

System Configuration

Import of phone configurations



Administration manual

for system providers

6/1/2022

Product line Neo, version 7.x

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

EVOIP^{neo}

EVOLUTION^{neo} / XXL / eco

EVO^{flex} (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 <https://www.asctechnologies.com>.

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1 General information

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2 Introduction

This manual describes how phone configurations which have been stored outside the system can be imported into the recording system. This import function allows you to create several phones in one single process.

You can choose to import phone configurations via either of the following modules:

- Phones module

In the Phones module, there is an icon which enables you to initiate a one-off import of a file.

See [chapter "Phones module", p. 36](#).

- Configuration Import module

In the Configuration Import module, you can define import jobs which can be carried out either once or repeatedly. By means of an import job you do not directly access a certain file but rather all files of a certain format type located in a defined source directory. While an import job is active, the recording system checks whether new files are available in the source directory and imports them.

See [chapter "Configuration Import module", p. 20](#).

To map the external data to the data structures of the Neo system, you need XSLT files in any case. Via the XSLT Management module, you can load XSLT files into the Neo system and edit them.



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



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

3 Supported import formats

In general, the following data can be imported:

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

The import function for phone configurations for system providers supports the following import formats:

- XML
- CSV

The import file must at least contain the following information:

- *Import key (ImportKey)*
- *Phone name*
- *PBX name*
- *Display language*
- *Phone type IP_PHONE or TDM_PHONE*



The **PBX** specified in the import file must already exist in the recording system. If no **PBX** with an identical name exists in the recording system, the import fails.

The import is basically the same for any format: First, the data to be imported is converted into a standardized Neo **XML** format and every object type receives the attribute *ImportKey* to be able to unambiguously map them.



When importing data from sources outside the system, make sure that the *ImportKey* is mapped to an unambiguous identifier.

As an alternative to the attribute *ImportKey*, you can use a combination of attributes which clearly identifies the phone configuration.

To map the external data to the data structures of the Neo system, you need individual XSLT files. As an exemplary template for the individual files, ASC provides default XSLT files, see [chapter "XSLT templates", p. 8](#).

4 XSLT templates

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*

The following templates are available for the import of phone configurations:

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.



For information about creating [XSLT](#) mappings refer to the administration manual *XSLT management*.

NOTICE! These [XSLT](#) files serve as an example only. They have to be adapted to the individual structure of the respective import file.



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

5 XSLT Management module

1. To import and edit an XSLT file, select the menu item *More > XSLT Management* in the navigation bar of the application System Configuration.

