If you select a filter element under a filter type, a general section is displayed in the detail view which displays the following information depending on the selected filter element:



>> Details

Filter ID: 0f5c32db-f14b-4a1e-a825-a7293fec702

Filter name: Entry calc

Process name: calc

File name: calc.exe

Scan type: NATIVE

Component type: UNIVERSAL

Component ID: -1;50032;00000;CalcFrameID;50033;00000;CalcFrameID;1;50033;00000;#32770/2;50020;150;Static

Select component

Fig. 11: Detail view - general section (example)

<i>Filter ID</i>	Displays the filter ID.
<i>Filter name</i>	Name of the filter element.  Use a descriptive filter name. Using names which reflect the function and purpose of the filter element facilitates defining the correct action that they are supposed to trigger later on in the Recording Planner module.
<i>Process name</i>	Name of the application that the filter element has been set to.
<i>File name</i>	Name of the executing file which starts the application.
<i>Scan type</i>	Displays the scan type of the selected filter element. There are the following scan types:

	<ul style="list-style-type: none"> <li>• NATIVE: Application software and programs which are installed on the client computer.</li> <li>• JAVA: Java-based application programs.</li> <li>• WEB: Application programs which are displayed and operated in a web browser via a web site (currently not supported)</li> </ul>
<b>Component type</b>	(Only available for elements of the filter types <i>BlankArea</i> , <i>Condition</i> , <i>Trigger</i> and <i>Tagging</i> ) Displays the component type. Possible component types are: <ul style="list-style-type: none"> <li>• UNIVERSAL: Component which is selected via the shortcut.</li> <li>• CUSTOM: individual component which can only be created with developing support.</li> </ul>
<b>Component ID</b>	(Only available for elements of the filter types <i>BlankArea</i> , <i>Condition</i> , <i>Trigger</i> and <i>Tagging</i> ) Displays the component ID which allows SCREENrec to find the application even if it has been closed and opened again. If you change the component via the button <i>Change component</i> , the component ID changes automatically.

Depending on the filter type that the filter element belongs to, specific group fields are displayed.

### Specific details for triggers

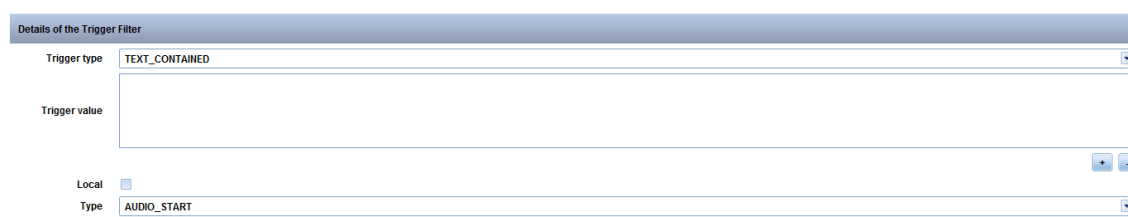


Fig. 12: Group field Details of the trigger filter (example)

<b>Trigger type</b>	Displays the trigger type. The following trigger types are available: <ul style="list-style-type: none"> <li>• BUTTON_PRESS</li> <li>• CHECKBOX_SELECT</li> <li>• CHECKBOX_NOTSELECT</li> <li>• CHECKBOX_TOGGLE</li> <li>• TEXT_CONTAINED</li> <li>• TEXT_NOTCONTAINED</li> <li>• TEXT_EQUALS</li> <li>• TEXT_NOTEQUALS</li> </ul>
<b>Trigger value</b>	(Only available for the trigger types <i>TEXT_</i> ) Displays the value or the values which must be contained or not contained in a certain field so that the trigger is released.
<b>Local</b>	Shows whether a local action such as starting an audio recording is supposed to be triggered.



