

# System Configuration

## Import of configuration data



## Administration manual

### for system providers and tenants

10/25/2021

### 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

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

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



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

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



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

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

For the import of results of Call Director customer surveys further preconditions have to be met, see [chapter "Call Director customer surveys", p. 60](#).

## 3 Supported import formats

The following data can be imported:

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

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

The following import functions can be found in this manual:

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

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

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

## 4 Default XSLT files

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

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

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

### XSLT files for the migration

- *AgentV10ToNeoXSLT.xslt*

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

Purpose of use: import of agent data from a recording server version 10

- *UserV10ToNeoXSLT.xslt*

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

Purpose of use: import of employee data from a recording server version 10

### XSLT files for the import of phone configurations

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

- *PhoneCloneRegProb.xslt*

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

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

- *PhoneSimple.xslt*

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

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

- *IPPhoneWithPhoneNumberInsteadOfExtension.xslt*

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

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

### Additional XSLT files

- *Identity.xslt*

Can be used for all import object types

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

- *Call\_Director\_CUSTOMCP01.xslt*

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

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

**NOTICE!** This XSLT file serves as a template example only. It has to be adjusted individually for each Call Director customer survey, see [chapter "Call Director customer surveys", p. 60](#).

- *XSLTForLDAP\_ActiveDirectory.xslt*

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

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

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

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

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

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

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

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

- *Cisco.xslt*

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

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

- *SfB.xslt*

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

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



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



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

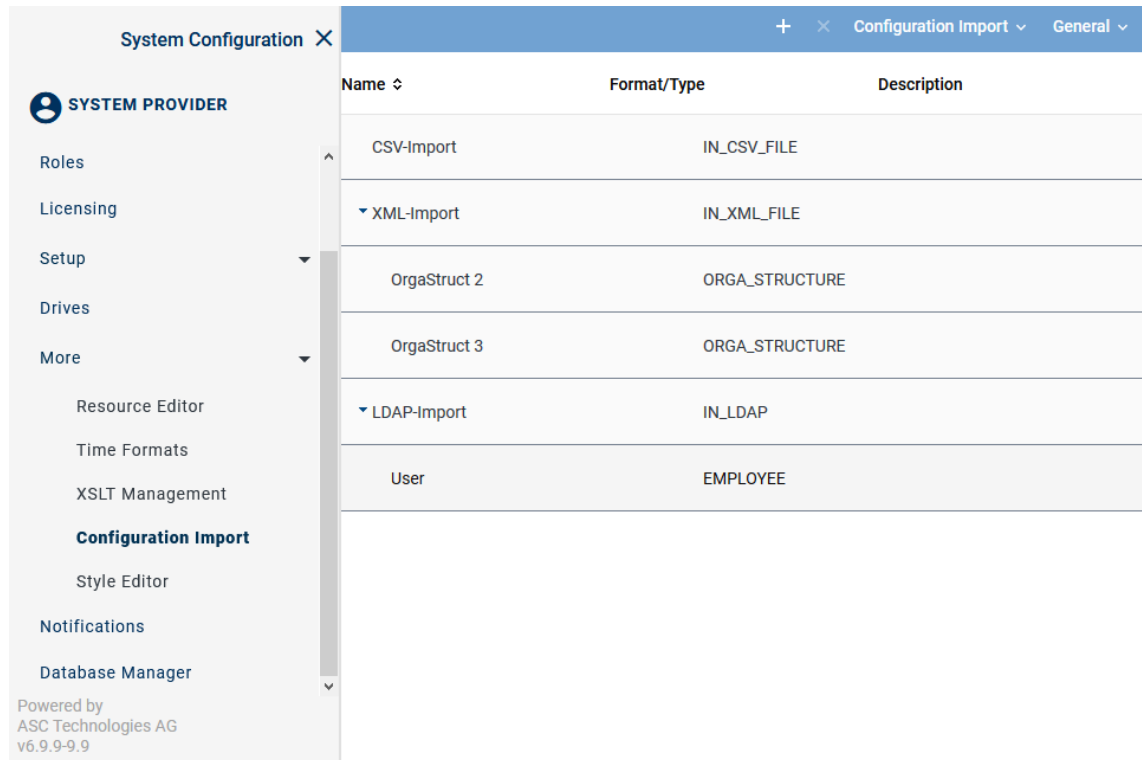


## 5

## Main view

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

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



Name	Format/Type	Description
CSV-Import	IN_CSV_FILE	
XML-Import	IN_XML_FILE	
OrgaStruct 2	ORGA_STRUCTURE	
OrgaStruct 3	ORGA_STRUCTURE	
LDAP-Import	IN_LDAP	
User	EMPLOYEE	

Fig. 1: Configuration import - main view

The following information is displayed in the main view:

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



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

## 5.1


## Toolbar Configuration Import model

The toolbar offers the following functions.



Fig. 2: Configuration import - toolbar

<b>+</b>	<b>Create</b>	<p>Create a new element. The following possibilities are available:</p> <ul style="list-style-type: none"> <li>• CSV</li> <li>• XML</li> <li>• LDAP</li> <li>• SFTP for Recording Check feature</li> </ul>
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		<ul style="list-style-type: none"> <li>• <i>External database</i> for Recording Check feature</li> </ul>
	<i>Delete</i>	Deletes the selected element upon confirming the security prompt.
<i>Configuration Import</i>		
	<i>Create New Import Configuration</i>	Creates a new import configuration for the selected import source.
	<i>Start Job</i>	Starts the selected import job.
<i>General</i>		
	<i>General Help</i>	By clicking on the menu item General Help, a description of the application you are currently viewing is opened.
	<i>Module Help</i>	By clicking on the menu item Module Help, a description of the module you are currently viewing is opened.



For detailed 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*.

## 6

## Detail view

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

The following import functions are described in this manual:

- *Recording Check Mechanism*
  - *Cisco CDR data via SFTP*  
see [chapter "Recording Check Mechanism for Cisco"](#), p. 12
  - *SfB session data from external database*  
see [chapter "Recording Check Mechanism for SfB"](#), p. 31
- *Evaluation templates*  
see [chapter "Import evaluation templates"](#), p. 48
- *Evaluations*  
see [chapter "Import evaluations"](#), p. 54
- *Call Director customer surveys*  
see [chapter "Call Director customer surveys"](#), p. 60

## 6.1

## Recording Check Mechanism




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This feature can only be used in combination with bulk recording (automatic recording).

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

[CDR](#) recording files are imported to the [neo](#) server by the [PBX](#) and checked against the saved recordings. That way, it is possible to detect whether there has been a loss of recordings and which conversations are missing.

The results can be assessed in reports.

The feature is currently available for the following integrations:

- [Cisco UCM](#), see [chapter "Recording Check Mechanism for Cisco"](#), p. 12
- [Skype for Business \(SfB\)](#), see [chapter "Recording Check Mechanism for SfB"](#), p. 31




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

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### 6.1.1 Recording Check Mechanism for Cisco

To save **CDR** files written by the **Cisco UCM**, the customer must provide an **SFTP** server. For the following configuration, you must know the user, the password, and the directory where the **CDR** files are supposed to be saved.

The **CDR** files are saved cyclically by the **Cisco UCM** during a configured interval by means of **SFTP** in a dedicated directory on an **SFTP** server.

The import job cyclically check in a configured interval whether new **CDR** files are available in the defined directory on the **SFTP** server to be imported.

By means of the **XSLT** mapping file, the data from the **CDR** text files are mapped to the respective parameters and written into the database and then matched with the saved recordings.

The results can be displayed in a report in the application **INSIGHTneo**.

For the import, you must adjust the following configurations:

- On the **Cisco UCM**, you must configure the export parameters, see [chapter "Configure Cisco UCM export parameters", p. 12](#).
- In the application System Configuration in the XSLT Management module, you must import an XSLT mapping file, see [chapter "Import XSLT mapping file", p. 16](#).
- In the application System Configuration in the Configuration Import module, you must configure a cyclic configuration import job so that the **CDR** files can be matched regularly with the recordings saved on the recording server, see [chapter "Configure configuration import job", p. 21](#).
- In the application System Monitoring in the Jobs module, you can check the execution status of the job, see [chapter "System Monitoring Check Jobs module", p. 26](#).
- In the application **INSIGHTneo**, you can issue the result as a report, see [chapter "INSIGHTneo Create report", p. 27](#).

#### 6.1.1.1 Configure Cisco UCM export parameters

For a functioning import on the recording server, you must configure the export parameters on the **Cisco UCM** for the **CDR** data.

##### 6.1.1.1.1 Configure Cisco UCM Administration

1. Log in to the **Cisco UCM** as administrator.
2. In the navigation, select the entry *Cisco Unified CM Administration* and click on the button *Go*.
3. Select the menu item *System > Service Parameter*.
4. From the drop-down list *Server*, select the respective server.
5. From the drop-down list *Service*, select the entry *Cisco CallManager*.
6. Scroll down to the section *System*.

**Cisco Unified CM Administration**  
For Cisco Unified Communications Solutions

Navigation: Cisco Unified CM Administration Go  
CCMAdministrator | Search Documentation | About | Logout

System Call Routing Media Resources Advanced Features Device Application User Management Bulk Administration Help

**Service Parameter Configuration** Related Links: Parameters for All Servers Go

Save Set to Default Advanced

**Status**  
Status: Ready

**Select Server and Service**  
Server\*: 192.168.170.2--CUCM Voice/Video (Active)  
Service\*: Cisco CallManager (Active)  
All parameters apply only to the current server except parameters that are in the cluster-wide group(s).

**Cisco CallManager (Active) Parameters on server 192.168.170.2--CUCM Voice/Video (Active)**

Parameter Name	Parameter Value	Suggested Value
<b>Call Throttling</b>		
Code Yellow Entry Latency *	20	20
Code Yellow Exit Latency Calculation *	40	40
Code Yellow Duration *	5	5
Max Events Allowed *	2000	2000
System Throttle Sample Size *	10	10
<b>Memory Throttling</b>		
Enable Memory Throttling *	True	True
There are hidden parameters in this group. Click on Advanced button to see hidden parameters.		
<b>System</b>		
CDR Enabled Flag *	True	False
CDR Log Calls with Zero Duration Flag *	True	False

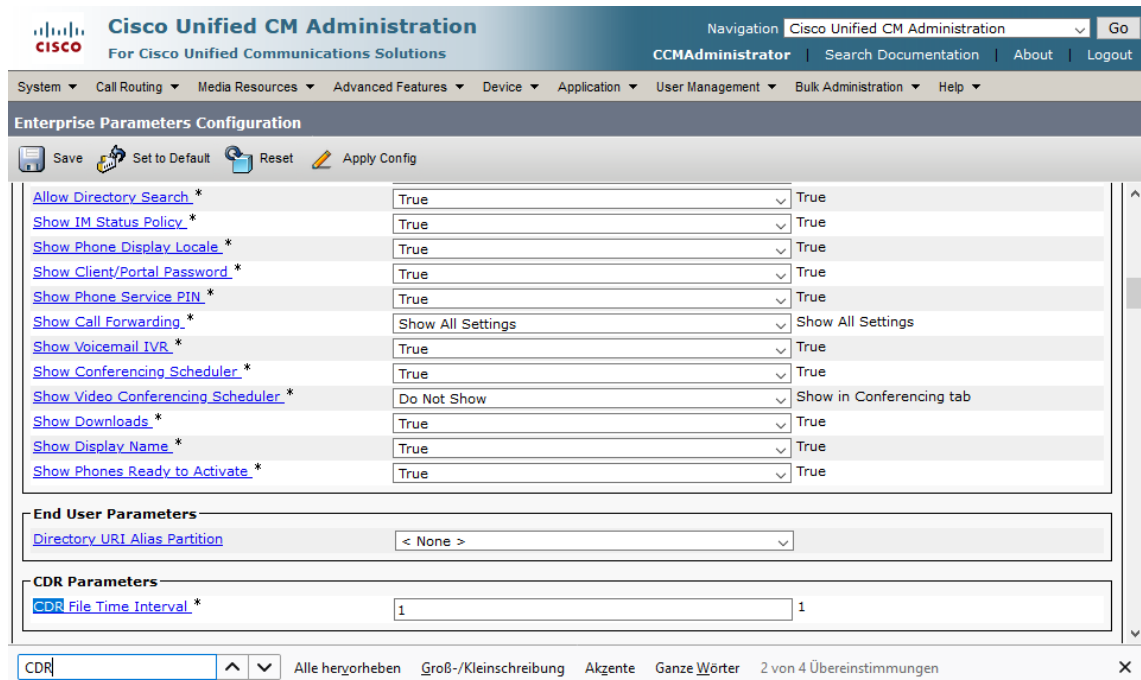
CDR Alle hervorheben Groß-/Kleinschreibung Akzente Ganze Wörter 3 von 4 Übereinstimmungen X

Fig. 3: Cisco UCM - Administration - Activate system CDR parameters

7. From the drop-down list of the following **CDR** parameters, select the value *True*.

<i>CDR Enabled Flag</i>	True
<i>CDR Log Calls with Zero Duration Flag</i>	True

8. Click on the button **Save** to save the settings.
9. Select the menu item **System > Enterprise Parameters**.
10. Scroll down to the section **CDR Parameters**.



**Cisco Unified CM Administration**  
For Cisco Unified Communications Solutions

Navigation: Cisco Unified CM Administration Go  
CCMAdministrator | Search Documentation | About | Logout

System | Call Routing | Media Resources | Advanced Features | Device | Application | User Management | Bulk Administration | Help

**Enterprise Parameters Configuration**

Save Set to Default Reset Apply Config

Allow Directory Search *	True	True
Show IM Status Policy *	True	True
Show Phone Display Locale *	True	True
Show Client/Portal Password *	True	True
Show Phone Service PIN *	True	True
Show Call Forwarding *	Show All Settings	Show All Settings
Show Voicemail IVR *	True	True
Show Conferencing Scheduler *	True	True
Show Video Conferencing Scheduler *	Do Not Show	Show in Conferencing tab
Show Downloads *	True	True
Show Display Name *	True	True
Show Phones Ready to Activate *	True	True

**End User Parameters**

Directory URI Alias Partition < None >

**CDR Parameters**

CDR File Time Interval \* 1 1

CDR Alle hervorheben Groß-/Kleinschreibung Akzente Ganze Wörter 2 von 4 Übereinstimmungen

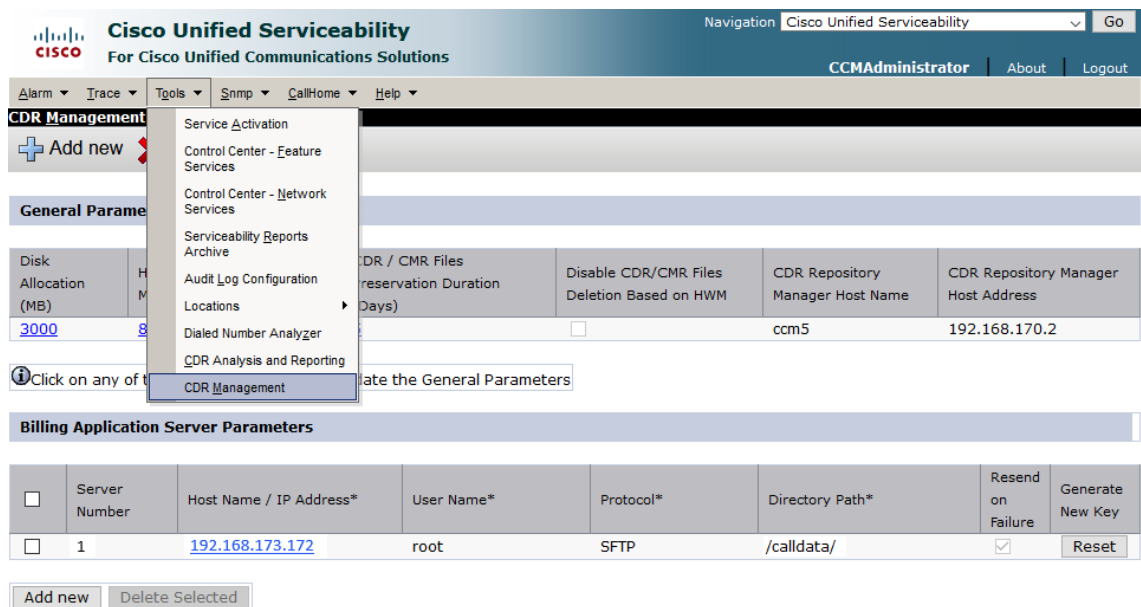
Fig. 4: Cisco UCM - Administration - Configure CDR check interval

11. If not selected yet, enter the value 1 to set the check interval for new CDR data to one minute.

⇒ The Cisco UCM then checks whether new CDR files are available which have not yet been exported.

#### 6.1.1.1.2 Configure Cisco Unified Serviceability

1. In the navigation, select the entry *Cisco Unified Serviceability* and click on the button *Go*.
2. Select the menu item *Tools > CDR Management*.
3. In the section *Billing Application Server Parameters*, click on the button *Add new* to configure the connection to the SFTP server.
4. From the drop-down list *Service*, select the entry *Cisco CallManager*.
5. Scroll down to the section *System*.



**Cisco Unified Serviceability**  
For Cisco Unified Communications Solutions

Navigation: Cisco Unified Serviceability Go  
CCMAdministrator | About | Logout

Alarm | Trace | Tools | Snmp | CallHome | Help

**CDR Management**

+ Add new

**General Parameters**

Disk Allocation (MB) 3000

CDR / CMR Files (reservation Duration Days) 1

Disable CDR/CMR Files Deletion Based on HWM ☐

CDR Repository Manager Host Name ccm5

CDR Repository Manager Host Address 192.168.170.2

Click on any of the links to update the General Parameters

**Billing Application Server Parameters**

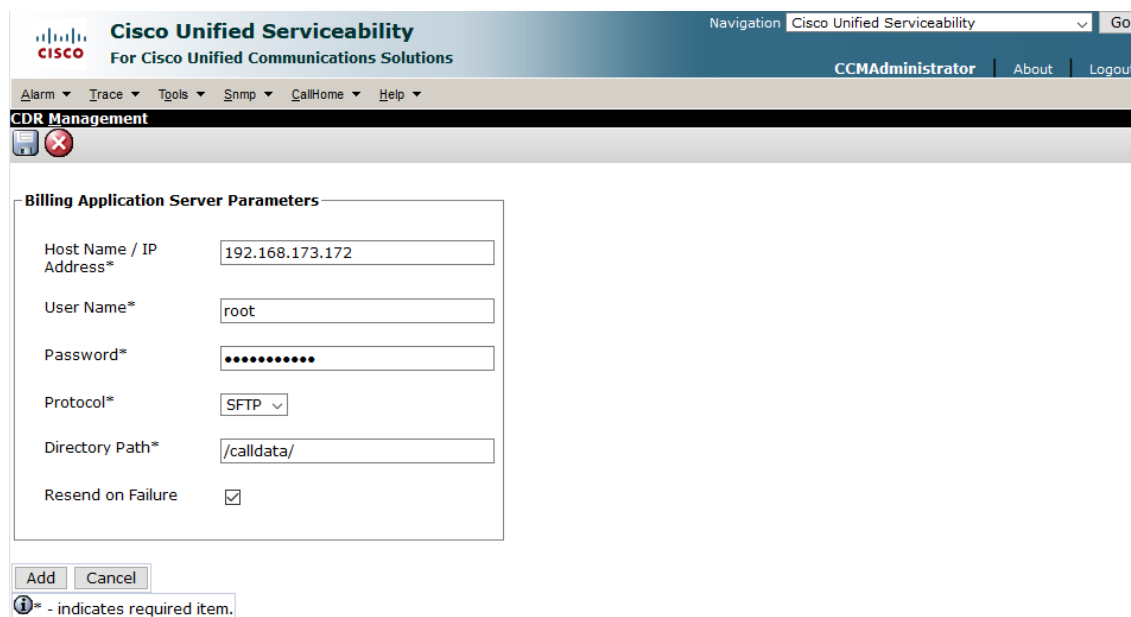
<input type="checkbox"/>	Server Number	Host Name / IP Address*	User Name*	Protocol*	Directory Path*	Resend on Failure	Generate New Key
<input type="checkbox"/>	1	192.168.173.172	root	SFTP	/calldata/	<input checked="" type="checkbox"/>	Reset

Add new Delete Selected

Fig. 5: Cisco UCM - Serviceability - Add SFTP server connection

6. In the section *Billing Application Server Parameters*, click on the button *Add new* to configure the connection to the **SFTP** server for the storage of the **CDR** files.