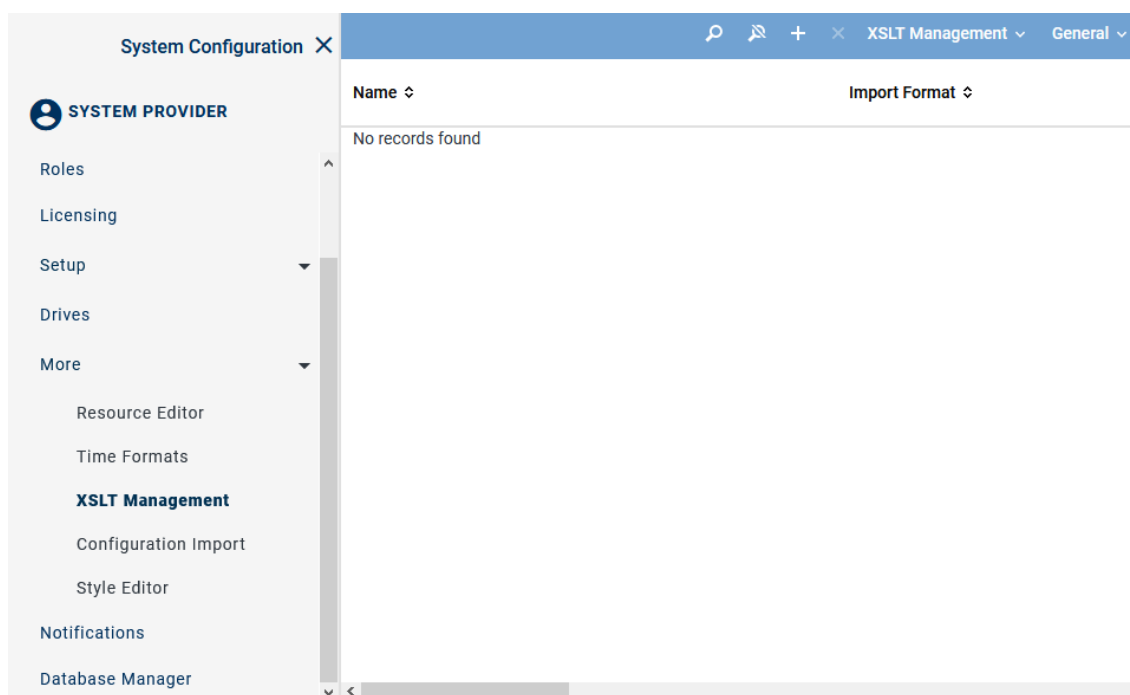


Fig. 1: XSLT Management module - main view

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

<i>Name</i>	Name which has been selected for the XSLT mapping.
<i>Import Format</i>	Import format that the XSLT mapping can be used for.
<i>Import Object Type</i>	Data type that the XSLT mapping can be used for.
<i>Editable</i>	Shows whether the XSLT mapping can be edited. As long as an XSLT mapping is used in an import configuration, you cannot change it. <div> ✓ = XSLT mapping can be edited. ✗ = XSLT mapping cannot be edited. </div>
<i>Description</i>	Optional description of the XSLT mapping.
<i>Creator</i>	Name of the user who has created the XSLT mapping.
<i>Creation Date</i>	Date on which the XSLT mapping was created.
<i>Updated</i>	Date on which the XSLT mapping was updated for the last time.

5.1 Toolbar XSLT Management module

The toolbar offers the following functions.

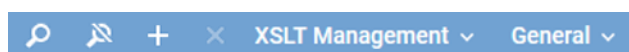









Fig. 2: Toolbar

	Search	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see Search.
		

		The icon  is displayed whenever the search has been adjusted by means of a filter.
	<i>Reset Search</i>	Resets all manually entered search criteria.
	<i>Create New</i>	Creates a new XSLT mapping. You can enter the data in the tab Details, see Create XSLT mapping.
	<i>Create Clone</i>	Creates a clone of an existing XSLT mapping file.
	<i>Delete</i>	Deletes the selected XSLT mapping file. The XSLT mapping file is removed from the list in the main view.
<i>XSLT mapping</i>	<i>Export XSLT file</i>	Opens a window in which you can select the storage location for the file to be exported, see Export XSLT file.
<i>General</i>	<i>Adjust Table</i>	Opens a window where you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns. • Number of rows per page.
	<i>General Help</i>	Opens the online help.
	<i>Module Help</i>	Opens the module-specific online help.

5.2 Create XSLT mapping file

To map content from [XSLT](#) files, a mapping file must exist for each import type. This applies for the import of phone configurations, too.

1. Click on the icon  (*Create*) in the toolbar.
2. From the context menu, select the menu item *Create New* to create a new [XSLT](#) mapping file.

To clone an existing XSLT mapping, select the menu item *Create Clone*.



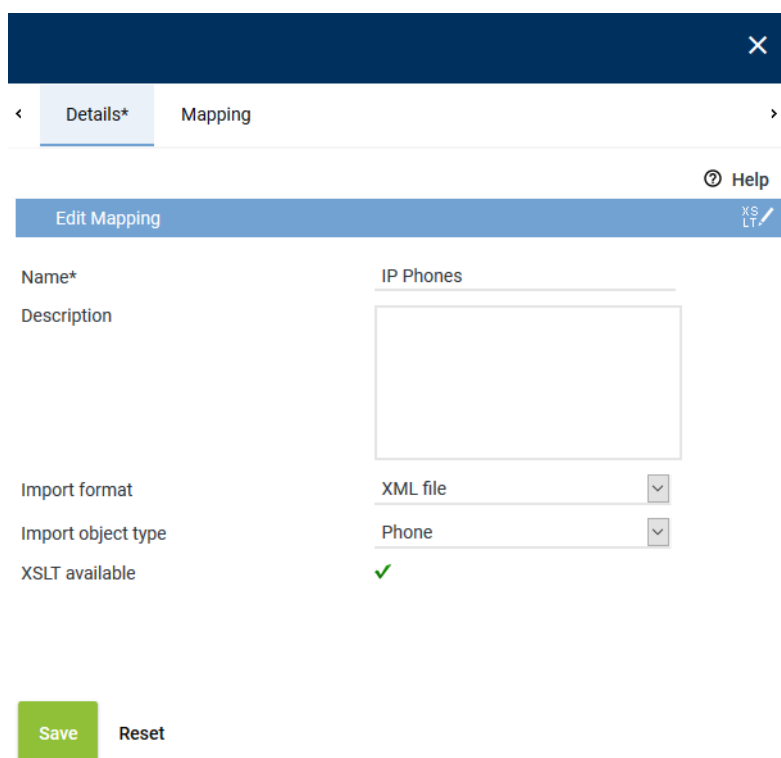
Fig. 3: MXSLT management Create new mapping file

5.2.1 Tab Details for XML import

In this tab, you can create a new [XSLT](#) mapping file for the import of phone configurations as well as import and edit a corresponding [XSLT](#) file.



You can only edit an [XSLT](#) mapping if it is not used in any import configuration, see [chapter "Tab Mapping", p. 19](#).