	<input checked="" type="checkbox"/> = A local action is triggered. <input type="checkbox"/> = Instead of triggering a local action, the trigger is sent to the server and the action configured in the Recording Planner module is triggered. <b>NOTICE!</b> In the recording plan in the Recording Planner module, the conversation type <i>work item</i> must be selected.
Type	Shows the trigger types for SCREEN <sub>rec</sub> audio: <ul style="list-style-type: none"> <li>AUDIO_START</li> <li>AUDIO_STOP</li> </ul>

### Specific details for conditions



Fig. 13: Details of the condition filter (example)

Condition type	Shows the type of the condition. The following condition types are available: <ul style="list-style-type: none"> <li>CHECKBOX_SELECT</li> <li>CHECKBOX_NOTSELECT</li> <li>TEXT_CONTAINED</li> <li>TEXT_NOTCONTAINED</li> <li>TEXT_EQUALS</li> <li>TEXT_NOTEQUALS</li> </ul>
Global	Shows whether the trigger is supposed to be released if the condition is fulfilled in any instance of the application or only if it is fulfilled in the instance of the application for which you have created this condition. <input type="checkbox"/> = Trigger is only released if the condition is fulfilled in the same instance in which the trigger action took place. <input checked="" type="checkbox"/> = Trigger is released if the condition is fulfilled in any instance of the application regardless of the instance in which the trigger action took place.
Condition value	(Only available for the trigger type <i>TEXT_</i> ) Displays the value which must be contained or not contained in a certain field so that the trigger is released.

### Specific details for taggings



Fig. 14: Details of the tagging filter (example)

Tagging type	<ul style="list-style-type: none"> <li>TEXT: The tagging information is uploaded to the server as text to be displayed as the additional data of the corresponding recording.</li> </ul>
--------------	--

By clicking on the buttons *Save* and *Reset* the changes of the created filters are saved or discarded.

## 6

## Add filter elements

1. In the overview, right-click on the filter type for which you would like to create a filter element.

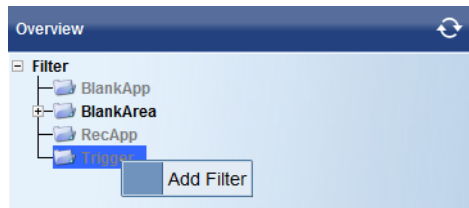


Fig. 15: Add filter element

2. Select the menu item *Add Filter* in the context menu.
  - ⇒ The following dialog window appears. Which fields are available depends on the selected filter type.

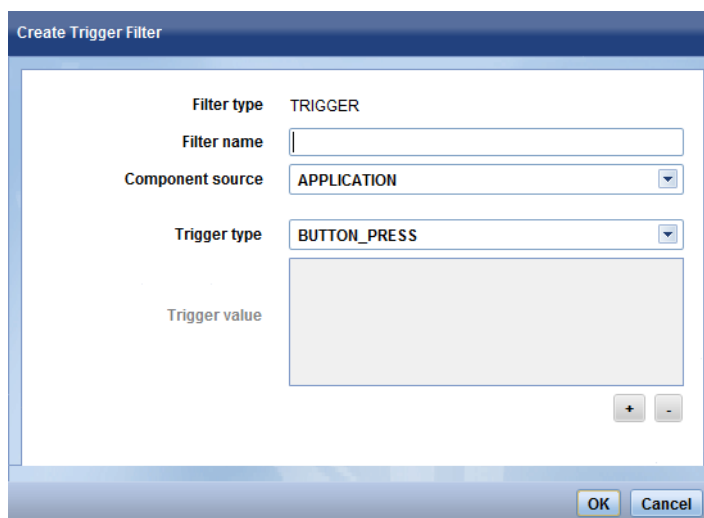


Fig. 16: Dialog window Add Filter (example)