⇒ The following window opens:



The screenshot shows the Cisco Unified Serviceability interface. The top navigation bar includes the Cisco logo, the text "Cisco Unified Serviceability For Cisco Unified Communications Solutions", and a "Navigation" dropdown menu with "Cisco Unified Serviceability" selected and a "Go" button. Below this is a secondary navigation bar with "CCMAdministrator", "About", and "Logout". A menu bar contains "Alarm", "Trace", "Tools", "Snmp", "CallHome", and "Help". The main content area is titled "CDR Management" and contains a sub-section "Billing Application Server Parameters". This section has a form with the following fields: "Host Name / IP Address\*" (text box with "192.168.173.172"), "User Name\*" (text box with "root"), "Password\*" (password box with "\*\*\*\*\*"), "Protocol\*" (dropdown menu with "SFTP" selected), "Directory Path\*" (text box with "/calldata/"), and "Resend on Failure" (checkbox checked). Below the form are "Add" and "Cancel" buttons. A legend at the bottom left states "i\* - indicates required item."

Fig. 6: Cisco UCM - Serviceability - Configure SFTP server connection

7. Enter the parameters for the **SFTP** server connection.

<i>Host Name/IP Address</i>	Enter the IP address or the DNS name of the <b>SFTP</b> server.
<i>User Name</i>	Enter the user name which is supposed to be used for the login.
<i>Password</i>	Enter the password for the authentication on the <b>SFTP</b> server.
<i>Protocol</i>	From the drop-down list, enter the protocol <b>SFTP</b> for the transfer.
<i>Directory Path</i>	Enter the directory where the CDR data is supposed to be saved on the <b>SFTP</b> server.
<i>Resend on Failure</i>	Activate the check box for subsequent connection attempts in case the connection fails.

8. Click on the button *Add* to save the entries.

⇒ The connection information is displayed in the list of servers.

### 6.1.1.2 Import XSLT mapping file

For the import of the **CDR** files, you must import an **XSLT** mapping file to the recording server to enable the **neo** server to process the content of the **CDR** files. ASC provides a default **XSLT** file for the import of Cisco **CDR** files. You will find the file in the following path on the recording server:

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

1. Copy the **XSLT** file *Cisco.xslt* from the Windows Explorer of the recording server to any directory on your local computer. From there, you must upload the **XSLT** file in the XSLT Management module.
2. Log in to the application *System Configuration* as administrator of the system provider.
3. Select the menu item *More > XSLT Management* in the navigation bar.

⇒ The following window appears:

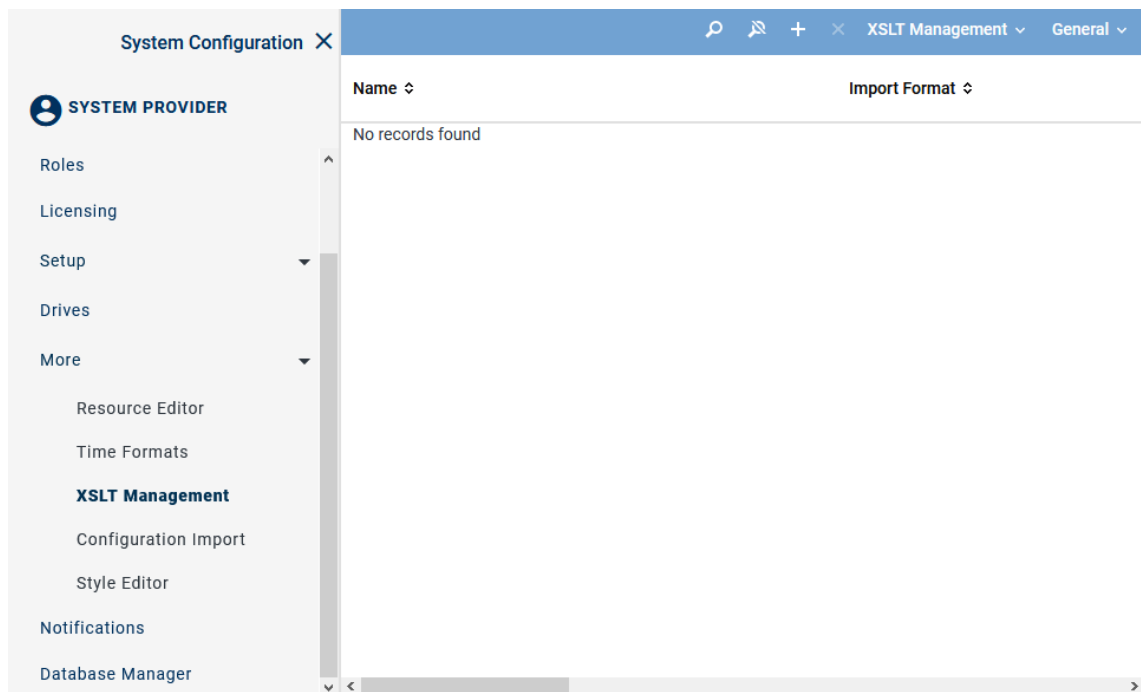


Fig. 7: Main view XSLT Management module

4. Click on the button **+** and select the menu item *Create New* to create a new **XSLT** mapping for the import of Cisco CDR data.  
⇒ The tab *Details* appears in the detail view.



6.1.1.2.1    **Tab Details**

In this tab, you can configure the detail parameters for the **XSLT** mapping.

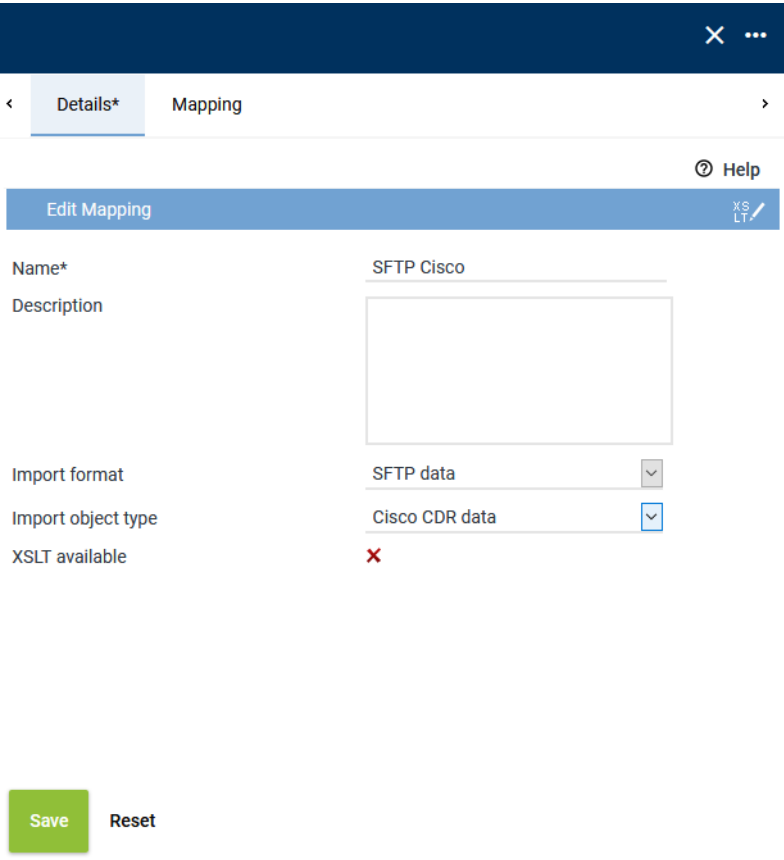



Fig. 8: Create **XSLT** mapping file - tab Details

1. Enter the following parameters:

<i>Name</i>	Enter a name for the <b>XSLT</b> mapping.
<i>Description</i>	Enter an optional description.
<i>Import format</i>	Select the import format from the drop-down list, for Cisco <i>SFTP data</i> .
<i>Import object type</i>	From the drop-down list, select the import object type <i>Cisco CDR data</i> .

Tab. 1: XSLT Management - tab Details - parameters

2. In the menu bar *Edit Mapping*, click on the icon  (*XSLT Editor*).  
⇒ The **XSLT** Editor opens.

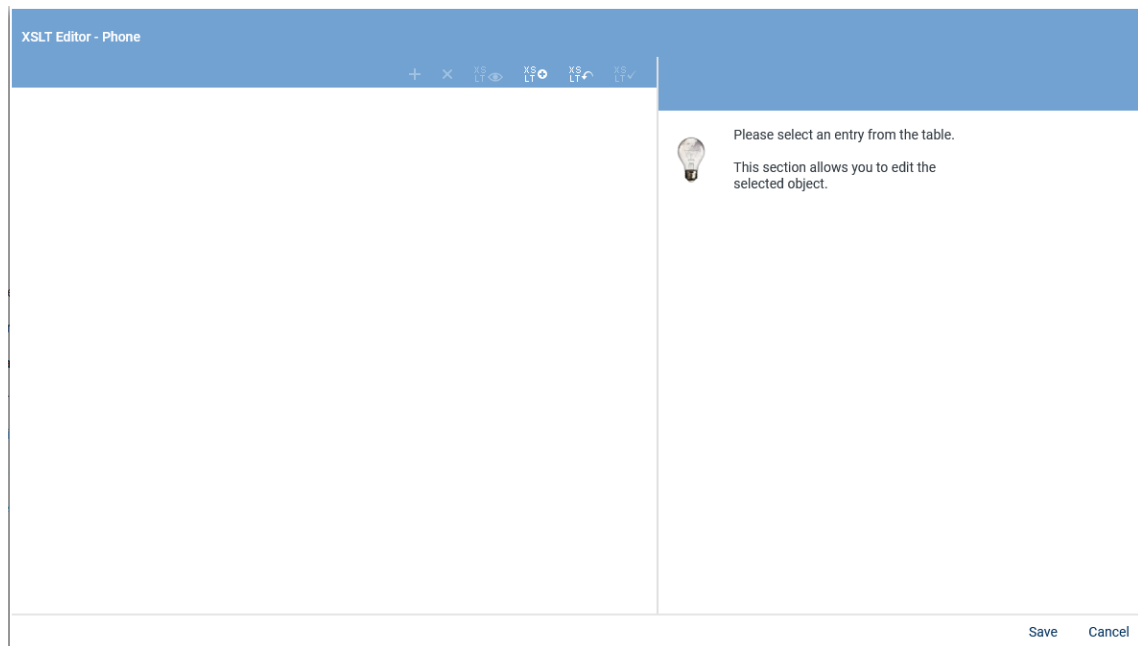



Fig. 9: **XSLT** Editor

3. Click on the icon  (*Import XSLT file*) in the menu bar.
4. Click on the button *Select File*.
5. In the Explorer dialog, navigate to the directory where you have saved the **XSLT** files.

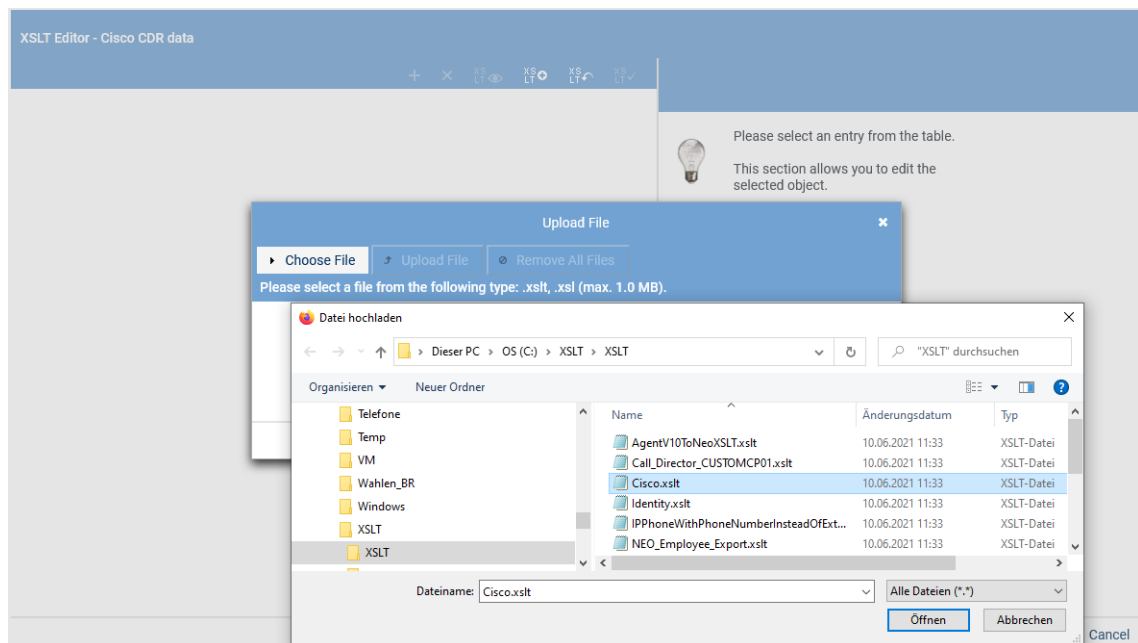


Fig. 10: Select **XSLT** file

6. Select the respective **XSLT** file.
7. Click on the button *Open*.

⇒ The file appears in the dialog *Upload File*.

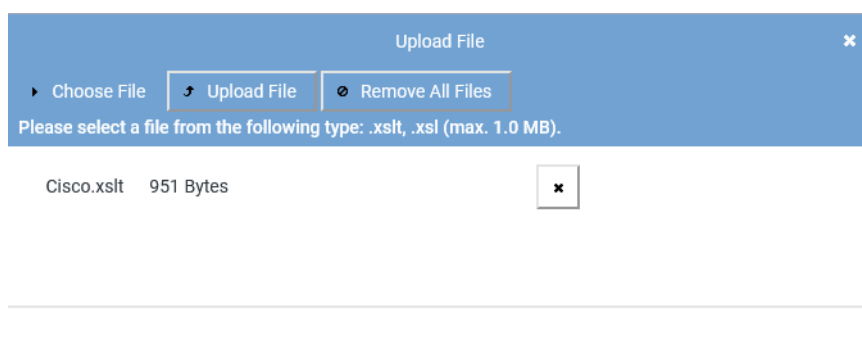


Fig. 11: Upload **XSLT** file

8. Click on the button *Upload File*.

⇒ The mapping file appears in the **XSLT** Editor.

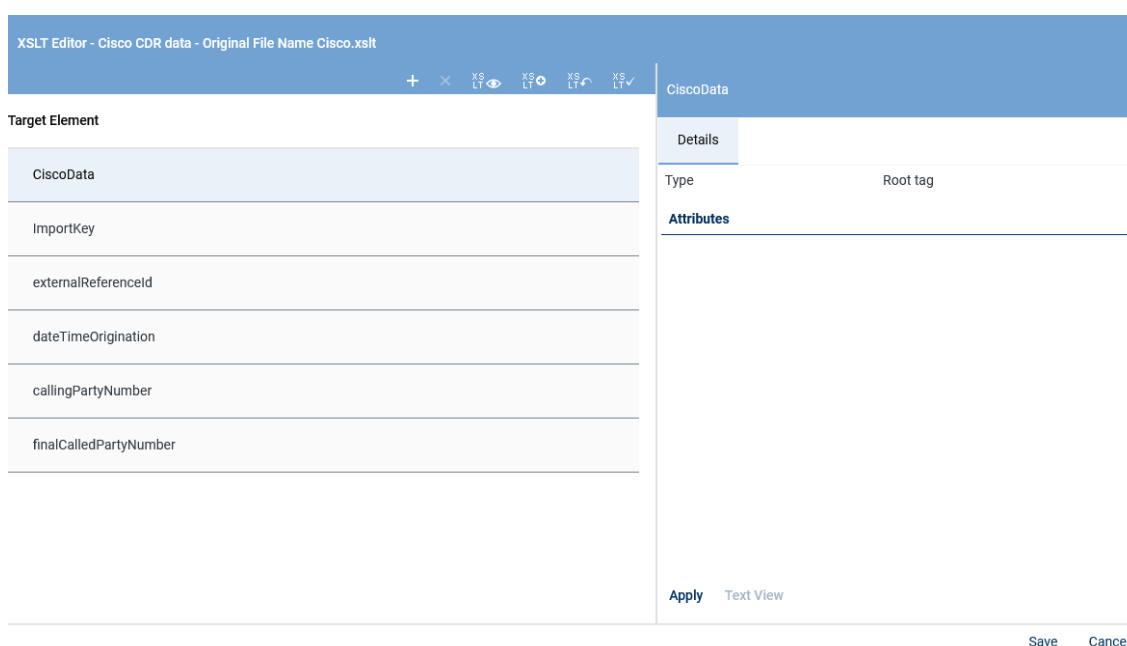
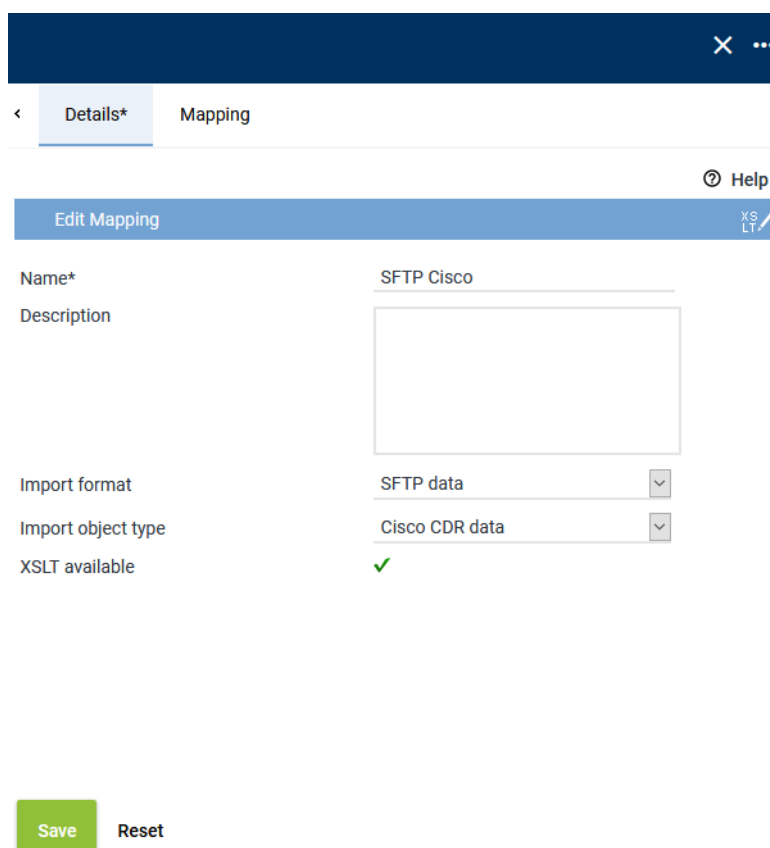


Fig. 12: Apply **XSLT** mapping file

9. Click on the button *Apply* to apply the mapping file.

⇒ The **XSLT** is available for mapping.