Details* Mapping

Help

Edit Mapping XSLT

Name* IP Phones

Description


Import format XML file

Import object type Phone

XSLT available ☒

Save Reset

Fig. 4: Create XSLT file for the import format XML

Name	Enter a name for the XSLT mapping.
Description	Optional description of the XSLT mapping.
Import format	Select the import format XML file from the drop-down list.
Import object type	From the drop-down list, select the import object type <i>Phone</i> for the phone configuration import.
XSLT available	Displays whether the selected XSLT mapping already contains an XSLT file. <input checked="" type="checkbox"/> = Contains an XSLT file <input type="checkbox"/> = Does not contain an XSLT file
	Opens a window in which you can load, create or edit an XSLT file, see chapter "XSLT Editor", p. 12 .

5.2.2 Tab Details for CSV import

In this tab, you can create a new [XSLT](#) mapping file for the import of phone configurations as well as import and edit a corresponding [XSLT](#) file.



You can only edit an [XSLT](#) mapping if it is not used in any import configuration, see [chapter "Tab Mapping", p. 19](#).

CSV Import

<

Details*

Mapping

>

Help

Edit Mapping

XSLT

Name*

CSV Import

Description

Import format

CSV file

Import object type

Phone

XSLT available

✓

Save

Reset

Fig. 5: Create XSLT file for the import format CSV

Name	Enter a name for the XSLT mapping.
Description	Optional description of the XSLT mapping.
Import format	Select the import format CSV file from the drop-down list.
Import object type	From the drop-down list, select the import object type <i>Phone</i> for the phone configuration import.
XSLT available	Displays whether the selected XSLT mapping already contains an XSLT file. <div>✓ = Contains an XSLT file</div> <div>✗ = Does not contain an XSLT file</div>
<div>XSLT</div>	Opens a window in which you can import, create or edit an XSLT file, see chapter "XSLT Editor", p. 12 .

5.2.3 XSLT Editor

You can import your own [XSLT](#) files as well as the [XSLT](#) file delivered by ASC and adjust them if required.

The [XSLT](#) Editor allows you to import, edit or create an [XSLT](#) file. In the window title of the [XSLT](#) Editor, you see the import type of the mapping and the [XSLT](#) file it is based on.

XSLT Editor - Phone - Original File Name IPPhoneWithPhoneNumberInsteadOfExtension.xslt

Phonename

Target Element

Phonename
ImportKey
PBX
PBXPhoneID
Extension
PCHostname
DisplayLanguage
ReplayViaPhoneAdresse

Details

Type: Single value

Value: CommonProperties/Phonename

Use default value: ☐

Default value:

Condition

Use condition: ☐



Condition:

Attributes

Apply Text View

Save Cancel

Fig. 6: XSLT Editor







<i>List of the target elements</i>	<p>Displays all elements that the XSLT file defines as target elements in the Neo system.</p> <p>NOTICE! By clicking on the icon  or on  in front of an element, you can show or hide the sub-elements of this element.</p>
<i>Toolbar</i>	<p>Contains different functions for editing the XSLT file, see chapter "Toolbar XSLT Editor", p. 14.</p>
<i>Details</i>	<p>Displays all values and settings of the selected target element.</p> <p>It depends on the selected element which element details are displayed.</p>
<i>Apply</i>	<p>By clicking on the button <i>Apply</i>, the current settings are checked for their validity and are buffered.</p> <p>If you close the XSLT Editor via the button <i>Cancel</i>, the buffered changes are discarded.</p>
<i>Text View</i>	<p>Switches the view of the element details so that the definition of the selected element is displayed in an XML structure. The definition of the element is displayed in the window of a text editor which allows editing it.</p> <p>By clicking on the buttons <i>Text View</i> or <i>Editor View</i>, the view changes; that way, you can switch the editing mode from text format to editor view.</p>
<i>Editor View</i>	<p>Switches the view of the element details so that the definition of the selected element is displayed in a view with dialog elements. The element details can be edited directly via the dialog elements.</p> <p>NOTICE! This display format is not supported for all XSLT structures.</p>
<i>Save</i>	<p>Saves the current settings in a buffer and closes the XSLT Editor.</p> <p>NOTICE! The current settings are not saved in the XSLT file before you conclude the process by clicking on the button <i>Save</i> in the detail view.</p>
<i>Cancel</i>	<p>Closes the XSLT Editor without saving the changes. Even changes which have been buffered by clicking on the button <i>Apply</i> are discarded.</p>

5.2.3.1 Toolbar XSLT Editor


The toolbar offers the following functions.



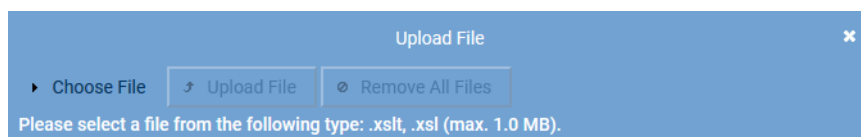
Fig. 7: XSLT Editor - toolbar

	Create	Opens a window via which you can add a target element to the XSLT file.
	Delete	Deletes the selected target element from the list and thus from the XSLT file.
	Display XSLT file as text	Opens a text editor window in which the complete XSLT file is displayed in XML structure and can be edited.
	Create new empty mapping	Creates an XSLT file if there is none yet or replaces the selected XSLT file with a new one upon confirming a security prompt.
	Import XSLT file	Opens a dialog via which you can import an XSLT file, see chapter "Import XSLT file", p. 14 .
	Mapping tester	Opens a dialog in which you can enter the demo data to check whether the current mapping is correct.