<i>Filter type</i>	Displays the filter type of the filter element.
<i>Filter name</i>	Enter a descriptive name for the filter element. <b>NOTICE!</b> Do not use umlauts in the filter name!
<i>Component source</i>	Select one of the following component sources from the drop-down list: <ul style="list-style-type: none"> <li>• APPLICATION</li> <li>• WEB (not yet available)</li> </ul>
<i>Type</i>	(Only available for the filter elements of the type <i>Trigger</i> , <i>Condition</i> and <i>Tagging</i> .) Select the type of the filter element from the drop-down list.
<i>Value</i>	(Only available for the filter elements of the type <i>Trigger</i> and <i>Condition</i> .) Via the button <b>+</b> enter a value in the opening entry field the presence of which is to serve as the trigger in the filtered field. (Only available if the type TEXT_ has been selected.)

3. To save the settings, click on the button *OK*.  
To discard the settings, click on the button *Cancel*.

4. Hover the mouse cursor over the component you would like to select. Components, applications, and areas which can be selected are highlighted in green. Components, applications, and areas which cannot be selected for the respective filter element are highlighted in red. Press the shortcut to select the component, see [chapter "Change shortcut for component selection", p. 10](#).
- ⇒ The new filter element is created in the tree structure under the filter type.
5. To edit the created filter element, select it in the overview and make the changes in the detail view, see [chapter "Detail view Filter element", p. 15](#).

## 6.1 Add condition

You can add a condition to the created filter element.

**Example:** On the agent's screen an application to capture customer data is recorded. Recording is required to verify whether the processes run efficiently. Since some of the customer data are sensitive, the recording is supposed to be stopped in certain cases. If the agent clicks on the button *Search* (trigger) the recording continues. If a condition has been created for the filter element *trigger*, e. g. the search term *account number* in the search field of the application, you can configure in the Recording Planner module that the recording is supposed to be stopped if the agent clicks on the button *Search* while the term *account number* has been entered in the search field of the application.

In case the search term *account number* is removed from the search field of the application, another trigger with a condition has to be created for which you have to configure in the Recording Planner module that the recording is supposed to be resumed.