Details\* Mapping

Help

Edit Mapping

Name\* SFTP Cisco

Description

Import format SFTP data

Import object type Cisco CDR data

XSLT available ✓

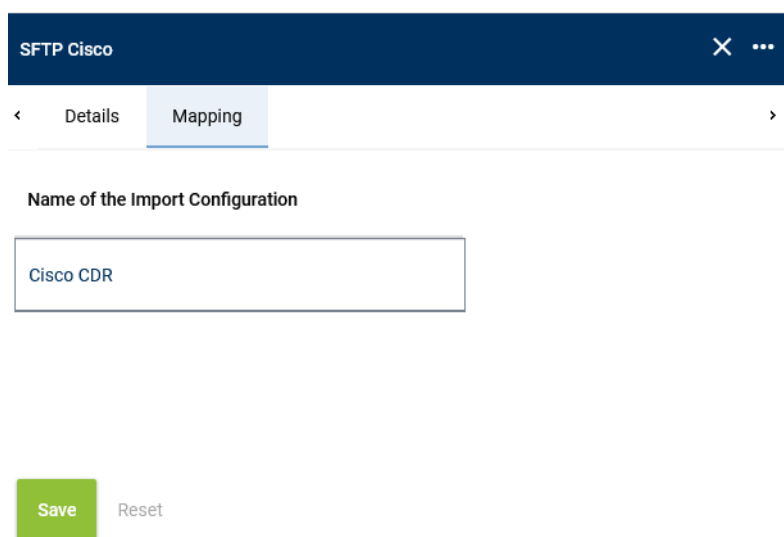
Save Reset

Fig. 13: XSLT mapping file available.

10. Click on the button **Save** to save the configuration.

#### 6.1.1.2.2 Tab Mapping

This tab displays which configuration import job the XSLT file has been mapped to.



SFTP Cisco

Details Mapping

Name of the Import Configuration

Cisco CDR

Save Reset

Fig. 14: XSLT Management - tab Mapping

**NOTICE!** The import configuration does not appear until the mapping has been configured and saved in the Configuration Import module.

### 6.1.1.3 Configure configuration import job

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

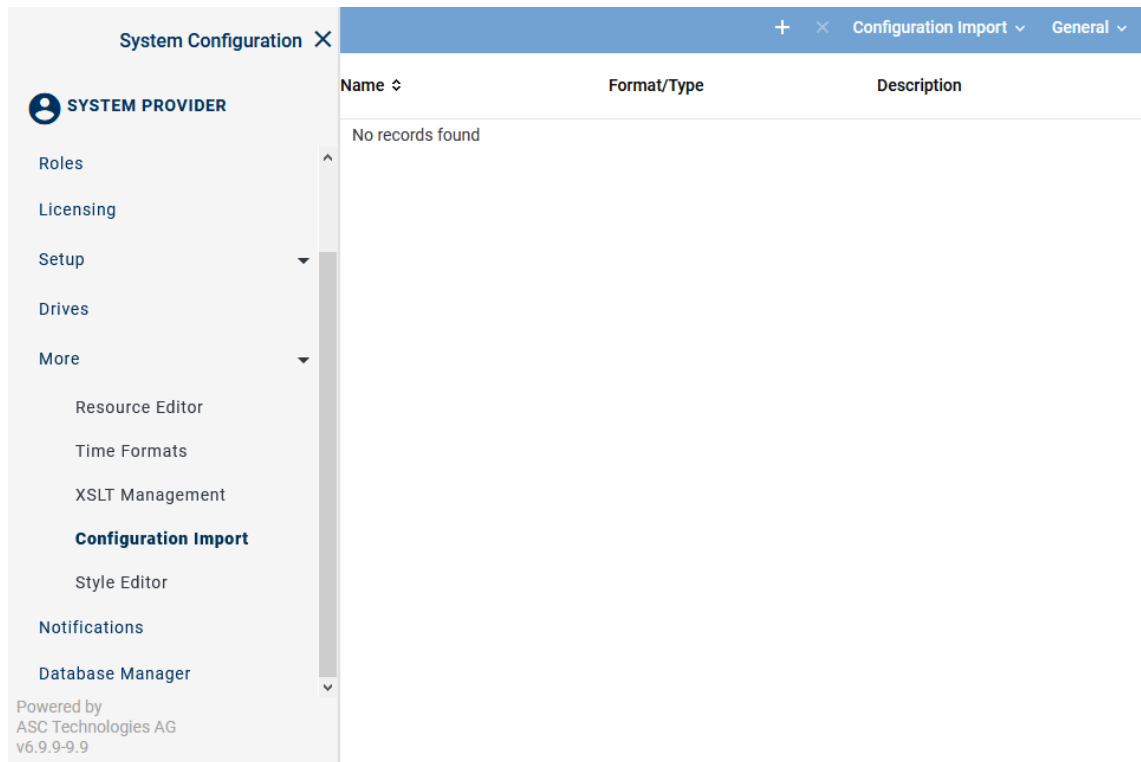



Fig. 15: Configuration Import module - main view

#### 6.1.1.3.1 Create import source

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



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

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

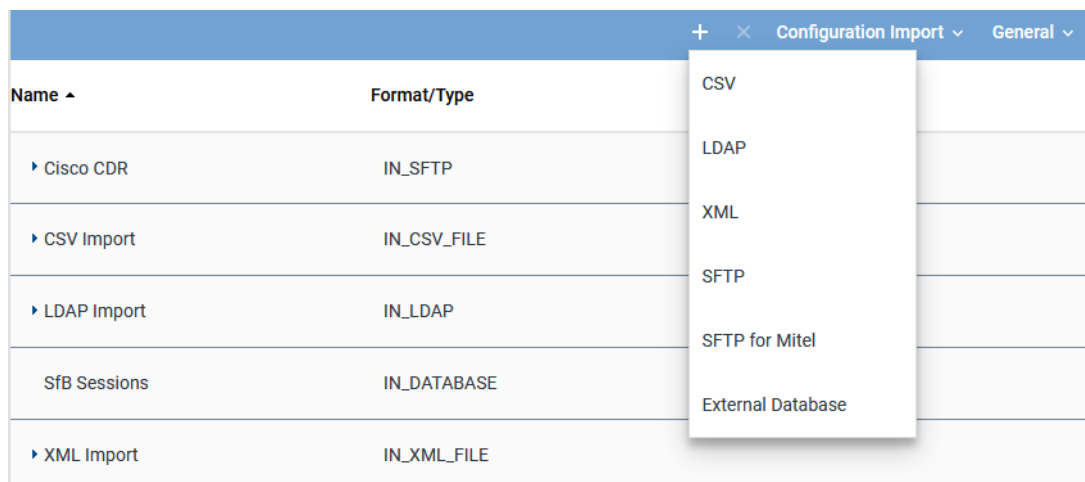



Fig. 16: Create import source

### Create import source for SFTP import

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

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

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

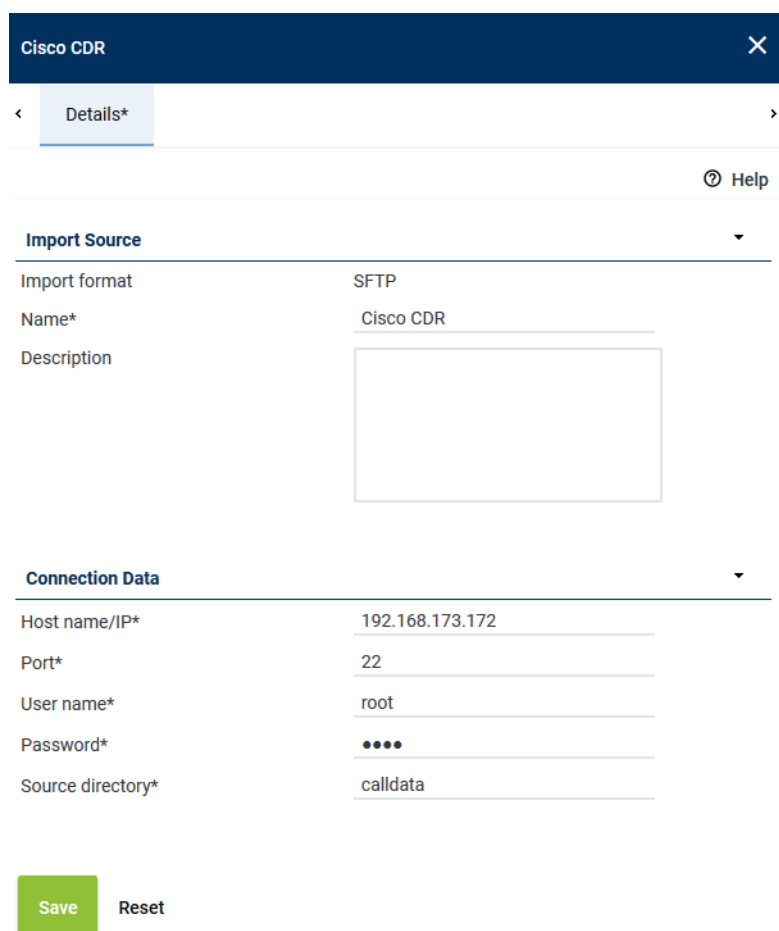


Fig. 17: Detail view Configure import source for SFTP import

3. Enter the following parameters:

#### Group field Import Source

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

#### Group field Connection Data

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

<i>Password</i>	Enter the password with which the user is supposed to authenticate to access the database.
<i>Source directory</i>	Enter the directory from which the data is supposed to be imported.

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

### Create import job for the SFTP import

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

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

### Tab Details

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

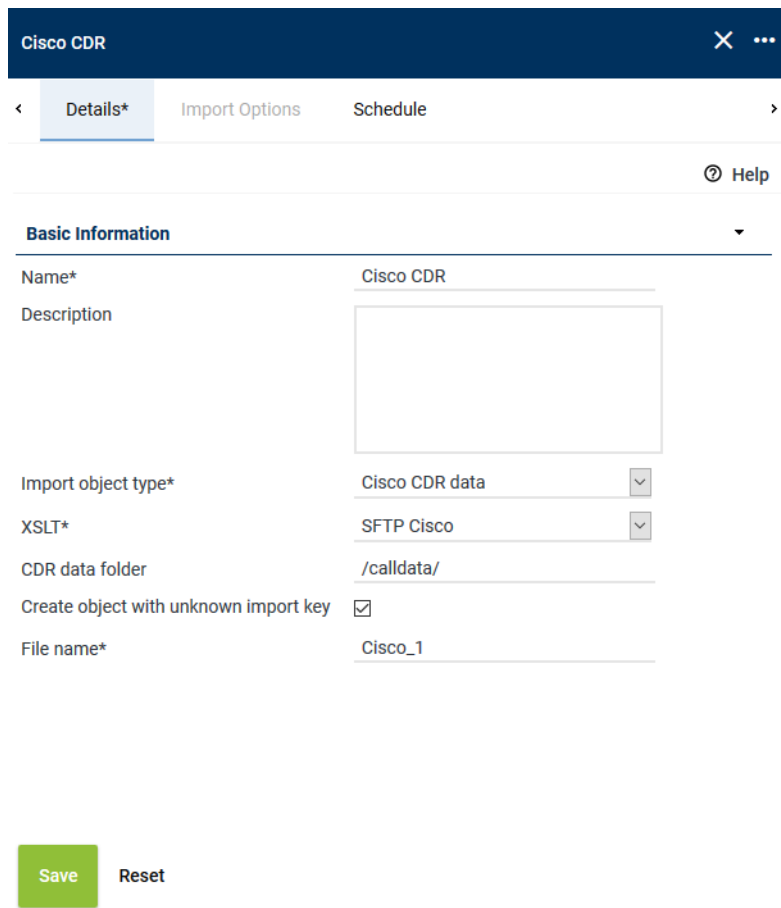


Fig. 18: Import configuration - tab Details for SFTP import

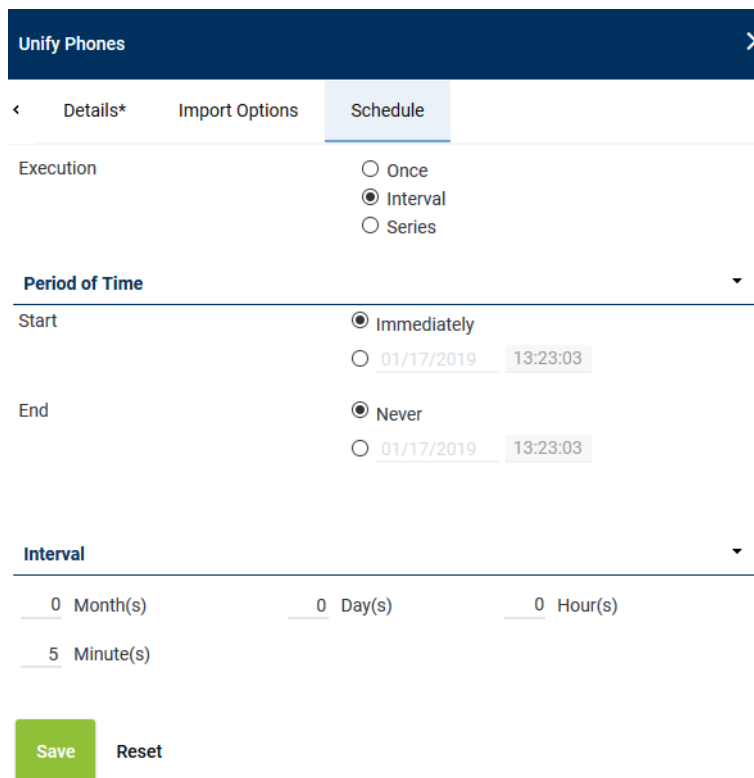
1. Enter the following parameters:

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

<b>XSLT</b>	From the drop-down list, select the <b>XSLT</b> mapping file that you have created previously in the XSLT Management module.
<b>CDR data folder</b>	Enter the directory where the <b>CDR</b> files have been saved.
<b>Create object with unknown import key</b>	Select whether new sets of data can be imported and created or whether only existing sets of data are supposed to be updated. <input checked="" type="checkbox"/> = New sets of data can be created. <input type="checkbox"/> = No new sets of data.
<b>File name</b>	Enter the file name of the <b>CDR</b> file.

### Tab Schedule

In this tab, you can configure the schedule.



**Unify Phones** [X]

< Details\* Import Options **Schedule**

**Execution**

☐ Once  
☒ Interval  
☐ Series

**Period of Time** ▼

**Start**

☒ Immediately  
☐ 01/17/2019 13:23:03

**End**

☒ Never  
☐ 01/17/2019 13:23:03

**Interval** ▼

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

**Save** **Reset**

Fig. 19: Tab Schedule

Select how often the job is supposed to be executed.

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





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

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

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



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

### Group field Period of Time

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

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

Fig. 20: Schedule - Period of Time

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

### Group field Interval



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

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

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

Fig. 21: Schedule - Interval

1. Enter the values directly into the entry fields via the keyboard.

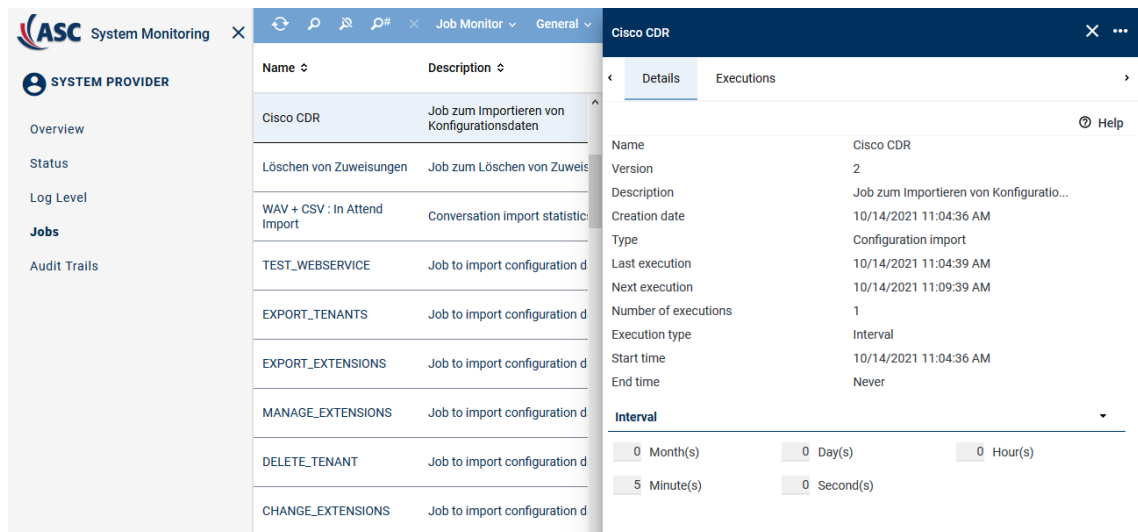
### Save import job

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

#### 6.1.1.4 System Monitoring Check Jobs module

Once the configuration job has been started, a monitoring notification about the execution status appears in the application *System Monitoring*.

1. Log in to the application *System Monitoring* as administrator of the system provider.
2. Select the menu item *Jobs* in the navigation bar.
3. In the column *Name*, search for the name of the configuration job.  
⇒ The detail view displays the details of the job.



The screenshot shows the 'System Monitoring' application with the 'Jobs' module selected. A table lists various jobs, with 'Cisco CDR' highlighted. The right-hand pane shows the 'Details' for this job.

Name	Description
Cisco CDR	Job zum Importieren von Konfigurationsdaten
Löschen von Zuweisungen	Job zum Löschen von Zuweisungen
WAV + CSV : In Attend Import	Conversation import statistics
TEST_WEBSERVICE	Job to import configuration data
EXPORT_TENANTS	Job to import configuration data
EXPORT_EXTENSIONS	Job to import configuration data
MANAGE_EXTENSIONS	Job to import configuration data
DELETE_TENANT	Job to import configuration data
CHANGE_EXTENSIONS	Job to import configuration data

Details	
Name	Cisco CDR
Version	2
Description	Job zum Importieren von Konfiguration...
Creation date	10/14/2021 11:04:36 AM
Type	Configuration import
Last execution	10/14/2021 11:04:39 AM
Next execution	10/14/2021 11:09:39 AM
Number of executions	1
Execution type	Interval
Start time	10/14/2021 11:04:36 AM
End time	Never

**Interval**

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

Fig. 22: System Monitoring - Jobs module - details of the configuration job

<i>Name</i>	Displays the name of the configuration job.
<i>Version</i>	Displays the version of the configuration job.
<i>Description</i>	Displays a description of the configuration job.
<i>Creation date</i>	Displays the creation date of the configuration job.
<i>Type</i>	Displays the type of the job
<i>Last execution</i>	Displays the date of the last execution.
<i>Next execution</i>	Displays the date of the next execution.
<i>Number of executions</i>	Displays the number of executions so far.
<i>Execution type</i>	Displays the execution type of this job, whether the job is supposed to be executed once or repeatedly.
<i>Start time</i>	Displays when the job is supposed to start running.
<i>End time</i>	Displays until when the job is supposed to be running.