5.2.3.2 Import XSLT file

- To import an [XSLT](#) file, click on the button  (*Import XSLT file*) in the toolbar of the [XSLT](#) Editor.

⇒ The following window appears:



Close

Fig. 8: Select XSLT file

- Click on the button *Choose File*.

⇒ The Explorer opens.

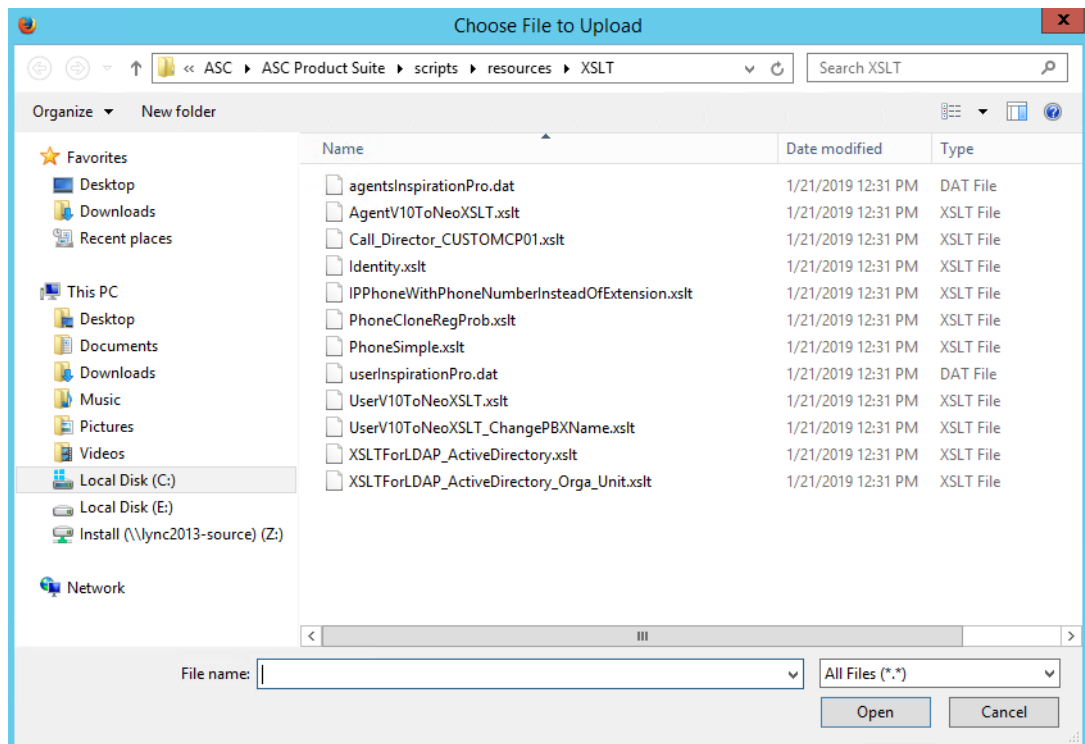


Fig. 9: Select XSLT file from the Explorer

3. Double-click on the template or on an [XSLT](#) file which has already been adjusted to select it.
 - ⇒ The file appears in the dialog window to be uploaded.