1. To add a condition to a filter element, right-click on the filter element.

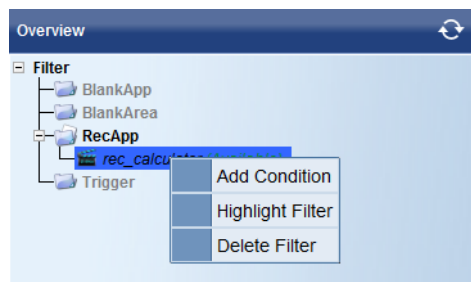


Fig. 17: Add condition

2. Select the menu item *Add Condition* in the context menu.
- ⇒ The following dialog window appears:

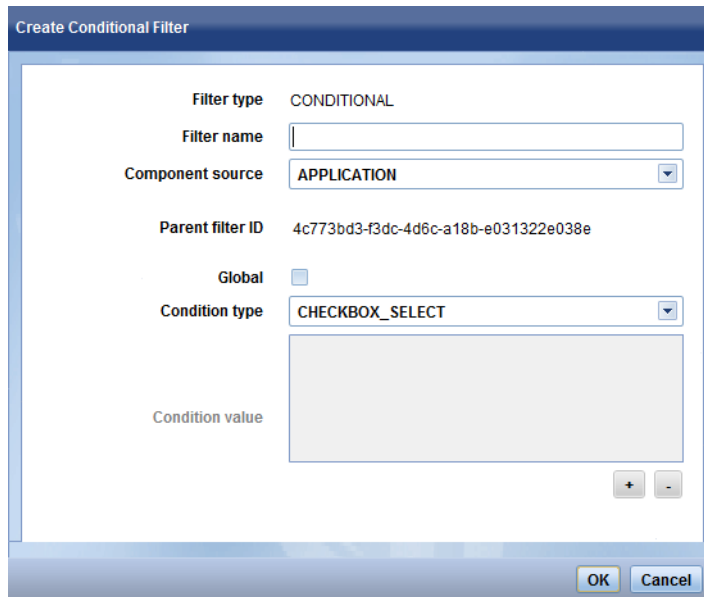



Fig. 18: Add condition

<i>Filter type</i>	Displays the filter type.
<i>Filter name</i>	Enter a descriptive filter name. <b>NOTICE!</b> Do not use umlauts in the filter name!
<i>Component source</i>	Select the component source from the drop-down list.
<i>Parent filter ID</i>	Displays the <a href="#">UUID</a> of the trigger for which this condition has been created.
<i>Global</i>	Select whether the condition is supposed to be valid globally, see Specific details for conditions in <a href="#">chapter "Detail view Filter element", p. 15</a> .
<i>Condition type</i>	Select the condition type from the drop-down list.
<i>Condition value</i>	For conditions of the type <i>TEXT_</i> add a condition value in the opening entry field via the button  . If this value is found in the filtered field, it is considered the condition for the trigger to be released.

- To save the settings, click on the button *OK*.  
To discard the settings, click on the button *Cancel*.

## 6.2 Add tagging trigger

You can add tagging information (e. g. the name of the company or a process number) to created triggers which will be displayed in the additional data of the corresponding recording in the Session module under customCP. To do so, a JSON object with a valid [UUID](#) in the following format must be posted to the web address `http://localhost:1339/tagging: { "id" : "0e84bb30-d2ac-4654-ab37-86d81dfae3c2", "value" : "1234" }`. The filter ID is mapped to the custom field in the configuration file `ASC.RecordingControl.ini`.

**NOTICE!** To create a valid [UUID](#), an online [UUID](#) generator can be used.

### Example:

#### Create JSON object

For a recording the name of the company (Company XYZ) as well as a process number (21-A-12345) is supposed to be available as additional data.

For this purpose, the JSON objects with the exemplary [UUIDs](#) are used:

- { "id" : "91dbe5ad-5acc-4834-803e-55d01ca689bd", "value" : "Company XYZ" }
- { "id" : "54ee2212-915e-4d1d-8825-e421d0144aa8", "value" : "21-A-12345" }

#### Configure additional data fields

In the Additional Data module of the application System Configuration, the additional data fields *customCP01* and *customCP02* must have been configured where the tagging information will be displayed.



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

### Configure .ini file

Map the **UUID** to the corresponding additional data field. To do so, proceed as follows:

1. Open the Windows Explorer.
2. Change to the installation directory of the recording software C:\Program Files (x86)\ASC\ASC Product Suite\data\RecordingControl.
3. Open the configuration file ASC.RecordingControl.ini to be edited in an Editor, e. g. *Notepad*.
4. Configure the following parameter:  
 [ScreenTagger]  
 91dbe5ad-5acc-4834-803e-55d01ca689bd=CALLER  
 54ee2212-915e-4d1d-8825-e421d0144aa8=customCP01

### Create trigger filter

1. Right-click on the trigger that you would like to add the tagging information to.

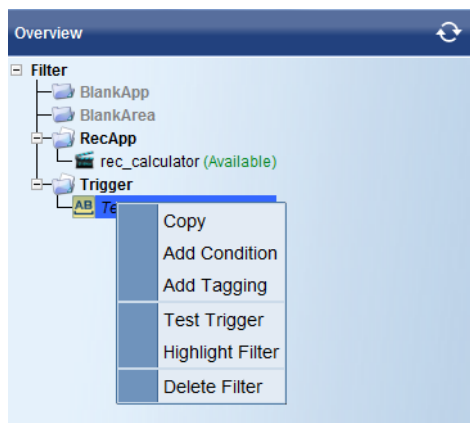
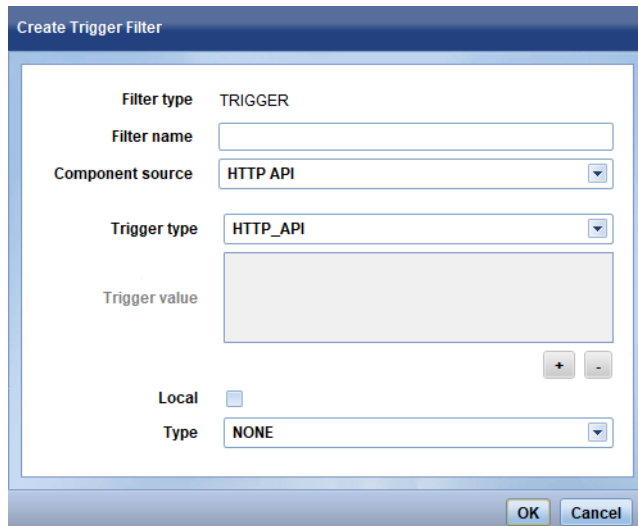