Tab. 2: Details of the configuration job

### Group field Interval

When a cyclic job has been configured, then this group field displays the configured repetitions of the interval.

<i>Interval</i>	Displays the interval in which the execution is repeated.
	• <i>Month</i>

- *Day(s)*
- *Hour(s)*
- *Minute(s)*
- *Second(s)*

Tab. 3: Details of the configuration job

#### 6.1.1.5 INSIGHTneo Create report

To assess the results, you can create a report in the application INSIGHTneo.

1. Log in to the application INSIGHTneo as system administrator.

##### 6.1.1.5.1 Report templates

In the Report Templates module, ASC provides a large number of default report templates to create reports on different topics.

1. Select the menu item *Report Templates* in the navigation bar.

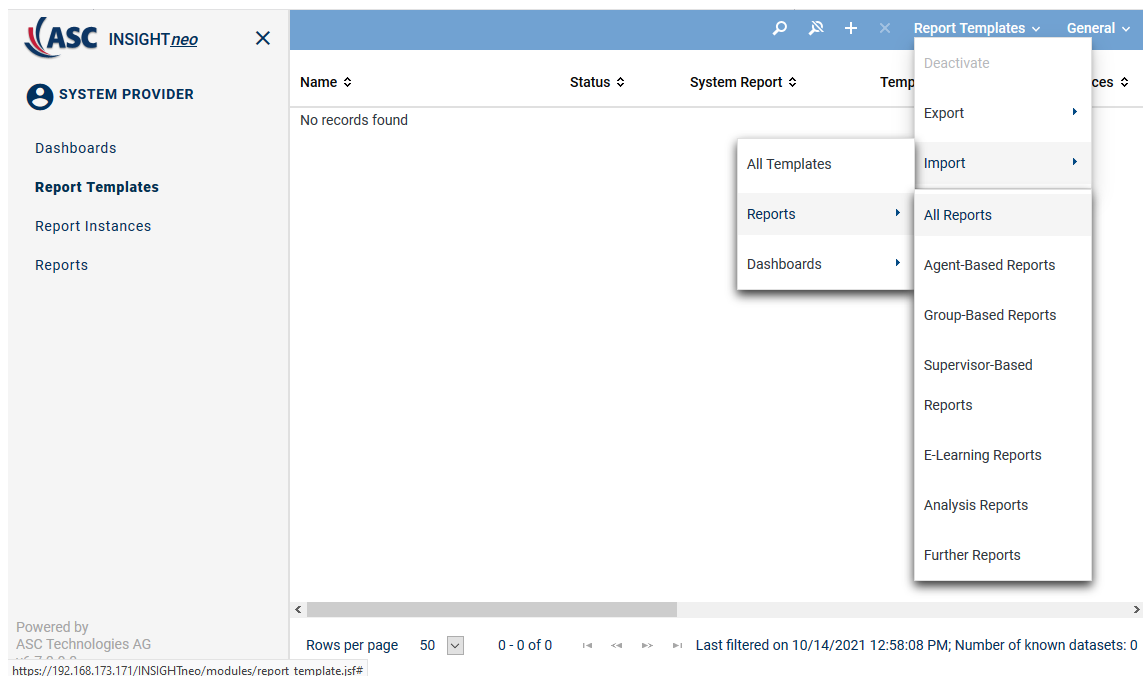


Fig. 23: INSIGHTneo - Report Templates module

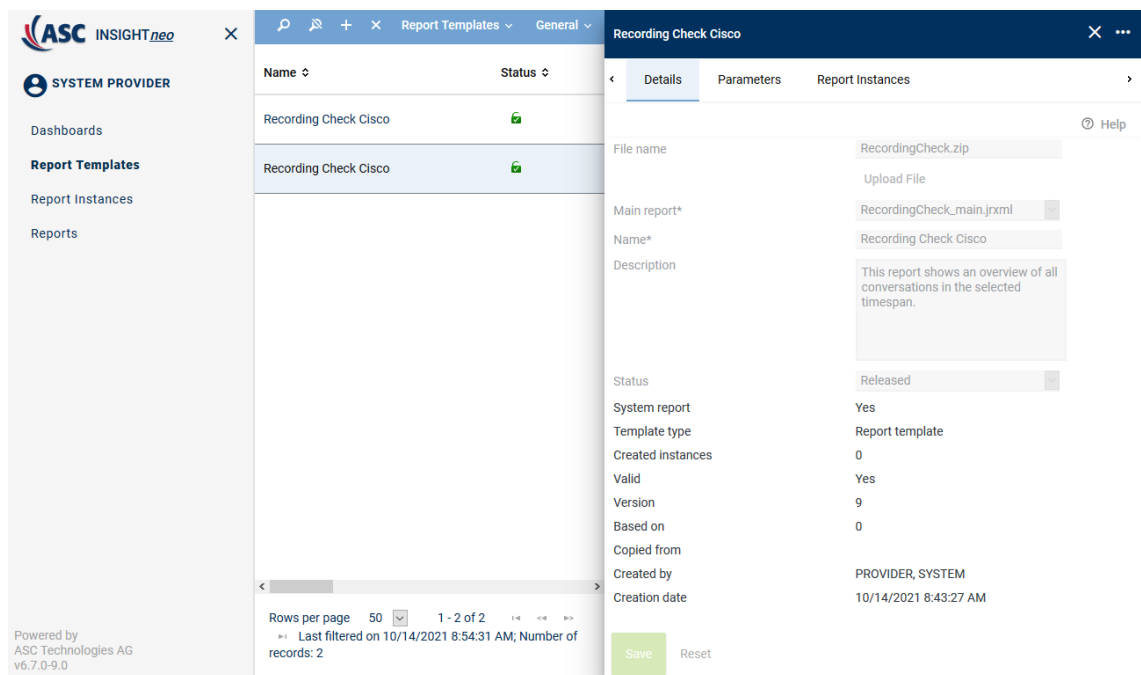
2. Select the menu item *Report Templates > Import > Reports > All Reports* in the toolbar.  
⇒ A window to select default report templates opens.

System Report Template Selection			
Name	Count	Language	
Prüfung der Extension-Zuweisung	3	German	
Recording Check Cisco	9	English	
Recording Check Cisco	10	German	
Recording Check Mittel	1	English	
Recording Check Mittel	1	German	
Recording-Check SfB	5	English	
Recording-Check SfB	5	German	
Sprachaufzeichnungen (System)	8	German	
Störungen im Voice-Recording	6	German	
System disturbances	7	English	

Import Cancel

Fig. 24: Select report template for Cisco

3. Select the report template *Recording Check Cisco*.
  4. Click on the button *Import*.
- ⇒ The report template appears in the main view.



The screenshot shows the INSIGHTneo interface with the 'Report Templates' module selected. The 'Recording Check Cisco' template is highlighted in the list. The details panel on the right shows the following information:

Field	Value
File name	RecordingCheck.zip
Upload File	
Main report*	RecordingCheck_main.jrxml
Name*	Recording Check Cisco
Description	This report shows an overview of all conversations in the selected timespan.
Status	Released
System report	Yes
Template type	Report template
Created instances	0
Valid	Yes
Version	9
Based on	0
Copied from	
Created by	PROVIDER, SYSTEM
Creation date	10/14/2021 8:43:27 AM

At the bottom of the interface, there is a footer indicating the software is powered by ASC Technologies AG v6.7.0-9.0.

Fig. 25: INSIGHTneo - Report for Recording Check Mechanism


5. Select the report template in the main view to display its details.  
**NOTICE!** It is not possible to edit default report templates.  
 The report's parameters are edited in the report instance in the Report Instances module.



For information about using the Report Templates module and the Report Instances module refer to the respective INSIGHT<sub>neo</sub> user manuals.

#### 6.1.1.5.2 Report instances

A report instance is the detailed configuration of a report template which defines which data is supposed to be displayed in the report. A report is created based on the report instance and the configured parameters at the defined moment in time.

1. In the navigation bar, select the menu item *Report Instances* to configure the parameters of the report instance.
2. Click on the icon  in the toolbar of the main view.
3. Select the menu item *Reports > All Reports*.
  - ⇒ A windows with the available default report templates opens.
4. Select the report template *Recording Check Cisco*.
  - ⇒ The information about the report template are displayed.
5. Click on the button *OK*.
  - ⇒ The detail view displays the parameters of the report template that can be configured. Here, you can define the parameters which are supposed to be used to create the reports and to display the results.

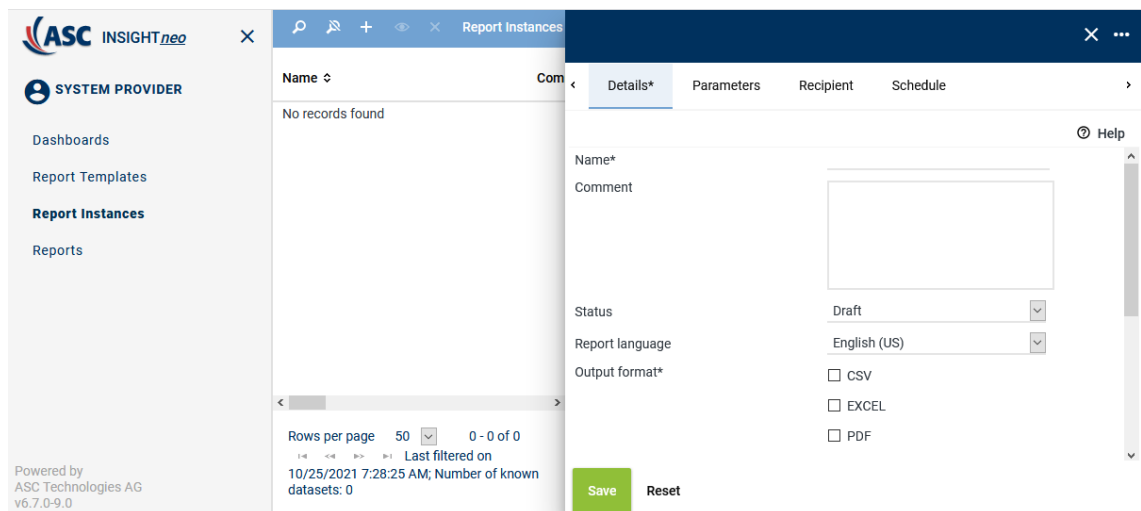


Fig. 26: Main view - report instances

#### Tab Details

1. In the tab *Details*, select the output format in which the report is supposed to be issued. The following output formats are available:

- CSV
- EXCEL
- PDF

#### Tab Parameters

1. In the tab *Parameters*, select the period of time that the report is supposed to cover.

#### Tab Recipient

1. In the tab *Recipient*, select the user who is supposed to be sent the report.

### Tab Schedule


- In the tab *Schedule*, select the execution parameters.  
We recommend the report to be issued periodically as a series.



For information about using the Report Templates module and the Report Instances module refer to the respective INSIGHT<sup>neo</sup> user manuals.

#### 6.1.1.5.3 Reports

The created reports are displayed in the Reports module.

- Select the respective report.
- By clicking on the icon  (*Display*), you can view the report and download to save it, if required.

#### RecCheck - Cisco

Report template: Recording Check Cisco  
created: 10/20/21 11:44:08 AM

This Report shows an overview of all not recorded CISCO-conversations the selected timespan.

This report shows all not recorded CISCO-conversations between 2021-01-01 12:00:00.0 and 2021-12-31 11:59:59.997.

Count recorded calls

0

Count relevant calls

20

Captured in system

0.00 %

Ext. Ref.	Starttime	Caller	Called
0e9a9c91119a121e1f990fa23706791b	10/20/21 12:54 PM	4100	4015
1c55e70639c94ea44ab9bffc2299221	10/20/21 12:54 PM	4100	4015
2664a7ce3352ed52c87406575bb1c819	10/20/21 12:54 PM	4100	4015
278fcdad8a25b1d7c939c103f38288	10/20/21 12:54 PM	4100	4015
3ea4e46e6d56fcd0ca95fb6682642c2b	10/20/21 12:54 PM	4100	4015
4372cef1d56afdb3a5bd34ef91dfde1d	10/20/21 12:54 PM	4100	4015
52d058acb70ed03affe20a3f44f57662	10/20/21 12:54 PM	4100	4015
71800f5477c87a3361df4b7b99262e42	10/20/21 12:54 PM	4100	4015
8828539e8aaa5f48da54a9251b3cc123	10/20/21 12:54 PM	4100	4015
882ebac91e9c8603bd0d44acd11862c2b	10/20/21 12:54 PM	4100	4015
aab408f5479ae3f7c262ba57cb1076a8	10/20/21 12:54 PM	4100	4015
c76fb791f0bcd53fd2b6f15331c8f16d	10/20/21 12:54 PM	4100	4015
cb85ced2dd0d53aefdfa186d20f6821d	10/20/21 12:54 PM	4100	4015
cd0c22abc1d8b84c4e8b2f557a2615a	10/20/21 12:54 PM	4100	4015
cf389713e40a0b95313e6fc0a7a8b8a	10/20/21 12:54 PM	4100	4015
d1c48311c9e6e53e19248a59bdb43a22	10/20/21 12:54 PM	4100	4015
d6b6163b405acc9c9567654ab3a42b84	10/20/21 12:54 PM	4100	4015
f476f1b5e94afa36a5191b262772fac6	10/20/21 12:54 PM	4100	4015
f6902ea9fd1bb6a310f888c756c8023	10/20/21 12:54 PM	4100	4015

Fig. 27: Report - Recording Check Mechanism for Cisco

In the example, all conducted calls have not been recorded.

The list displays calls which have actually been conducted but for which there are no recordings in the recording system.

The recipient receives the report as an attachment in an e-mail.

### 6.1.2 Recording Check Mechanism for SfB

To ensure that in [SfB](#) session data is created, the [SfB](#) monitor option must have been configured.

The [SfB](#) session data is saved in an external database for [SfB](#).

From this external database, the [SfB](#) session data is imported to the [neo](#) server. The [SfB](#) session data is then written into a table in the database and can be matched with the saved recordings.

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

For the import, you must adjust the following configurations:

- In the application System Configuration in the XSLT Management module, you must import an XSLT mapping file, see [chapter "Import XSLT mapping file", p. 31](#).
- In the application System Configuration in the Configuration Import module, you must configure a cyclic configuration import job so that the database entries can be matched regularly with the recordings saved on the recording server, see [chapter "Configure configuration import job", p. 36](#).
- In the application System Monitoring in the Jobs module, you can check the execution status of the job, see [chapter "System Monitoring Check Jobs module", p. 42](#).
- In the application INSIGHT[neo](#), you can issue the result as a report, see [chapter "INSIGHTneo Create report", p. 43](#).

#### 6.1.2.1 Import XSLT mapping file

To import *SfB session data*, you must import an [XSLT](#) mapping file to the recording server to enable the [neo](#) server to process the *SfB session files*. ASC provides a default [XSLT](#) file for the import of *SfB session data*. You will find the file in the following path on the recording server:

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

1. Copy the [XSLT](#) file *SfB.xsl* from the Windows Explorer of the recording server to any directory on your local computer. From there, you must upload the [XSLT](#) file in the XSLT Management module.
2. Log in to the application *System Configuration* as administrator of the system provider.
3. Select the menu item *More > XSLT Management* in the navigation bar.  
⇒ The following window appears:

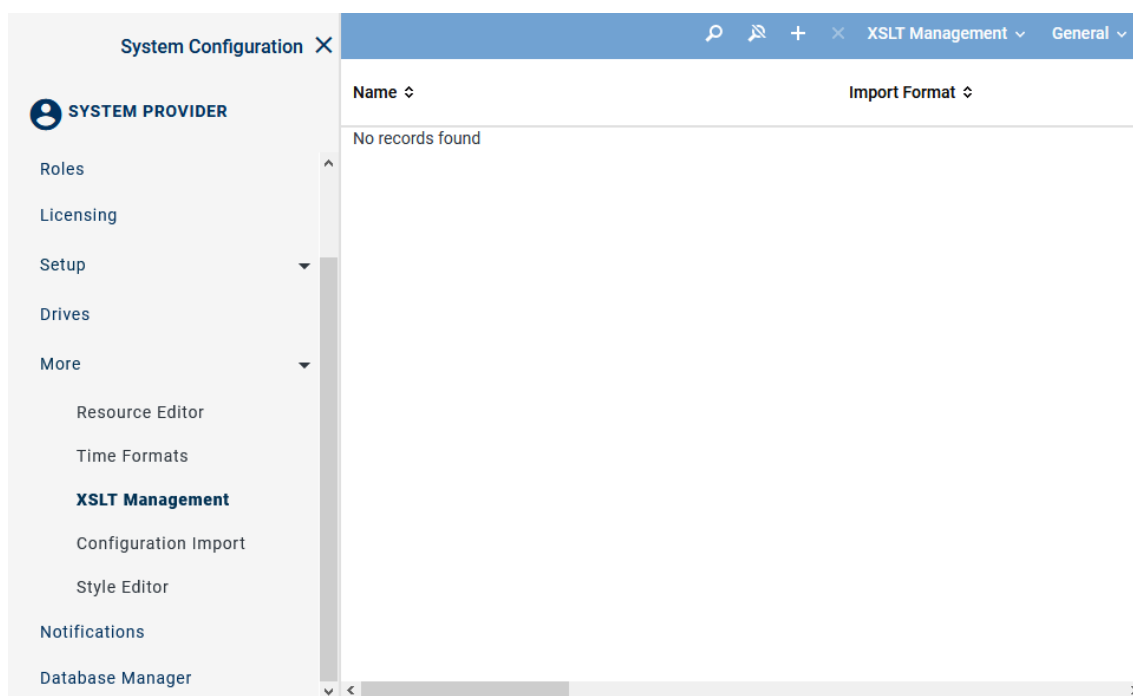



Fig. 28: Main view XSLT Management module

4. Click on the button  and select the menu item *Create New* to create a new **XSLT** mapping for the import.
  - ⇒ The tab *Details* appears in the detail view.

#### 6.1.2.1.1 Tab Details

In this tab, you can configure the detail parameters for the **XSLT** mapping.