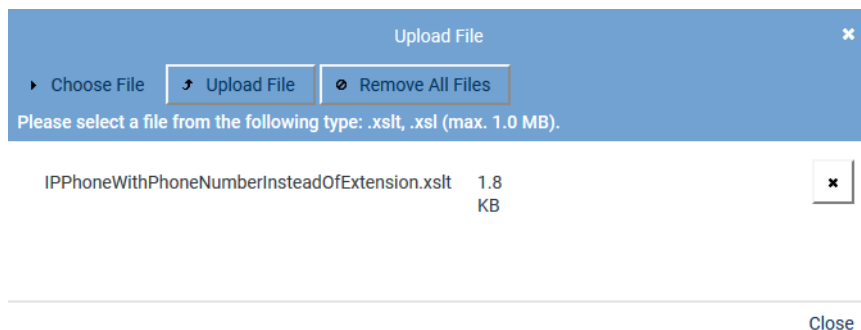


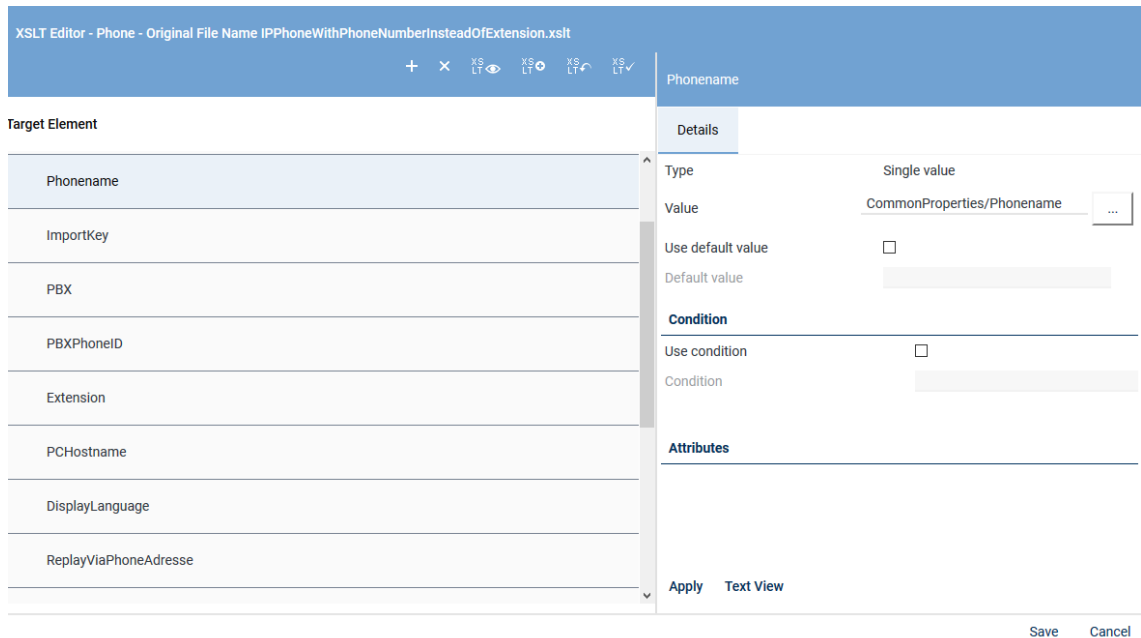
Fig. 10: Upload XSLT file

4. Click on the button *Upload File* to upload the file into the [XSLT](#) Editor.
 - ⇒ The progress indicator shows the current status. Once the upload of the file has been completed, the window closes automatically.

5.2.3.3 Edit XSLT file

In the XSLT Editor, you see the list of the loaded target elements on the left; on the right, you see the values from the [XSLT](#) file that you can map to the target element.

1. Expand the target element by clicking on the arrow next to it.
2. IN the detail view, you see the value from the [XSLT](#) file to be mapped.



XSLT Editor - Phone - Original File Name IPPhoneWithPhoneNumberInsteadOfExtension.xslt

Target Element

Phonename
ImportKey
PBX
PBXPhoneID
Extension
PCHostname
DisplayLanguage
ReplayViaPhoneAdresse

Details

Type: Single value

Value: CommonProperties/Phonename

Use default value: ☐

Default value:

Condition

Use condition: ☐

Condition:

Attributes

Apply Text View

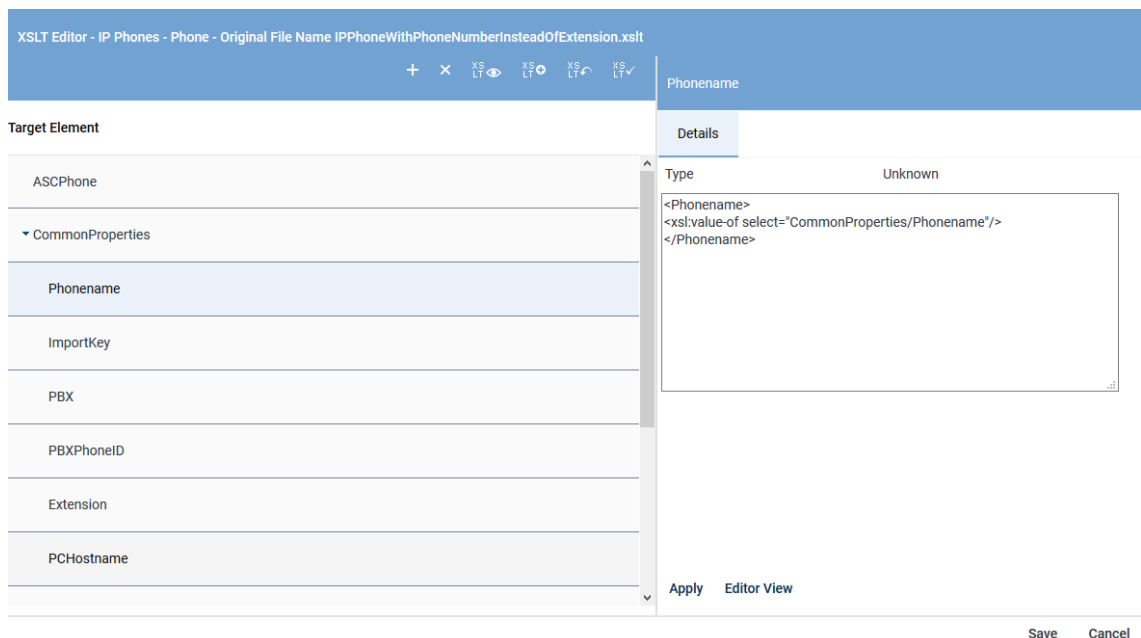
Save Cancel

Fig. 11: Upload XSLT file in the editor

- In the list of target elements, select the target element and assign it to the respective data field in the detail view.