Fig. 19: Add tagging

2. In the context menu, select the menu item *Add tagging*.  
 ⇒ The following dialog window appears:



The 'Create Trigger Filter' dialog box contains the following fields and controls:

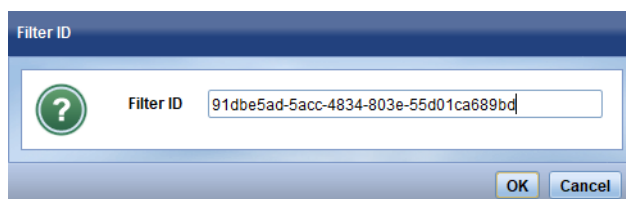
- Filter type:** A dropdown menu set to 'TRIGGER'.
- Filter name:** An empty text input field.
- Component source:** A dropdown menu set to 'HTTP API'.
- Trigger type:** A dropdown menu set to 'HTTP\_API'.
- Trigger value:** A large empty text area with '+' and '-' buttons on the right.
- Local:** An unchecked checkbox.
- Type:** A dropdown menu set to 'NONE'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Fig. 20: Create HTTP API trigger (example)

<i>Filter type</i>	Displays the filter type.
<i>Filter name</i>	Enter a descriptive filter name. <b>NOTICE!</b> Do not use umlauts in the filter name!
<i>Component source</i>	Select the component source <i>HTTP API</i> from the drop-down list.
<i>Trigger type</i>	The trigger type is filled automatically when selecting the component source.
<i>Trigger value</i>	Not relevant here. Only available for the trigger types <i>TEXT_</i> .
<i>Local</i>	<input type="checkbox"/> = The trigger is sent to the server and the respective action configured in the Recording Planner is executed. <input checked="" type="checkbox"/> = The trigger executes a local action such as <i>AUDIO_START</i> or <i>AUDIO_STOP</i> , not relevant here.
<i>Type</i>	Not relevant here. Only available for local triggers.

- To save the settings, click on the button **OK**.

⇒ The window *Filter ID* appears:



The 'Filter ID' dialog box contains the following elements:

- Filter ID:** A text input field containing the UUID '91dbe5ad-5acc-4834-803e-55d01ca689bd'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Fig. 21: Enter filter ID

- Enter a **UUID**. The **UUID** can be selected arbitrarily but it must be unambiguous and comply with the **UUID** format.
- To save the settings, click on the button **OK**.  
To discard the settings, click on the button **Cancel**.

### Test HTTP API trigger

There is a test function for the HTTP API. To test the trigger, open the file *client.properties* to set the parameter *core.debug.mode=true* and then restart the SCREENrec client. Via *http://localhost:1339/static/posttest.html*, a page to test the HTTP API is available.

## Highlight filter element

You can highlight the component that the filter element filters to find out the application it refers to.