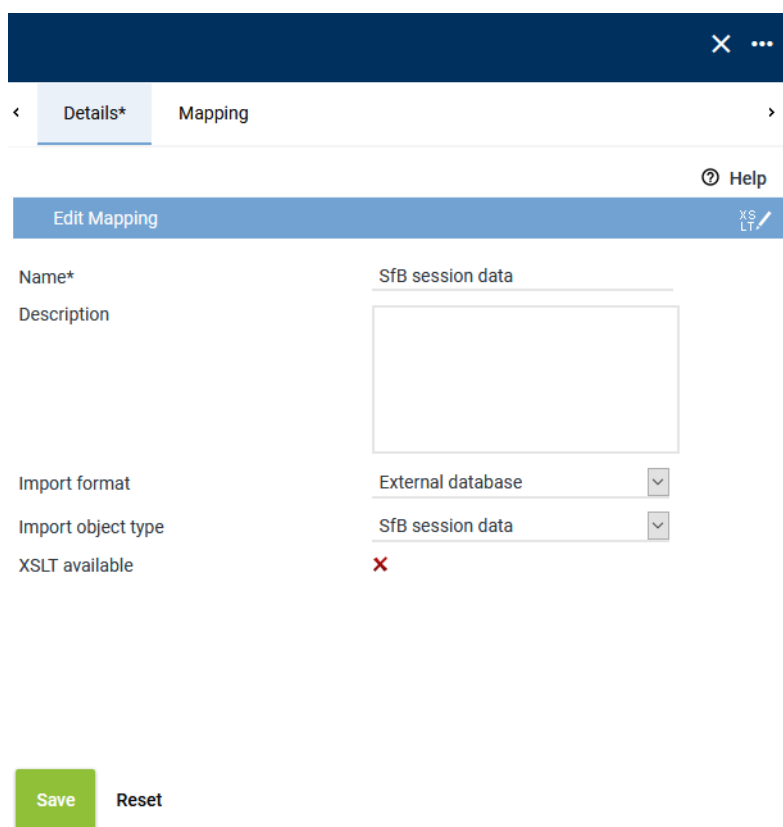



Fig. 29: Create **XSLT** mapping file - tab Details



1. Enter the following parameters:

<i>Name</i>	Enter a name for the <b>XSLT</b> mapping.
<i>Description</i>	Enter an optional description.
<i>Import format</i>	From the drop-down list, select the import format, for <b>SfB External database</b> .
<i>Import object type</i>	From the drop-down list, select the import object type <b>SfB session data</b> .

Tab. 4: XSLT Management - tab Details - parameters

2. In the menu bar *Edit Mapping*, click on the icon  (**XSLT Editor**).  
⇒ The **XSLT** Editor opens.

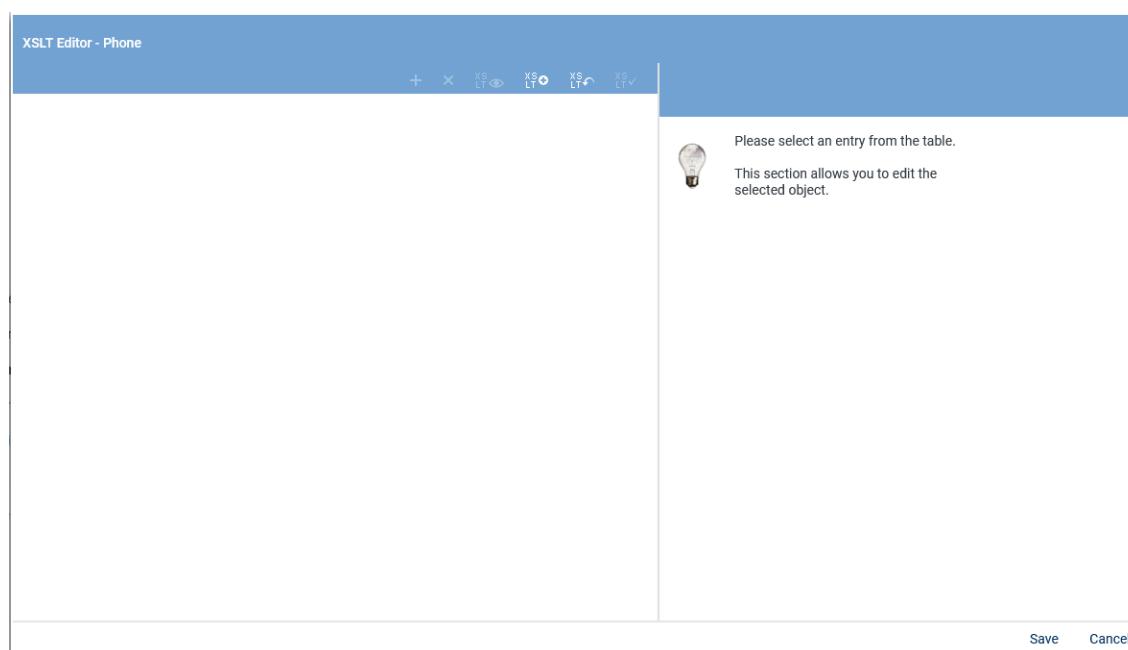


Fig. 30: **XSLT** Editor

3. Click on the icon  (**Import XSLT file**) in the menu bar.
4. Click on the button *Select File*.

5. In the Explorer dialog, navigate to the directory where you have saved the **XSLT** files.

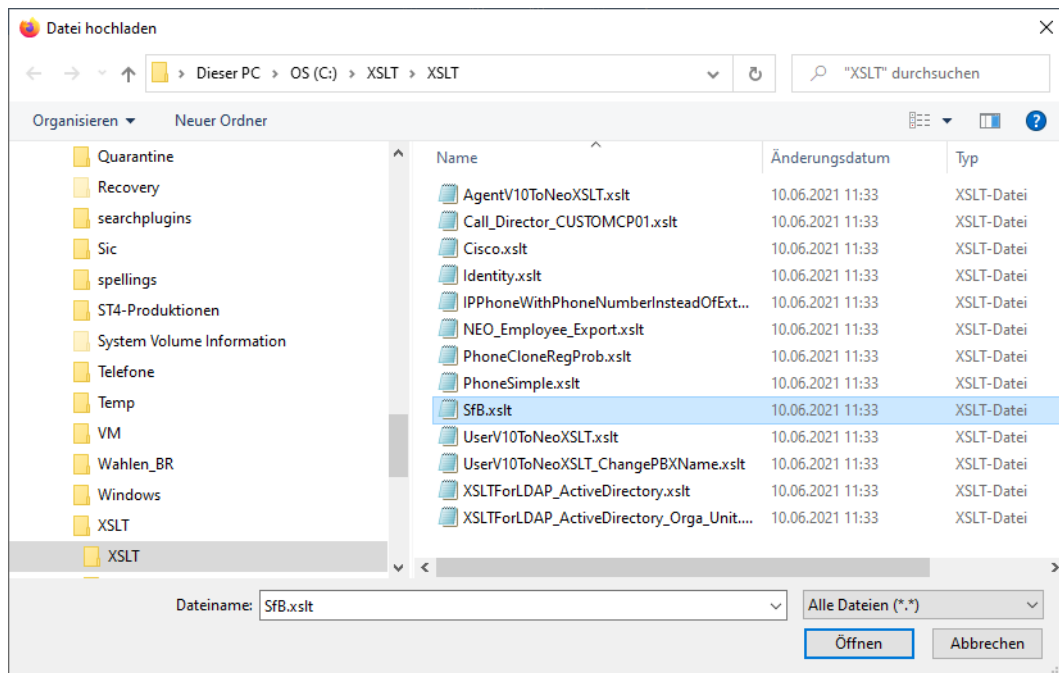


Fig. 31: Select **XSLT** file

6. Select the respective **XSLT** file.
7. Click on the button *Open*.
- ⇒ The file appears in the dialog *Upload File*.

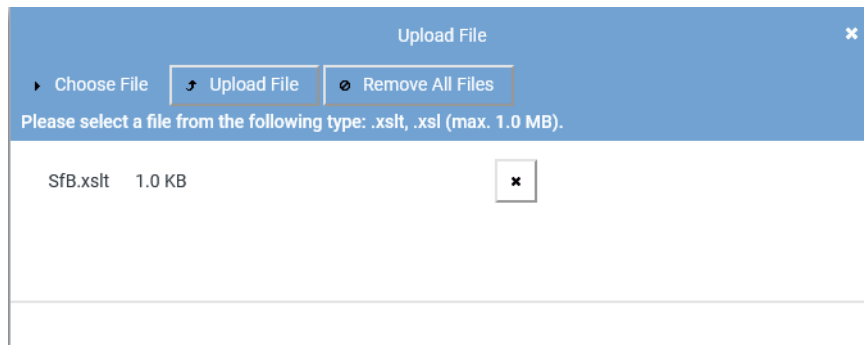


Fig. 32: Upload **XSLT** file

8. Click on the button *Upload File*.
- ⇒ The mapping file appears in the **XSLT** Editor.

XSLT Editor - Sfb session data - Original File Name Sfb.xslt

Target Element

SfbSessionData
ImportKey
hash
sessionTime
startTime
responseTime
stopTime
user1

SfbSessionData

Details

Type Root tag

Attributes

Apply Text View

Save Cancel

Fig. 33: Apply XSLT mapping file

- Click on the button *Apply* to apply the mapping file.  
⇒ The XSLT is available for mapping.

×

Details\* Mapping

Help

Edit Mapping

Name\* Sfb session data

Description

Import format External database

Import object type Sfb session data

XSLT available ✓

Save Reset

Fig. 34: XSLT mapping file available.

- Click on the button *Save* to save the configuration.

### 6.1.2.1.2 Tab Mapping

This tab displays which configuration import job the [XSLT](#) file has been mapped to.

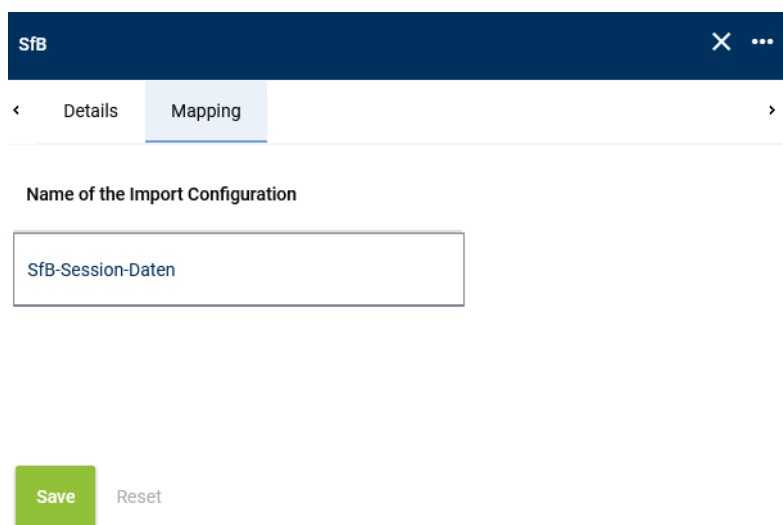


Fig. 35: XSLT Management - tab Mapping

**NOTICE!** The import configuration does not appear until the mapping has been configured and saved in the Configuration Import module.

### 6.1.2.2 Configure configuration import job

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

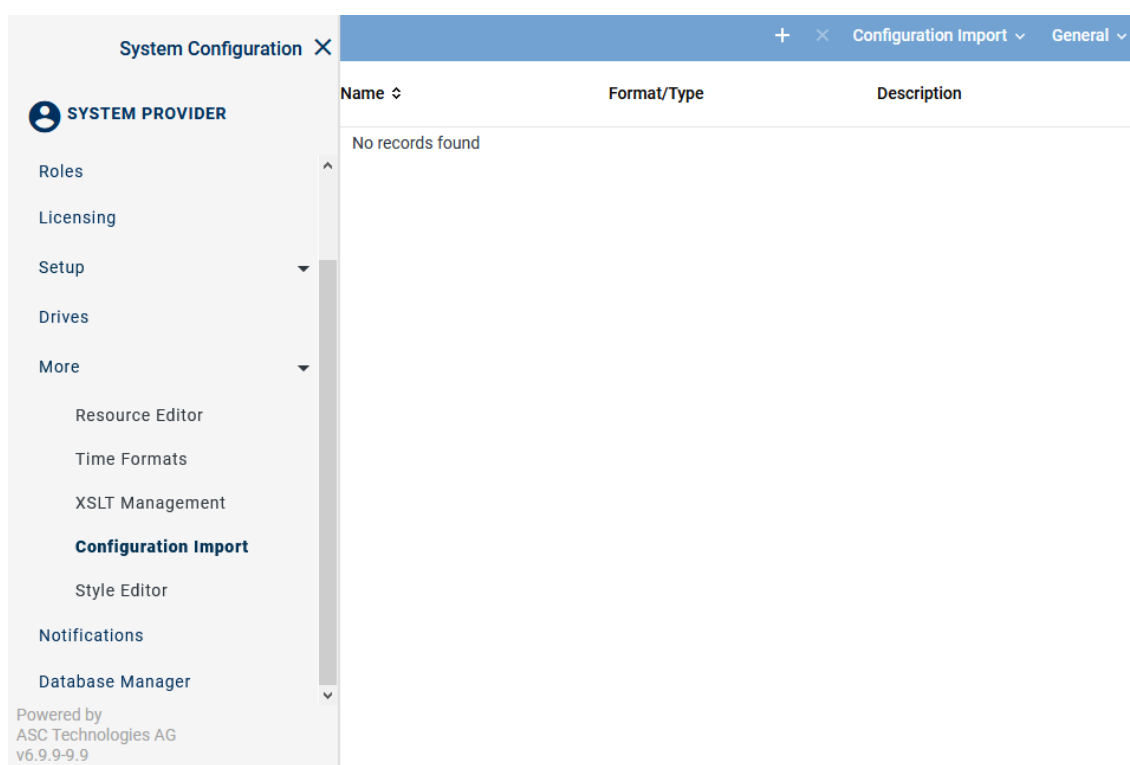



Fig. 36: Configuration Import module - main view

#### 6.1.2.2.1 Create import source

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



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

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

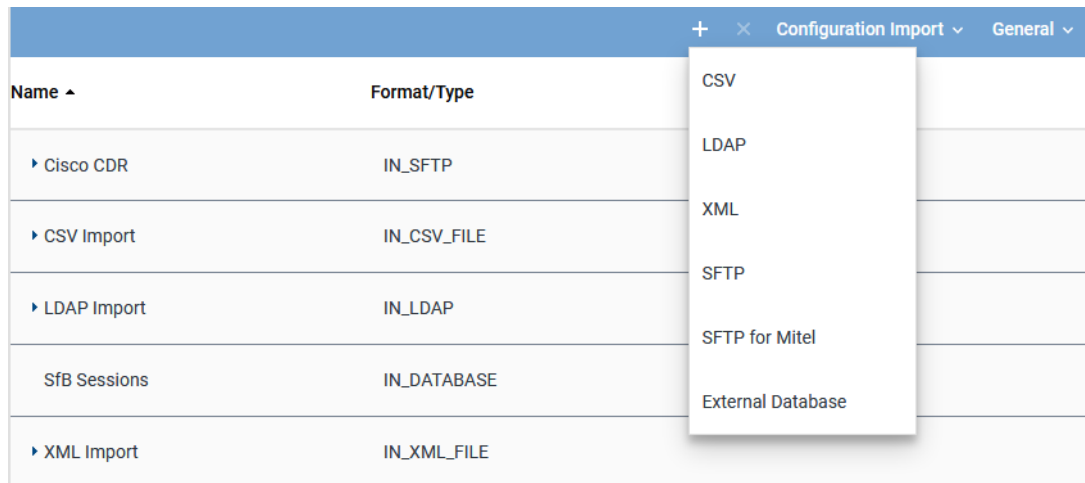



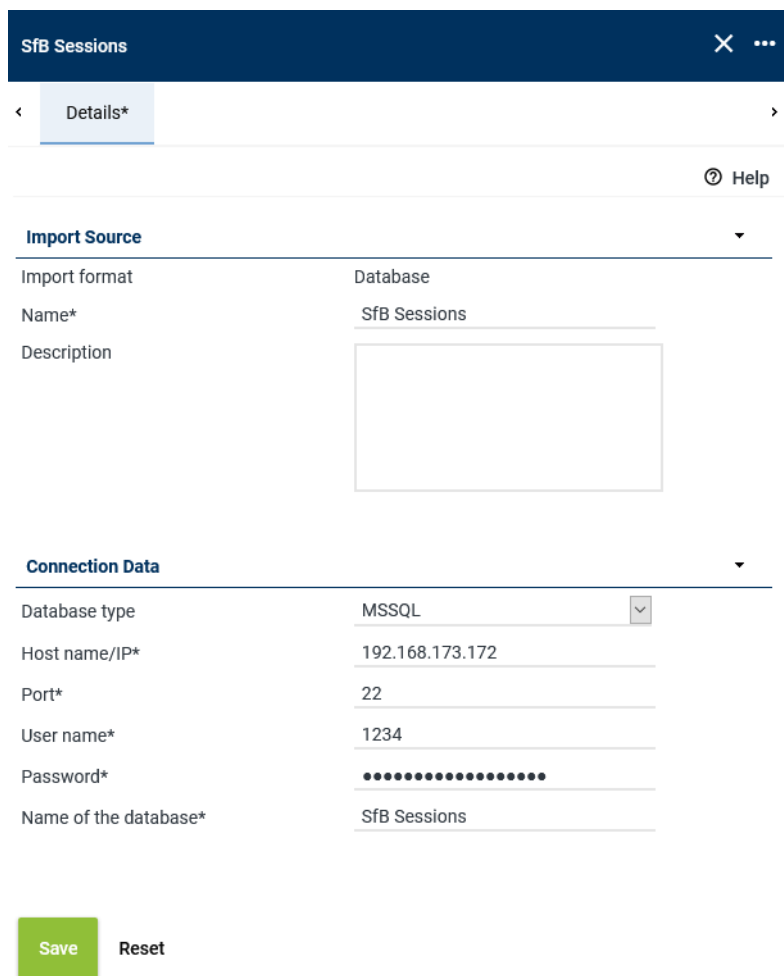
Fig. 37: Create import source

#### Create import source for an external database

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

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

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



The screenshot shows a web interface for configuring an import source. At the top is a dark blue header with 'SfB Sessions', a close button (X), and a menu button (three dots). Below the header is a navigation bar with 'Details\*' selected. A 'Help' icon is on the right. The main content area is divided into two sections: 'Import Source' and 'Connection Data'. The 'Import Source' section has fields for 'Import format' (set to 'Database'), 'Name\*' (set to 'SfB Sessions'), and 'Description' (an empty text area). The 'Connection Data' section has fields for 'Database type' (a dropdown set to 'MSSQL'), 'Host name/IP\*' (set to '192.168.173.172'), 'Port\*' (set to '22'), 'User name\*' (set to '1234'), 'Password\*' (masked with dots), and 'Name of the database\*' (set to 'SfB Sessions'). At the bottom are 'Save' and 'Reset' buttons.

Fig. 38: Detail view - Configure import source for an external database

3. Enter the following parameters:

#### Group field Import Source

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

#### Group field Connection Data

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

1. Click on the button **Save** to save the entries.

- ⇒ The import source appears in the main view.
- Now, you can configure an import job for this import source.