Type The type is set automatically since it depends on the target element.

- To display the value as text, click on the button *Text View*. By clicking on these buttons, you can change between the text view and the editor view. To selected you preferred editing mode.



XSLT Editor - IP Phones - Phone - Original File Name IPPhoneWithPhoneNumberInsteadOfExtension.xslt

Target Element

ASCPPhone
CommonProperties
Phonename
ImportKey
PBX
PBXPhoneID
Extension
PCHostname

Details

Type: Unknown

Value: CommonProperties/Phonename

Use default value: ☐

Condition: ☐

Attributes


Apply Editor View

Save Cancel

Fig. 12: XSLT Editor - text view

- Click on the button *Editor View* to continue the configuration in the Editor.

5.2.3.4 Load value

- Click on the button  on the right of the entry field *Value*.
⇒ A window containing a list of the source attributes from the XSLT file opens.

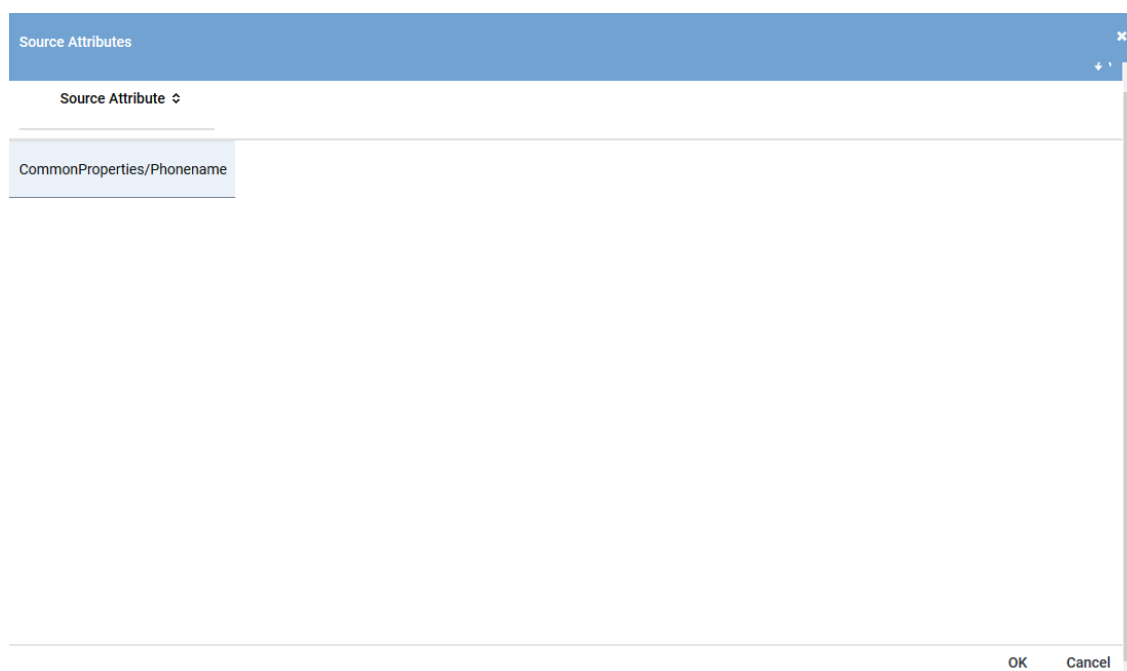


Fig. 13: Select source attributes

2. Select the corresponding source attribute from the displayed list.

<i>Use default value</i>	Activate the check box if you would like to map a default value for this data field that is supposed to be the same for this parameter for the selected target elements.
<i>Default value</i>	If there is supposed to be a default value that is supposed to be the same for the selected target elements, enter this value here.

3. Click on the button *OK* to apply the selected source attribute in the entry field *Value* and close the window.

5.2.3.5 Group field Condition

In this group field, you can define a condition which has to be fulfilled so that the read-out value is applied in the target element.

Condition	
Use condition	<input checked="" type="checkbox"/>
Condition	<input type="text"/>

Fig. 14: Group field Condition

<i>Use condition</i>	<input checked="" type="checkbox"/> = The condition entered in the field <i>Condition</i> is used. <input type="checkbox"/> = The condition entered in the field <i>Condition</i> is ignored.
<i>Condition</i>	Enter the XSL-compliant description of the condition. Examples: <ul style="list-style-type: none"> • <i>name</i> Via this condition, you can check whether the current set of data includes a tag with the description "name". • <i>age > 20</i> (<i>></i> is the HTML entity for the character ">")

Via this condition, you can check whether the current set of data includes a tag with the description "age" and whether its value is larger than 20.