1. To do so, right-click on the filter that you would like to highlight.

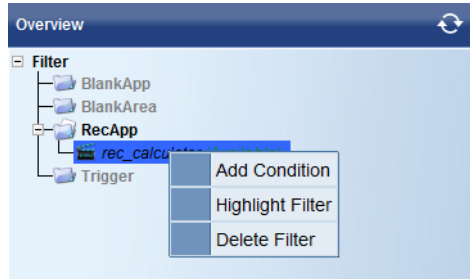



Fig. 22: Highlight filter

2. Select the menu item *Highlight Filter* in the context menu.
- ⇒ The application or the area of the application that the corresponding filter refers to is highlighted on the screen by means of a blinking green rectangle.



If you have loaded a filter in the application SCREENrec scan Editor Editor which filters an application which has not been opened before the start of the application SCREENrec scan Editor Editor, you have to click on the icon  (*Refresh*) in the overview of the SCREENrec scan Editor so that the filter element can be highlighted.

## Test trigger

You can test the created trigger to make sure that the trigger releases the appropriate reaction.

1. To do so, right-click on the trigger that you would like to test.

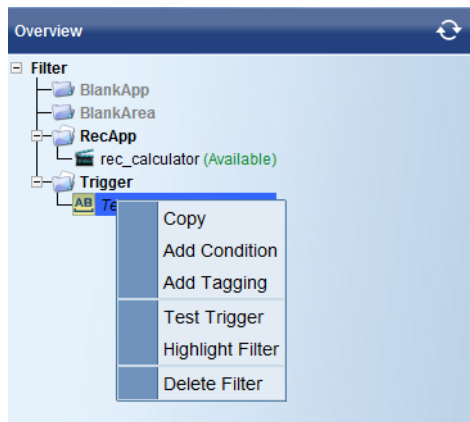


Fig. 23: Test trigger

2. Select the menu item *Test Trigger* in the context menu.
  3. Release the defined trigger.
- ⇒ You receive the message that the trigger has been received.



## Delete filter element

1. To delete the created filter element, right-click on the respective filter element.

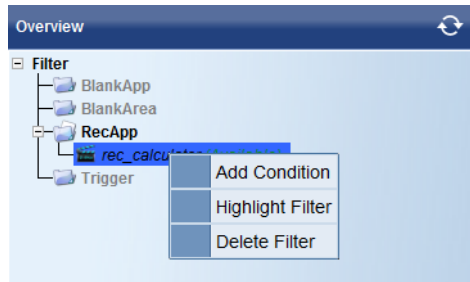


Fig. 24: Highlight filter

2. Select the menu item *Delete Filter* in the context menu and confirm the security prompt.  
⇒ The selected filter element is deleted.

**List of figures**

Fig. 1	Program icon .....	7
Fig. 2	Load file.....	7
Fig. 3	Welcome screen .....	9
Fig. 4	Settings .....	10
Fig. 5	Change shortcut.....	11
Fig. 6	Load file.....	11
Fig. 7	Save file .....	12
Fig. 8	Navigation bar .....	12
Fig. 9	Overview .....	13
Fig. 10	Detail view Filter type (example by means of the filter type Trigger) .....	14
Fig. 11	Detail view - general section (example) .....	15
Fig. 12	Group field Details of the trigger filter (example).....	16
Fig. 13	Details of the condition filter (example) .....	17
Fig. 14	Details of the tagging filter (example).....	17
Fig. 15	Add filter element .....	18
Fig. 16	Dialog window Add Filter (example).....	18
Fig. 17	Add condition .....	19
Fig. 18	Add condition .....	20
Fig. 19	Add tagging .....	21
Fig. 20	Create HTTP API trigger (example).....	22
Fig. 21	Enter filter ID .....	22
Fig. 22	Highlight filter .....	23
Fig. 23	Test trigger .....	24
Fig. 24	Highlight filter .....	25

### List of tables

Tab. 1	Module descriptions .....	12
Tab. 2	Elements of the overview .....	13
Tab. 3	Icons of the overview .....	13

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## Glossary

### CRM

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Customer Relationship Management

### ERP

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Enterprise Resource Planning

### UUID

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