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

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

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

### Tab Details

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

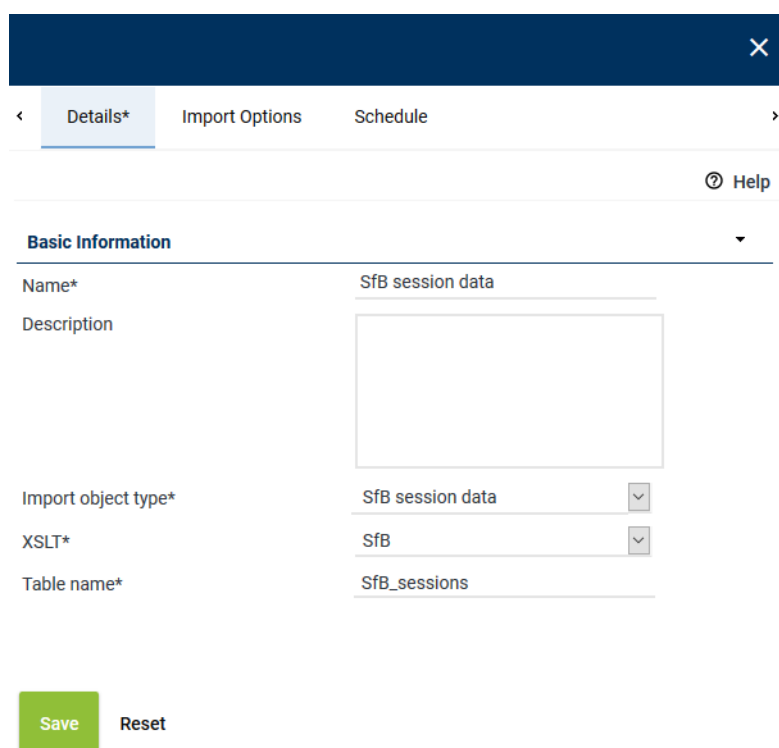


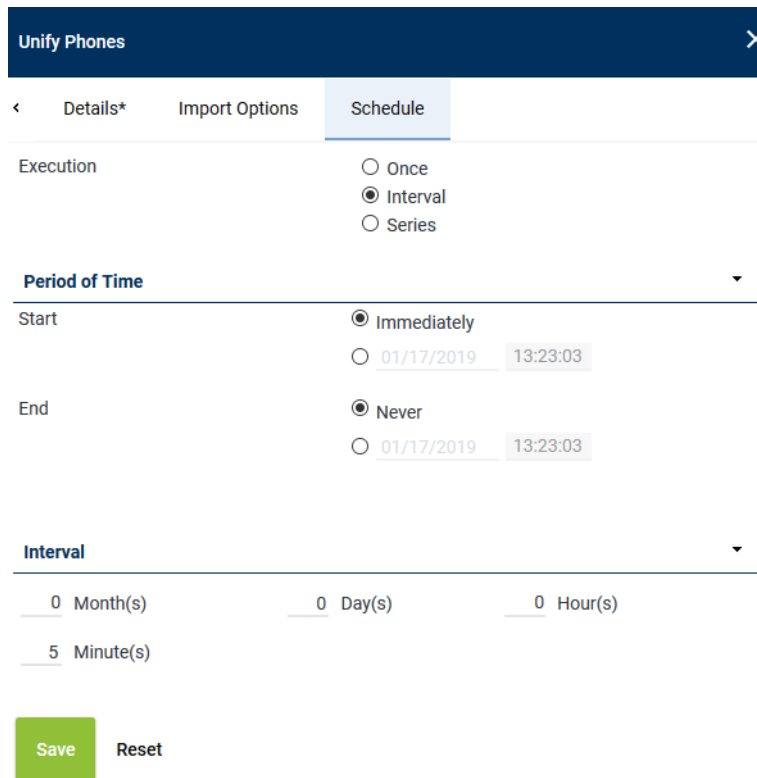
Fig. 39: Import configuration - Tab Details for the import from external database

- Enter the following parameters:

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

### Tab Schedule

In this tab, you can configure the schedule.



**Unify Phones** [X]

< Details\* Import Options **Schedule**

Execution ☐ Once ☒ Interval ☐ Series

**Period of Time** ▼

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

End ☒ Never  
☐ 01/17/2019 13:23:03

**Interval** ▼

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

**Save** **Reset**

Fig. 40: Tab Schedule

Select how often the job is supposed to be executed.

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

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

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



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

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





### Group field Period of Time

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

**Period of Time** ▼

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

Fig. 41: Schedule - Period of Time

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

### Group field Interval



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

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

**Interval** ▼

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

Fig. 42: Schedule - Interval

1. Enter the values directly into the entry fields via the keyboard.

### Save import job

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

### 6.1.2.3 System Monitoring Check Jobs module

Once the configuration job has been started, a monitoring notification about the execution status appears in the application *System Monitoring*.

1. Log in to the application *System Monitoring* as administrator of the system provider.
2. Select the menu item *Jobs* in the navigation bar.
3. In the column *Name*, search for the name of the configuration job.  
⇒ The detail view displays the details of the job.

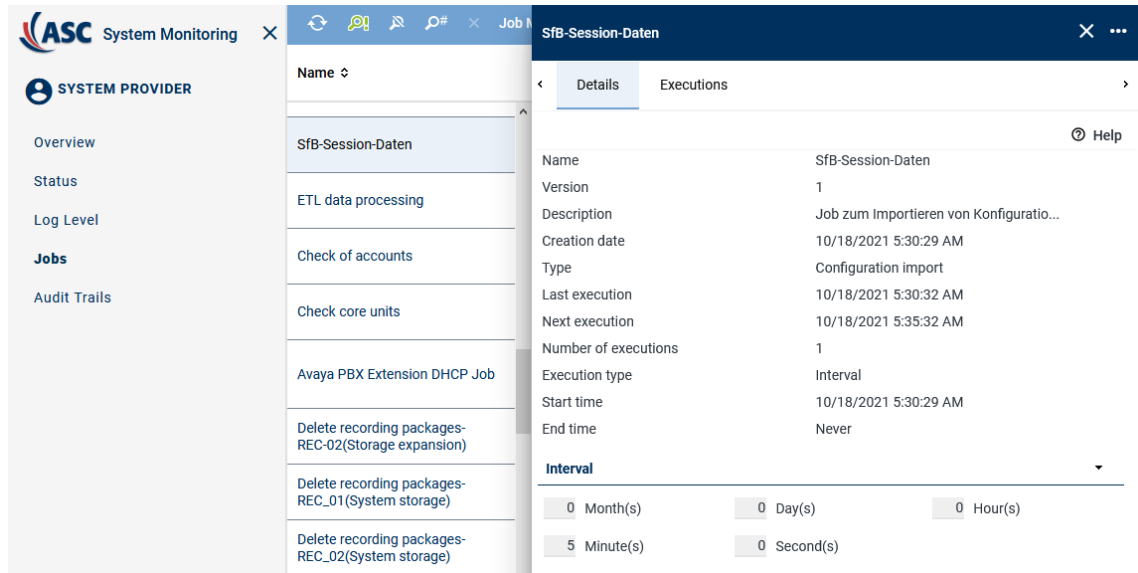


Fig. 43: System Monitoring - Jobs module - details of the configuration job

<i>Name</i>	Displays the name of the configuration job.
<i>Version</i>	Displays the version of the configuration job.
<i>Description</i>	Displays a description of the configuration job.
<i>Creation date</i>	Displays the creation date of the configuration job.
<i>Type</i>	Displays the type of the job
<i>Last execution</i>	Displays the date of the last execution.
<i>Next execution</i>	Displays the date of the next execution.
<i>Number of executions</i>	Displays the number of executions so far.
<i>Execution type</i>	Displays the execution type of this job, whether the job is supposed to be executed once or repeatedly.
<i>Start time</i>	Displays when the job is supposed to start running.
<i>End time</i>	Displays until when the job is supposed to be running.

Tab. 5: Details of the configuration job

#### Group field Interval

When a cyclic job has been configured, then this group field displays the configured repetitions of the interval.

<i>Interval</i>	Displays the interval in which the execution is repeated. <ul style="list-style-type: none"> <li>• <i>Month</i></li> <li>• <i>Day(s)</i></li> <li>• <i>Hour(s)</i></li> <li>• <i>Minute(s)</i></li> </ul>
-----------------	---

- *Second(s)*

Tab. 6: Details of the configuration job

#### 6.1.2.4 INSIGHTneo Create report

To assess the results, you can create a report in the application INSIGHTneo.

1. Log in to the application INSIGHTneo as system administrator.

##### 6.1.2.4.1 Report templates

In the Report Templates module, ASC provides a large number of default report templates to create reports on different topics.

1. Select the menu item *Report Templates* in the navigation bar.

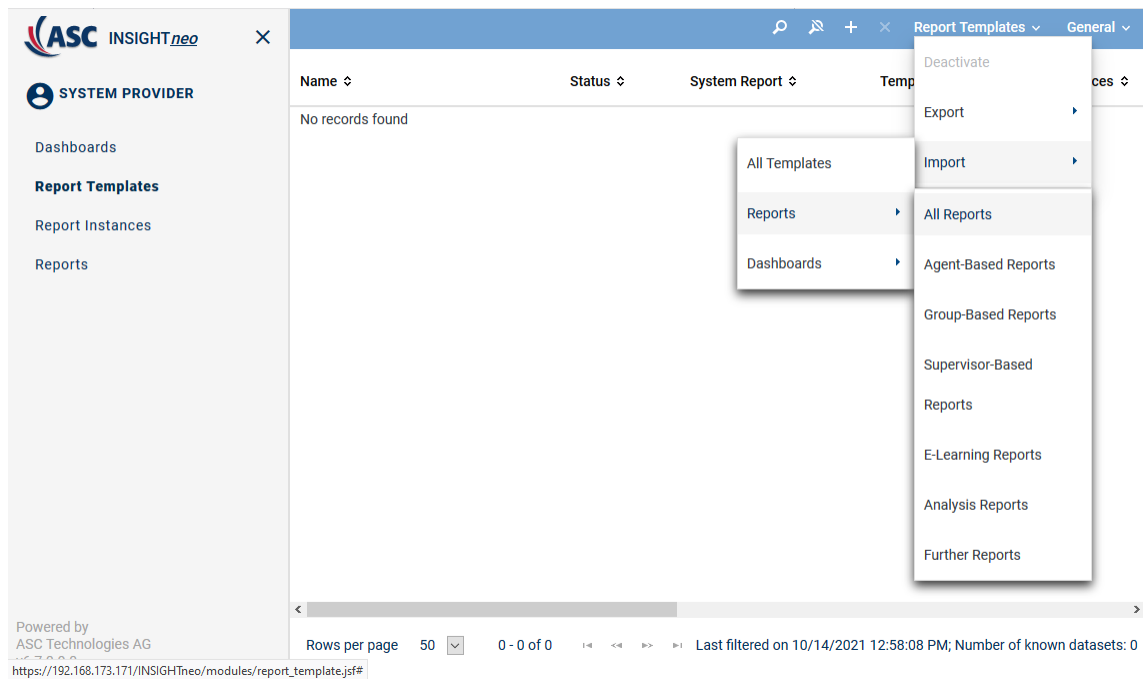


Fig. 44: INSIGHTneo - Report Templates module

2. Select the menu item *Report Templates > Import > Reports > All Reports* in the toolbar.  
⇒ A window to select default report templates opens.

System Report Template Selection			✕
Recording Check Cisco	9	English	<div>⬆</div> <div>⬇</div>
Recording Check Cisco	10	German	
Recording Check Mitel	1	English	
Recording Check Mitel	1	German	
Recording-Check SfB	5	English	
Recording-Check SfB	5	German	
Sprachaufzeichnungen (System)	8	German	
Störungen im Voice-Recording	6	German	
System disturbances	7	English	
System usage per tenant	21	English	
Voice recordings (system)	8	English	

Fig. 45: Select report template for SfB

3. Select the report template *Recording Check SfB*.
4. Click on the button *Import*.
  - ⇒ The report template appears in the main view.

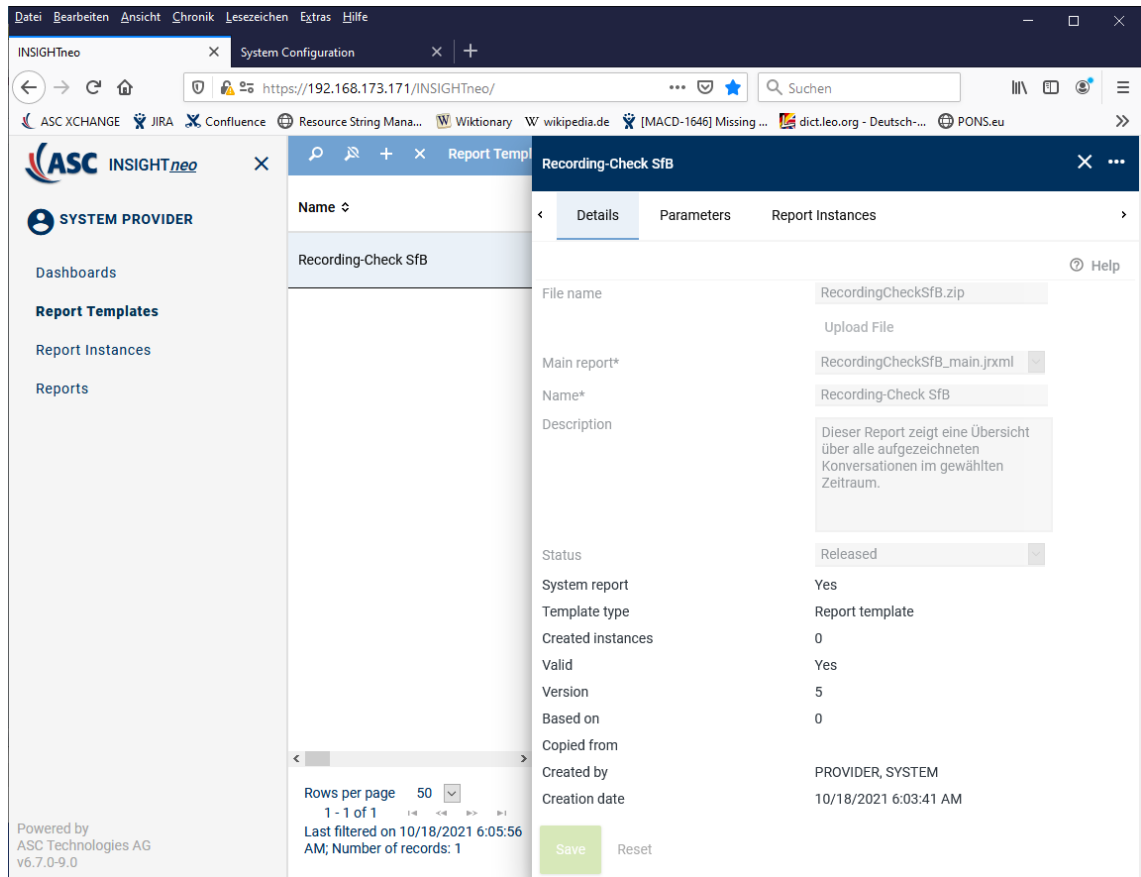


Fig. 46: INSIGHTneo - Report for Recording Check Mechanism


5. Select the report template in the main view to display its details.  
**NOTICE!** It is not possible to edit default report templates.  
 The report's parameters are edited in the report instance in the Report Instances module.



For information about using the Report Templates module and the Report Instances module refer to the respective INSIGHTneo user manuals.

#### 6.1.2.4.2 Report instances

A report instance is the detailed configuration of a report template which defines which data is supposed to be displayed in the report. A report is created based on the report instance and the configured parameters at the defined moment in time.

1. In the navigation bar, select the menu item *Report Instances* to configure the parameters of the report instance.
2. Click on the icon  in the toolbar of the main view.
3. Select the menu item *Reports > All Reports*.  
 ⇒ A window with the available default report templates opens.
4. Select the report template *Recording Check Sfb*.  
 ⇒ The information about the report template are displayed.
5. Click on the button *OK*.  
 ⇒ The detail view displays the parameters of the report template that can be configured. Here, you can define the parameters which are supposed to be used to create the reports and to display the results.

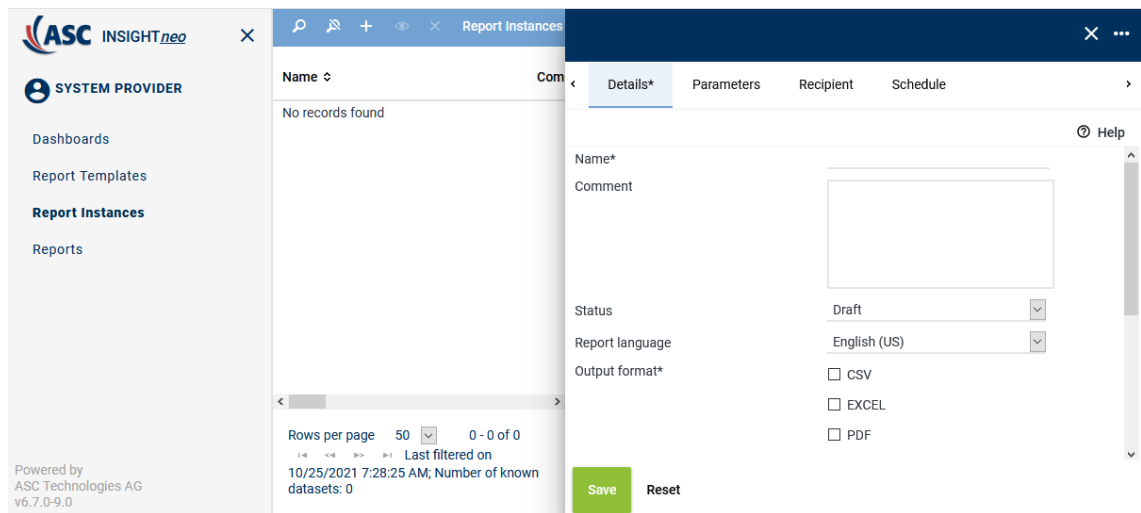


Fig. 47: Main view - report instances

### Tab Details

1. In the tab *Details*, select the output format in which the report is supposed to be issued.

The following output formats are available:

- CSV
- EXCEL
- PDF

### Tab Parameters

1. In the tab *Parameters*, select the period of time that the report is supposed to cover.

### Tab Recipient

1. In the tab *Recipient*, select the user who is supposed to be sent the report.

### Tab Schedule


1. In the tab *Schedule*, select the execution parameters.  
We recommend the report to be issued periodically as a series.



For information about using the Report Templates module and the Report Instances module refer to the respective INSIGHTneo user manuals.

#### 6.1.2.4.3 Reports

The created reports are displayed in the Reports module.

1. Select the respective report.
2. By clicking on the icon  (*Display*), you can view the report and download to save it, if required.

### RecCheck - SfB

Report template: Recording Check SfB  
created: 10/20/21 12:19:15 PM

This Report shows an overview of all not recorded Skype for Business-conversations the selected timespan.

This report shows all not recorded Skype for Business-conversations between 2021-01-01 12:00:00.0 and 2021-12-31 11:59:59.997.