5.2.3.6 Group field Attributes


In this group field, you can define attributes which are supposed to be mapped to the target element.

Attributes


Attribute Name	Attribute Val
No records found	
Add	Delete





Fig. 15: Group field Attributes

<i>Attribute name</i>	XML-compliant name that the attribute is supposed to have.
<i>Attribute value</i>	Value which is supposed to be entered in the attribute.

Add	Adds a new entry to the list. Open the new entry (<i>New Value</i>) to enter a new attribute with the corresponding value, see chapter "Edit entry", p. 18 .
Delete	Deletes the selected attribute from the list.
	Opens the selected attribute to be edited, see chapter "Edit entry", p. 18 .



5.2.3.6.1 Edit entry

- To adjust an entry in the list, click on the icon  (*Edit*) in the corresponding line.
⇒ The entry is edited in an entry field.

0002150015555	
0602150014444	
New value	 

[Add](#) [Delete](#)

Fig. 16: Edit entry in the list

- Adjust the entry.
- To save the changes, click on the icon  (*Save*).
To discard the changes, click on the icon  (*Discard*).

5.2.3.7 Apply settings

- Click on the button *Apply* to save this element.
- Click on the button *Save* to apply the settings and to close the window.



For information about creating **XSLT** mappings refer to the administration manual *XSLT management*.

Once you have imported and adjusted an **XSLT** file, you can import the phone configuration in the Phones module or in the Configuration Import module.

5.2.4 Tab Mapping

This tab displays the names of the import configurations which have been created in the Configuration Import module and in which this XSLT mapping is used.

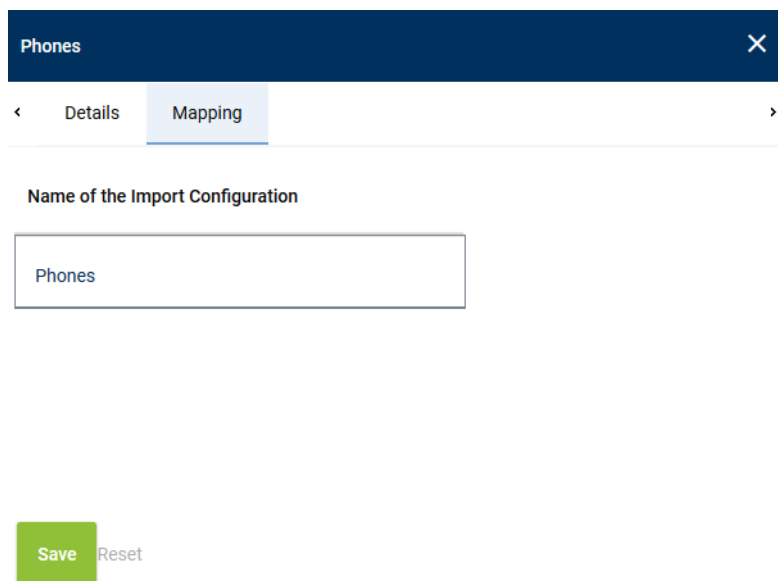


Fig. 17: Tab Mapping



As long as an XSLT mapping is used in an import configuration, you can neither delete or edit it.

6

Configuration Import module

In the Configuration Import module, you can create import jobs to import the configuration data once or on a regular basis.