Count recorded calls

0

Count relevant calls

20

Captured in system

0.00 %

Ext. Ref.	Starttime	Caller	Called
0e9a9c91119a121e1f990fa23706791b	10/20/21 12:54 PM	4100	4015
1c55e70639c94ea44ab9b6ffc2299221	10/20/21 12:54 PM	4100	4015
2664a7ce3352ed52c87406575bb1c819	10/20/21 12:54 PM	4100	4015
278fdcfad8a25fb1d7c939c103f38288	10/20/21 12:54 PM	4100	4015
3ea4e46e6d56fc0dca95fb6682642c2b	10/20/21 12:54 PM	4100	4015
4372cef1d56afdb3a5bd34ef91dfde1d	10/20/21 12:54 PM	4100	4015
52d058acb70ed03affe20a3f44f57662	10/20/21 12:54 PM	4100	4015
71800f5477c87a3361df4b7b99262e42	10/20/21 12:54 PM	4100	4015
8828539e8aa5f48da54a9251b3cc123	10/20/21 12:54 PM	4100	4015
882ebac91e9c8603b0d44acd11862c2b	10/20/21 12:54 PM	4100	4015
aab408f5479ae3f7c262ba57cb1076a8	10/20/21 12:54 PM	4100	4015
c76fb791f0bcd53fd2b6f15331c8f16d	10/20/21 12:54 PM	4100	4015
cb85ced2dd0d53aefdfa186d20f6821d	10/20/21 12:54 PM	4100	4015
cd0c22abc1d8b84c42e8b2f557a2615a	10/20/21 12:54 PM	4100	4015
cf389713e40a0b95313e6cfc0a7a8b8a	10/20/21 12:54 PM	4100	4015
d1c48311c9e6e53e19248a59bdb43a22	10/20/21 12:54 PM	4100	4015
d6b6163b405acc9c9567654ab3a42b84	10/20/21 12:54 PM	4100	4015
f476f1b5e94afa36a5191b262772fac6	10/20/21 12:54 PM	4100	4015
f6902ea9fd1bb6a310f888c756c18023	10/20/21 12:54 PM	4100	4015

Fig. 48: Report - Recording Check Mechanism for SfB

In the example, all conducted calls have not been recorded.

The list displays calls which have actually been conducted but for which there are no recordings in the recording system.

The recipient receives the report as an attachment in an e-mail.

## 6.2 Import evaluation templates

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

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



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

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




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

### 6.2.1 Create import source

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



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

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


Name ▲		Format/Type
		CSV
▶ Cisco CDR		IN_SFTP
▶ CSV Import		IN_CSV_FILE
▶ LDAP Import		IN_LDAP
SfB Sessions		IN_DATABASE
▶ XML Import		IN_XML_FILE

Fig. 49: Create import source

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

- *XML*

#### 6.2.1.1 Create import source for XML import

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

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



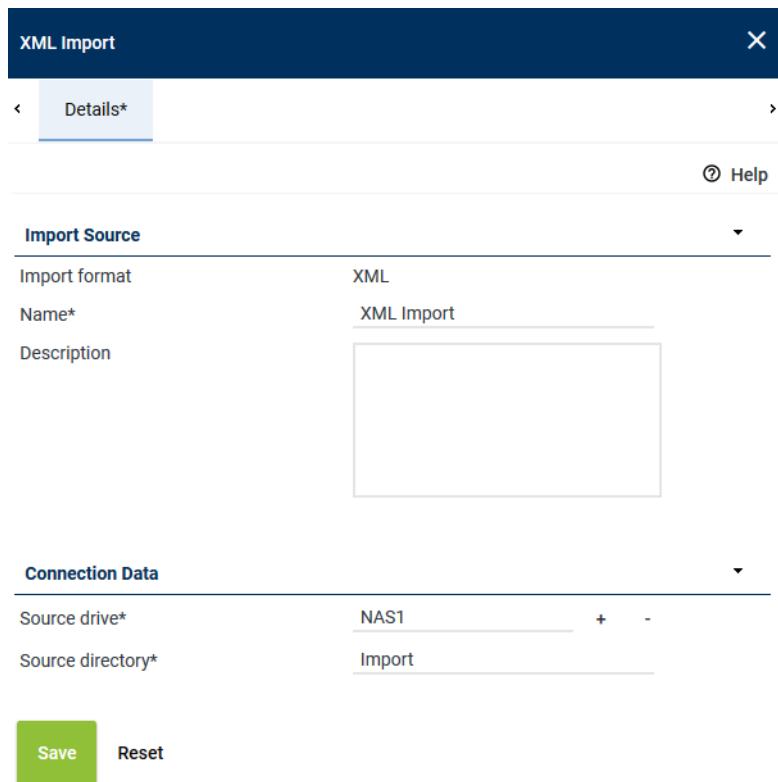


Fig. 50: Detail view Configure import source for XML

3. Enter the following parameters:

#### Group field Import Source

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

#### Group field Connection Data

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

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

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

##### 6.2.1.1.1 Create import job

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

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

Create import job for XML import

Tab Details

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

XML - Evaluation template

<

Details\*

Import Options

Schedule

>

Help

Basic Information

Name\*

XML - Evaluation template

Description

Import object type\*

Evaluation template

XSLT\*

XML - Evaluation template

Save

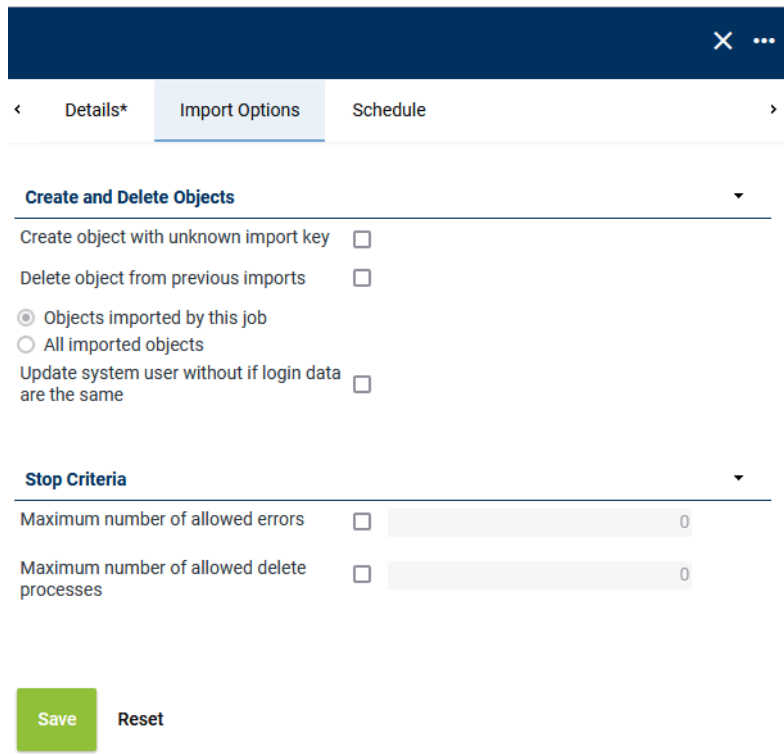
Reset

Fig. 51: Import configuration - Tab Details for the import of evaluation templates

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

Tab Import Options

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



Details\* Import Options Schedule

**Create and Delete Objects**

Create object with unknown import key ☐

Delete object from previous imports ☐

☒ Objects imported by this job

☐ All imported objects

Update system user without if login data are the same ☐

**Stop Criteria**

Maximum number of allowed errors ☐ 0

Maximum number of allowed delete processes ☐ 0

Save Reset

Fig. 52: Import configuration - tab Import Options

### Group field Create and Delete Objects

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

### Group field Stop Criteria

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

### Maximum number of allowed delete processes

Select whether the deletion process is supposed to be canceled if automatic deletion processes occurs.

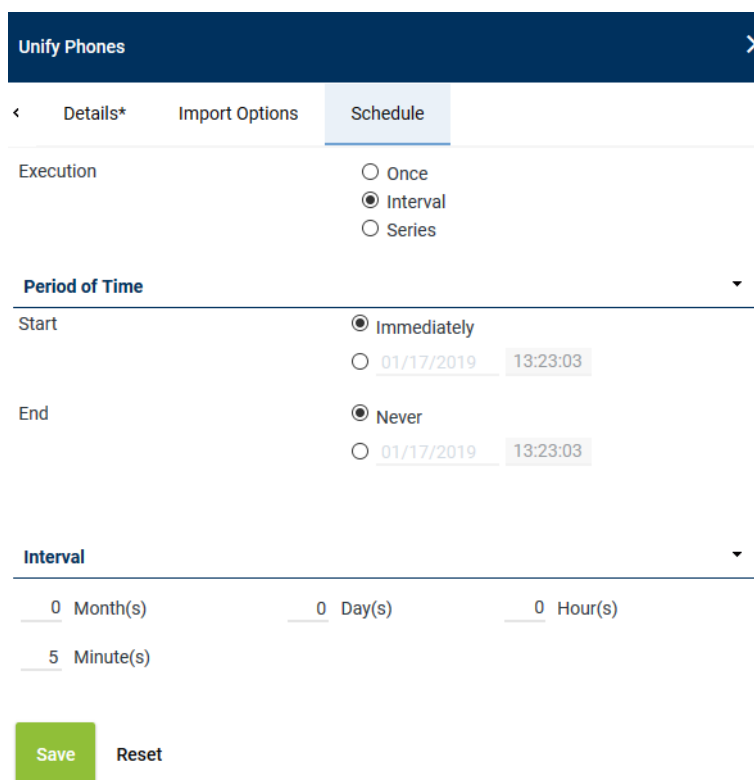
If the option *Delete objects from previous imports* has been selected in the group field *Create and Delete Objects*, then this option here allows selecting the maximum number of data sets which can be deleted before the deletion process is canceled. If the entered number is exceeded, no data sets are deleted.

☒ = Deletion process is canceled when the number of deletion processes entered here is exceeded.

☐ = Deletion process is not canceled.

### Tab Schedule

In this tab, you can configure the schedule.



**Unify Phones** [X]

< Details\* Import Options **Schedule**

Execution

☐ Once  
☒ Interval  
☐ Series

**Period of Time** ▼

Start

☒ Immediately  
☐ 01/17/2019 13:23:03

End

☒ Never  
☐ 01/17/2019 13:23:03

**Interval** ▼

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

**Save** Reset

Fig. 53: Tab Schedule

Select how often the job is supposed to be executed.

### Execution

- *Once*

Select this option if the job is supposed to be executed only once and started on the date which has been defined in the section *Period of Time*.

- *Interval*

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

- *Series*

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



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

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

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

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

### Group field Period of Time

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

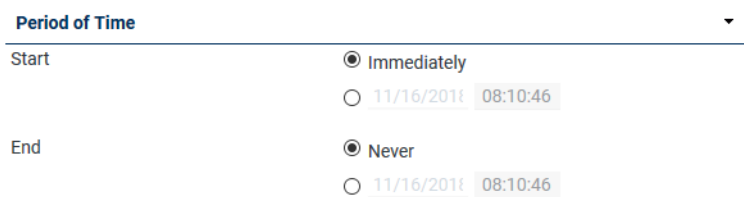




Fig. 54: Schedule - Period of Time

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

### Group field Interval



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

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

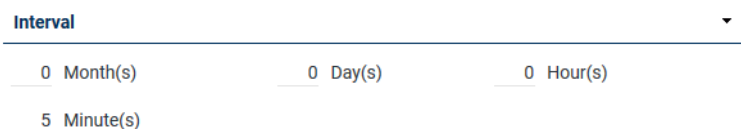


Fig. 55: Schedule - Interval

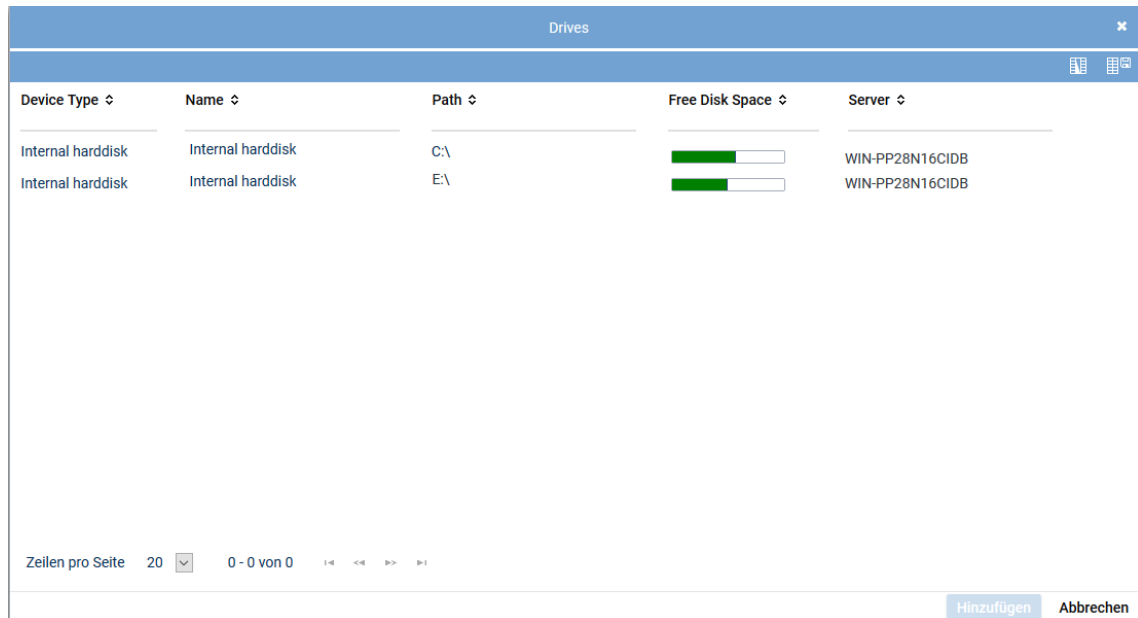
1. Enter the values directly into the entry fields via the keyboard.

### Save import job

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

#### 6.2.1.1.2 Assign drive

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



Device Type	Name	Path	Free Disk Space	Server
Internal harddisk	Internal harddisk	C:\	<div><div></div></div>	WIN-PP28N16CIBD
Internal harddisk	Internal harddisk	E:\	<div><div></div></div>	WIN-PP28N16CIBD

Zeilen pro Seite: 20 0 - 0 von 0

Hinzufügen Abbrechen

Fig. 56: Add drive

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

### 6.3 Import evaluations

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

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



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

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




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

#### 6.3.1 Create import source

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



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

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

+ × Configuration Import ▾ General ▾	
Name ▾	Format/Type
▸ Cisco CDR	IN_SFTP
▸ CSV Import	IN_CSV_FILE
▸ LDAP Import	IN_LDAP
SfB Sessions	IN_DATABASE
▸ XML Import	IN_XML_FILE


CSV  
 LDAP  
 XML  
 SFTP  
 SFTP for Mitel  
 External Database

Fig. 57: Create import source

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

- *XML*

#### 6.3.1.1 Create import source for XML import

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

XML Import
 ×

< Details\* >

ⓘ Help

**Import Source** ▾

Import format XML

Name\* XML Import

Description

**Connection Data** ▾

Source drive\* NAS1 + -

Source directory\* Import

Save Reset

Fig. 58: Detail view Configure import source for XML

- Enter the following parameters:

### Group field Import Source

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

### Group field Connection Data

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

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

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

#### 6.3.1.1.1 Create import job

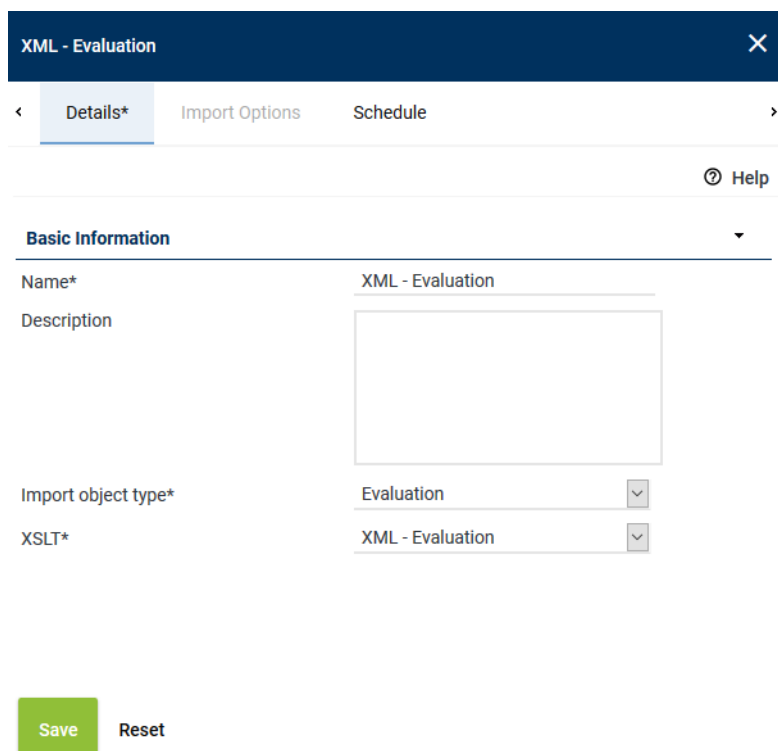
By means of an import configuration, you can create an import job which effects the respective import.

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

### Create import job for XML import

#### Tab Details

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



XML - Evaluation

Details\*
Import Options
Schedule

Help

Basic Information

Name\*
XML - Evaluation

Description

Import object type\*
Evaluation

XSLT\*
XML - Evaluation

Save
Reset

Fig. 59: Import configuration - Tab Details for the import of evaluations



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

### Tab Import Options

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

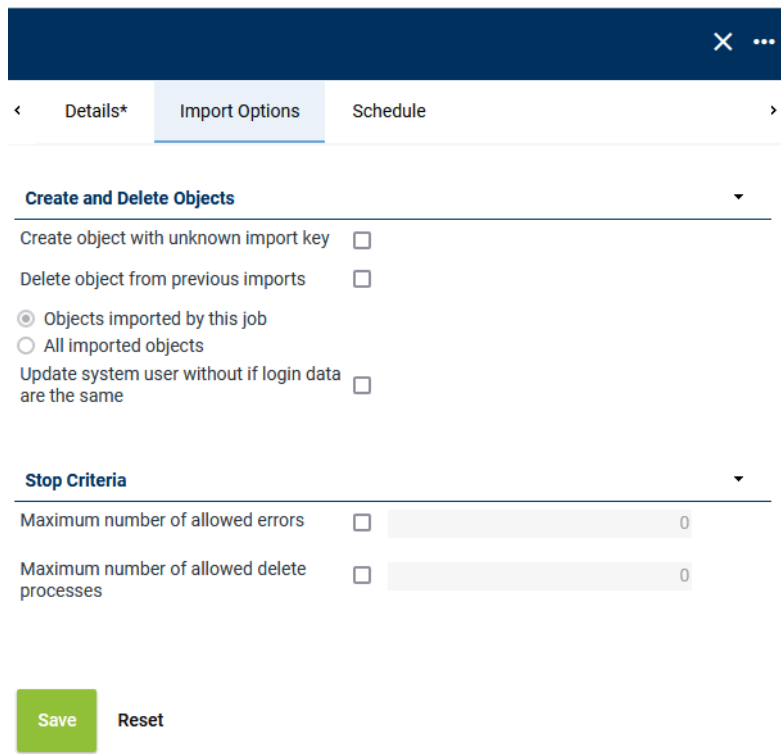


Fig. 60: Import configuration - tab Import Options

### Group field Create and Delete Objects

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

☐ = Phone data cannot be updated.

### Group field Stop Criteria

#### Maximum number of allowed errors

Select whether the import job is supposed to be canceled when an error occurs. Possible errors are failing to assign a [PBX](#), not being able to find a role or organization unit or a user missing essentially required attributes.

☒ = Import job is canceled when the number of errors entered here is exceeded.

☐ = Import job is not canceled.

#### Maximum number of allowed delete processes

Select whether the deletion process is supposed to be canceled if automatic deletion processes occurs.

If the option *Delete objects from previous imports* has been selected in the group field *Create and Delete Objects*, then this option here allows selecting the maximum number of data sets which can be deleted before the deletion process is canceled. If the entered number is exceeded, no data sets are deleted.

☒ = Deletion process is canceled when the number of deletion processes entered here is exceeded.

☐ = Deletion process is not canceled.

### Tab Schedule

In this tab, you can configure the schedule.

Unify Phones

<

Details\*

Import Options

Schedule

Execution

☐ Once
 ☒ Interval
 ☐ Series

Period of Time

Start

☒ Immediately
 ☐ 01/17/2019 13:23:03

End

☒ Never
 ☐ 01/17/2019 13:23:03

Interval

0 Month(s)

0 Day(s)

0 Hour(s)

5 Minute(s)

Save

Reset

Fig. 61: Tab Schedule

Select how often the job is supposed to be executed.

Execution • Once

Select this option if the job is supposed to be executed only once and started on the date which has been defined in the section *Period of Time*.

- *Interval*

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

- *Series*

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

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

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

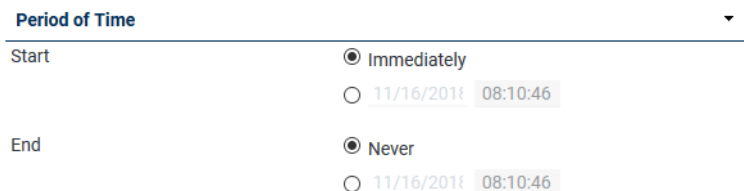


In the application System Monitoring, you receive information about the job status in the Jobs module, see *User manual System Monitoring*.

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

### Group field Period of Time

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



**Period of Time**



Start

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

End

- ☒ Never
- ☐ 11/16/2018 08:10:46

Fig. 62: Schedule - Period of Time

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

### Group field Interval



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

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

**Interval** ▾

Month(s)    
  Day(s)    
  Hour(s)

Minute(s)

Fig. 63: Schedule - Interval

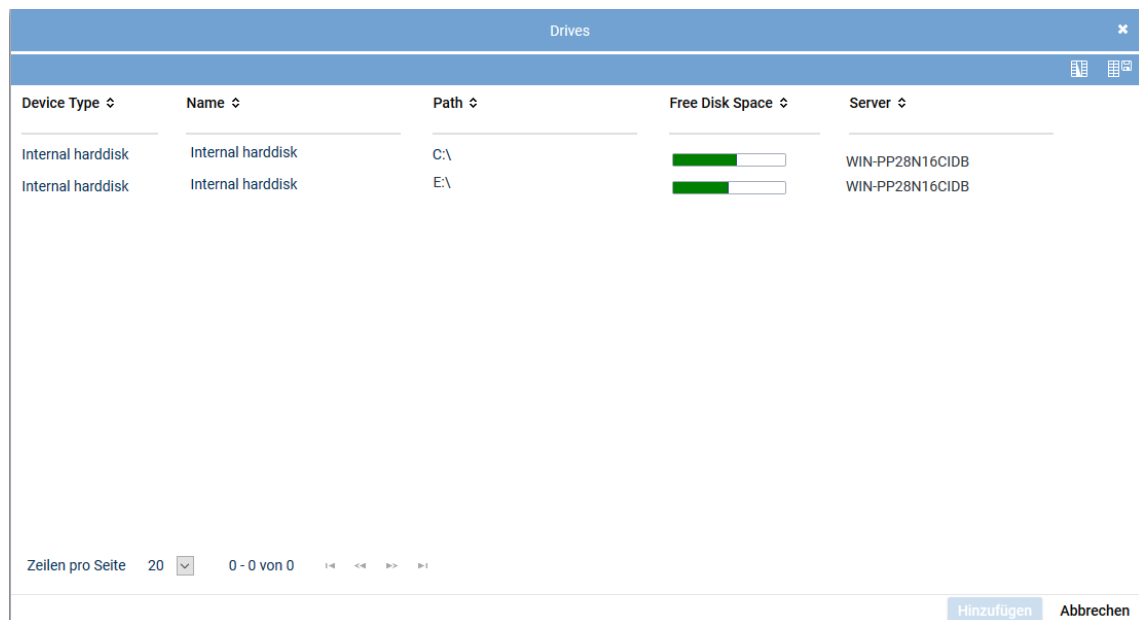
1. Enter the values directly into the entry fields via the keyboard.

### Save import job

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

#### 6.3.1.1.2 Assign drive

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



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

Zeilen pro Seite: 20 ▾ 0 - 0 von 0    < << >> >

Hinzufügen   Abbrechen

Fig. 64: Add drive

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

## 6.4 Call Director customer surveys

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

### Adjust XSLT file

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

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

1. Create a copy of the default XSLT file *Call\_Director\_CUSTOMCP01.xslt*.

- In the copied file, in the parameter *CustomParameter*, replace the preset additional data type **ID CUSTOMCP01** with the **ID** of the additional data type that the call ID is saved in.  
**NOTICE!** Your system provider will provide you with the information which additional data type ID you have to enter.

### Map XSLT files

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



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

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

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

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



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



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


#### 6.4.1

### Create import source

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



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

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


		+ × Configuration Import ▾ General ▾	
Name ▾	Format/Type		
▸ Cisco CDR	IN_SFTP	CSV	
▸ CSV Import	IN_CSV_FILE	LDAP	
▸ LDAP Import	IN_LDAP	XML	
SfB Sessions	IN_DATABASE	SFTP	
▸ XML Import	IN_XML_FILE	SFTP for Mitel	
		External Database	

Fig. 65: Create import source

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

- XML**

#### 6.4.1.1 Create import source for XML import

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

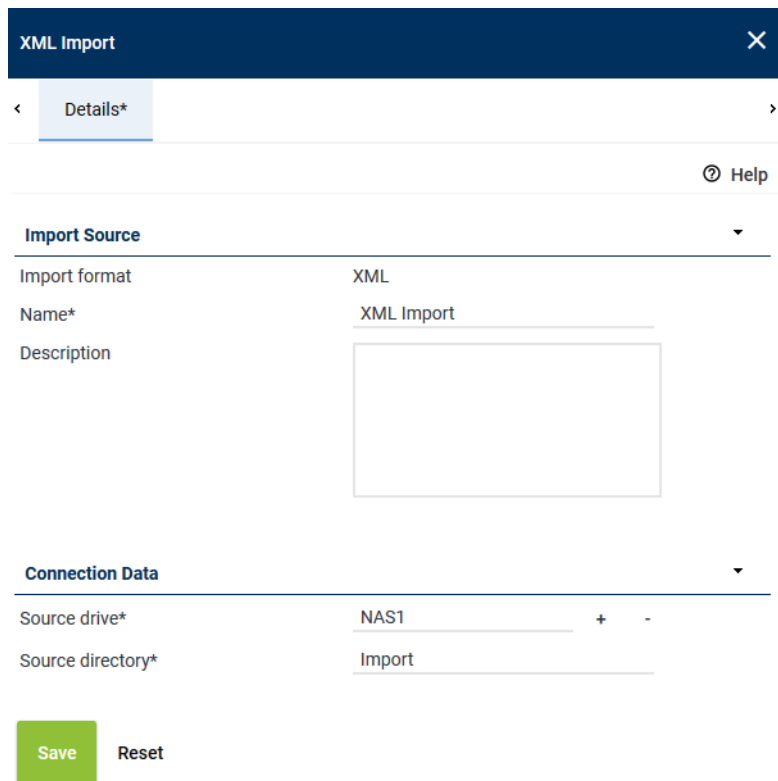


Fig. 66: Detail view Configure import source for XML

3. Enter the following parameters:

##### Group field Import Source

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

##### Group field Connection Data

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

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

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

#### 6.4.1.1.1 Create import job

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

1. In the main view, select the import source for which you would like to configure the import.

- Click on the menu item *Configuration Import* in the toolbar.
- Select the menu item *Create New Import Configuration* from the context menu.

### Create import job for XML import

#### Tab Details

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

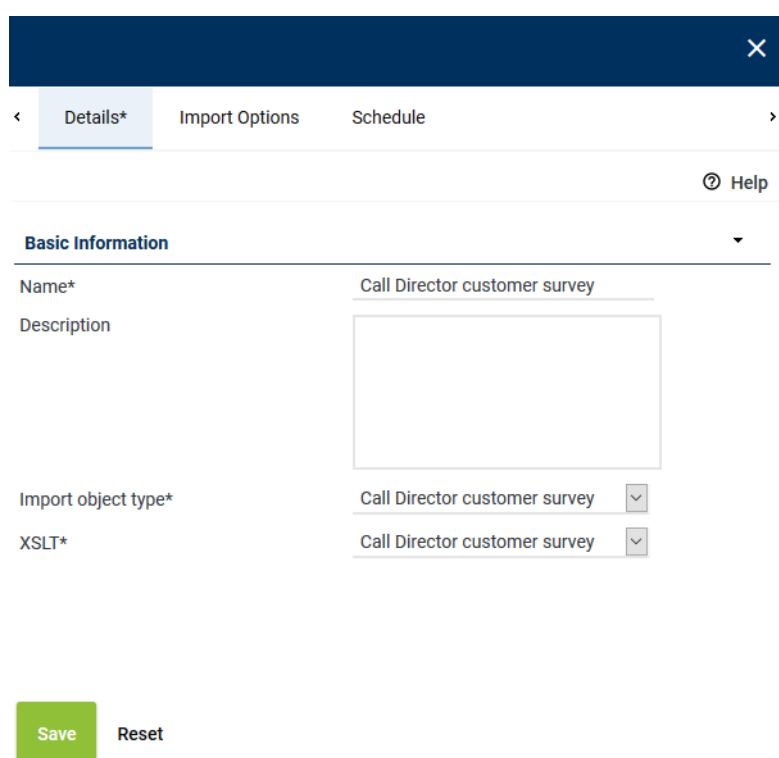
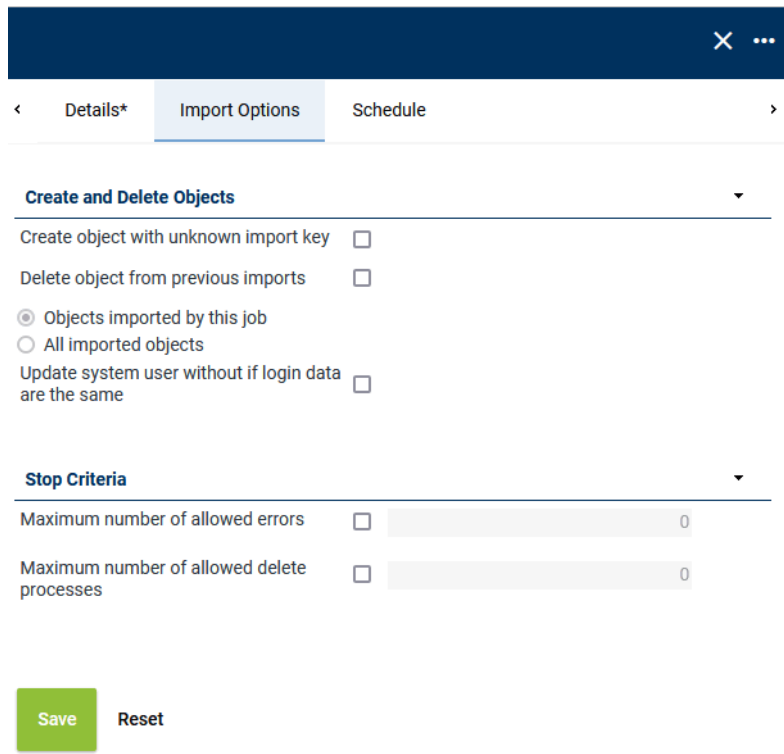


Fig. 67: Import configuration - Tab Details for the import of Call Director customer surveys

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

#### Tab Import Options

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



Details\* Import Options Schedule

**Create and Delete Objects**

Create object with unknown import key ☐

Delete object from previous imports ☐

☒ Objects imported by this job

☐ All imported objects

Update system user without if login data are the same ☐

**Stop Criteria**

Maximum number of allowed errors ☐ 0

Maximum number of allowed delete processes ☐ 0

Save Reset

Fig. 68: Import configuration - tab Import Options

### Group field Create and Delete Objects

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

### Group field Stop Criteria

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



### Maximum number of allowed delete processes

Select whether the deletion process is supposed to be canceled if automatic deletion processes occurs.

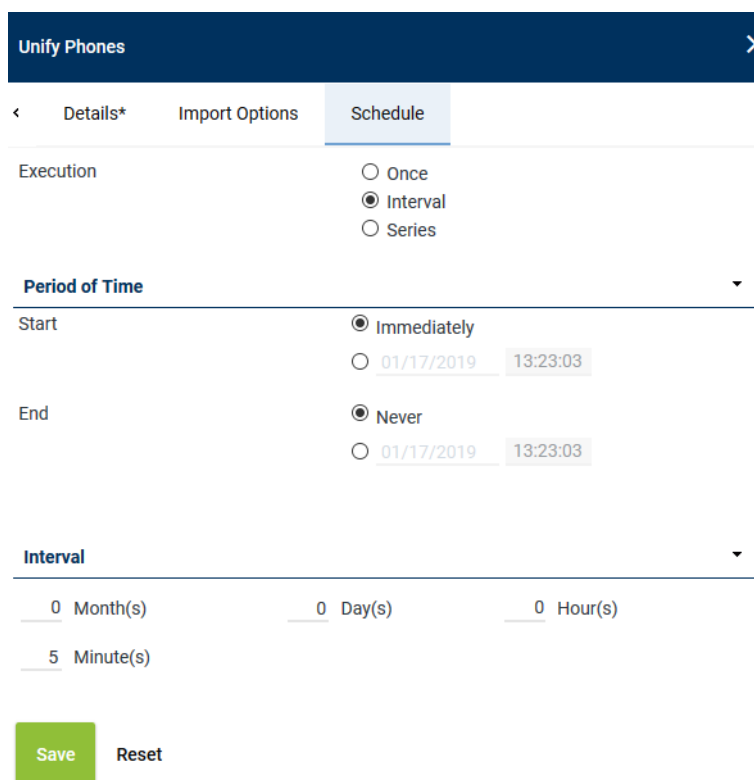
If the option *Delete objects from previous imports* has been selected in the group field *Create and Delete Objects*, then this option here allows selecting the maximum number of data sets which can be deleted before the deletion process is canceled. If the entered number is exceeded, no data sets are deleted.

☒ = Deletion process is canceled when the number of deletion processes entered here is exceeded.

☐ = Deletion process is not canceled.

### Tab Schedule

In this tab, you can configure the schedule.



**Unify Phones** [X]

< Details\* Import Options **Schedule**

Execution  
☐ Once  
☒ Interval  
☐ Series

**Period of Time** ▼

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

End  
☒ Never  
☐ 01/17/2019 13:23:03

**Interval** ▼

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

**Save**    **Reset**

Fig. 69: Tab Schedule

Select how often the job is supposed to be executed.

### Execution

- *Once*

Select this option if the job is supposed to be executed only once and started on the date which has been defined in the section *Period of Time*.

- *Interval*

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

- *Series*

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



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

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

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



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

### Group field Period of Time

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

Period of Time	
Start	<input checked="" type="radio"/> Immediately <input type="radio"/> 11/16/2011 08:10:46
End	<input checked="" type="radio"/> Never <input type="radio"/> 11/16/2011 08:10:46

Fig. 70: Schedule - Period of Time

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

### Group field Interval



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

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

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

Fig. 71: Schedule - Interval

1. Enter the values directly into the entry fields via the keyboard.

### Save import job

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

#### 6.4.1.1.2 Assign drive

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

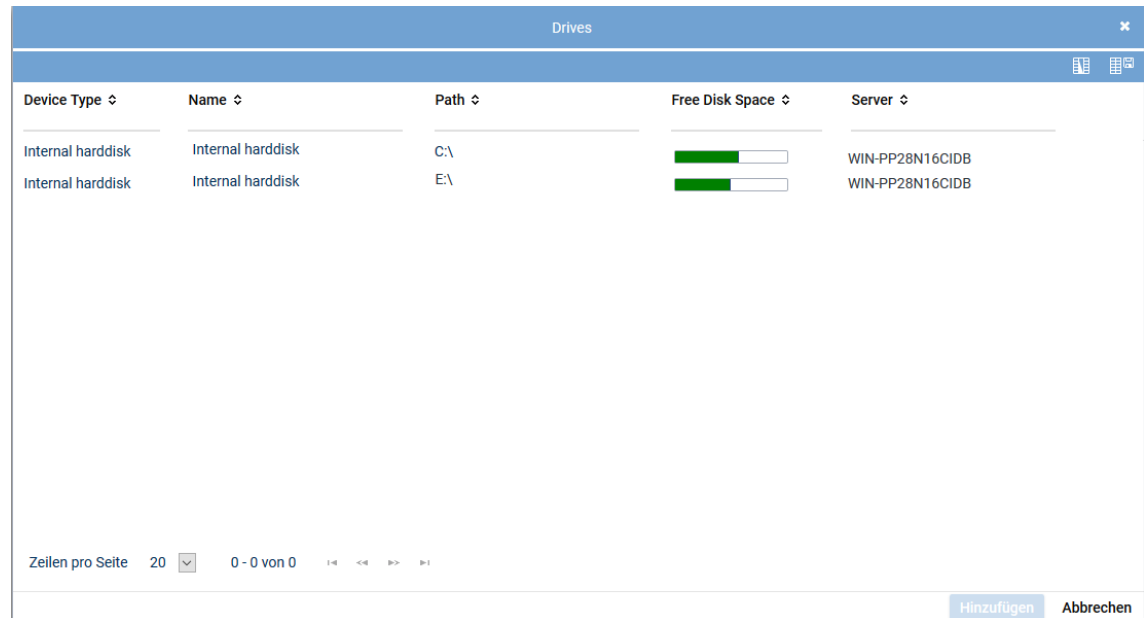


Fig. 72: Add drive

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

## 7 Edit import job



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



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

1. In the main view, select the import job you would like to edit.  
⇒ All settings for the selected import job are displayed in the detail view.
2. Adjust all necessary settings in the tabs of the detail view, see Detail view import configuration.  
You can change tabs without buffering. The settings are not lost.
3. To save the settings, click on the button *Save*.  
To reset all settings or changes in all tabs, click on the button *Reset*.  
To cancel the editing of the job configuration, click on the main view and confirm the security prompt.

## Start and stop import job

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

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

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

⇒ The import job is started immediately.

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

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

---

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

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



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

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

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## Glossary

### CDR

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

### CDR

Call Detail Record or Call Data Record contains information required for an billing system in the telecommunication area. (Source: Wikipedia 02.07.2021)

### Cisco UCM

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

### CSV

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

### ID

Identifier, ID

### LDAP

Lightweight Directory Access Protocol

### NAS

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

### PBX

Private Branch Exchange

### SfB

Skype for Business

### SFTP

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

### XML

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

### XSLT

XSL Transformation, short XSLT, is a programming language to transform XML documents. XSLT is based on the logical tree structure of an XML document and serves to define transformation rules. XSLT programs, so-called XSLT style sheets, are designed according to the

XML standard rules. (Source: Wikipedia 22nd March 2017) The style sheets are read in by dedicated software, the XSLT processors, which transform one or several XML documents into the respective output format based on these instructions.