1. In the application System Configuration, select the menu item *More > Configuration Import* in the navigation bar.

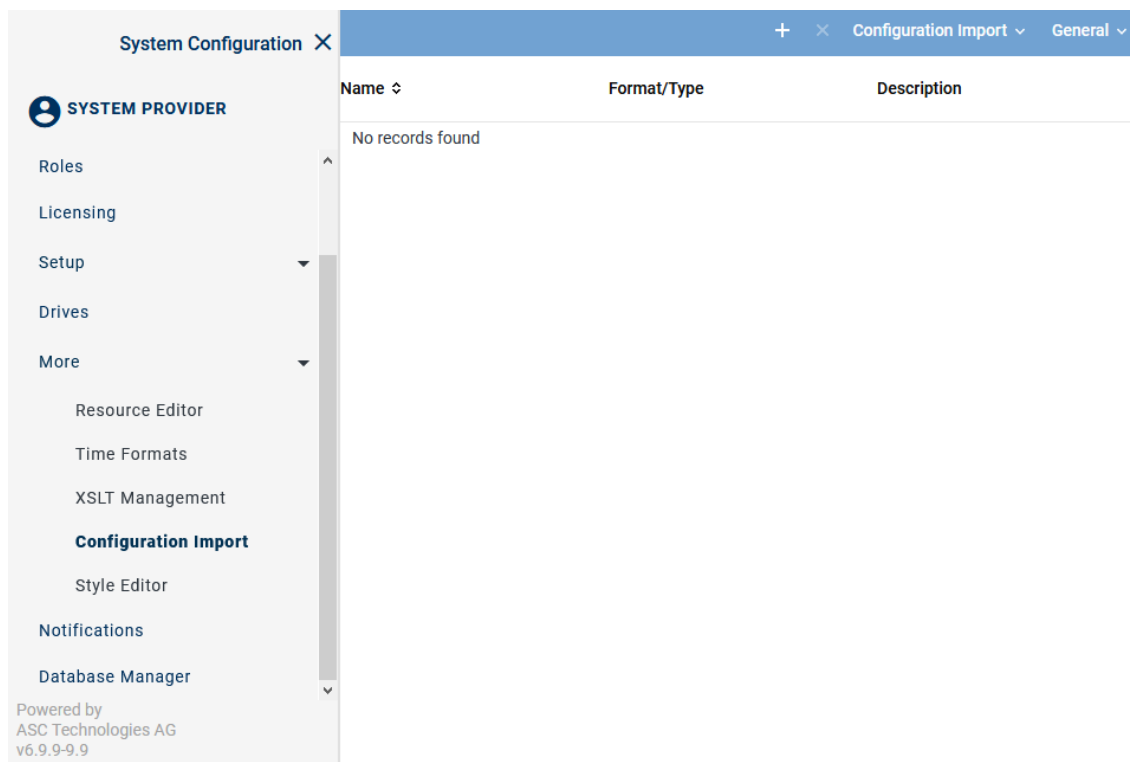


Fig. 18: Configuration import - main view

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



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

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

+ × Configuration Import ▾ General ▾		
Name	Format/Type	Description
▾ XML Import	IN_XML_FILE	
Unify Phones	PHONE	
▾ CSV Import	IN_CSV_FILE	
Cisco Phones	PHONE	

Fig. 19: Configuration import - possibilities for the phone configuration import





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.

6.1 Toolbar Configuration Import model

The toolbar offers the following functions.



Fig. 20: Configuration import - toolbar


	<i>Create</i>	Create a new element. The following possibilities are available: <ul style="list-style-type: none"> • CSV • XML • SFTP for Recording Check feature • External database for Recording Check feature
	<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.

6.2 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 anymore later on.

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


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

Fig. 21: Create import source

The following import formats are available for the import of phones:

- **XML**
For these import sources, the drive from which you would like to import the configuration data must have been configured in the recording system. The drive is set up by your system provider. If no appropriate drive is available, contact your system provider.
- **CSV**
For these import sources, the drive from which you would like to import the configuration data must have been configured in the recording system. The drive is set up by your system provider. If no appropriate drive is available, contact your system provider.

6.2.1 Import source for CSV import

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

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

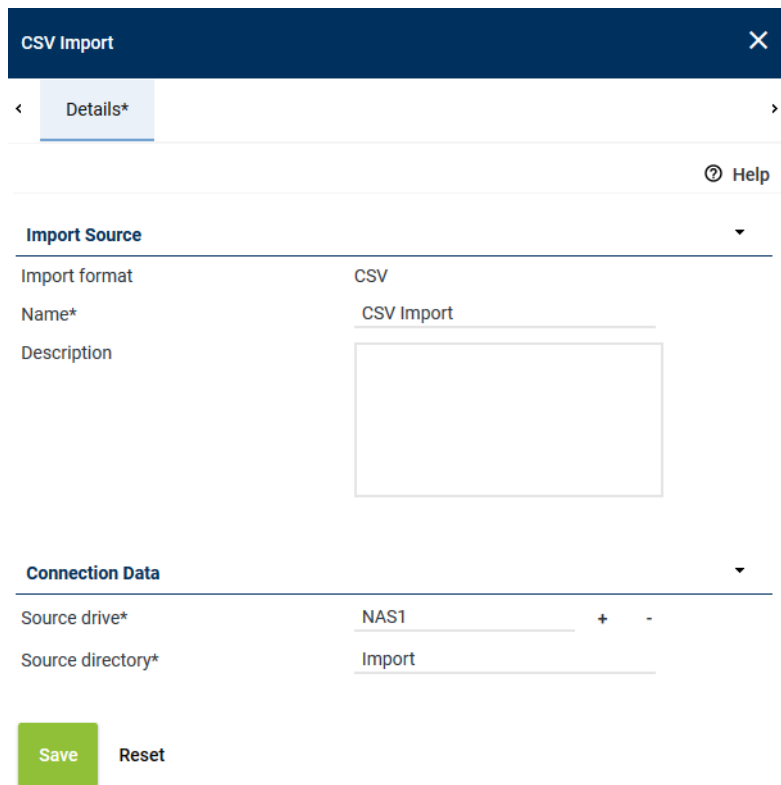


Fig. 22: Detail view Configure import source for CSV

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 [CSV](#) 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 chapter "Assign drive", p. 24 .
<i>Source directory</i>	Enter the directory where the file for the import is located.

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

6.2.2 Create import source for XML import

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

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

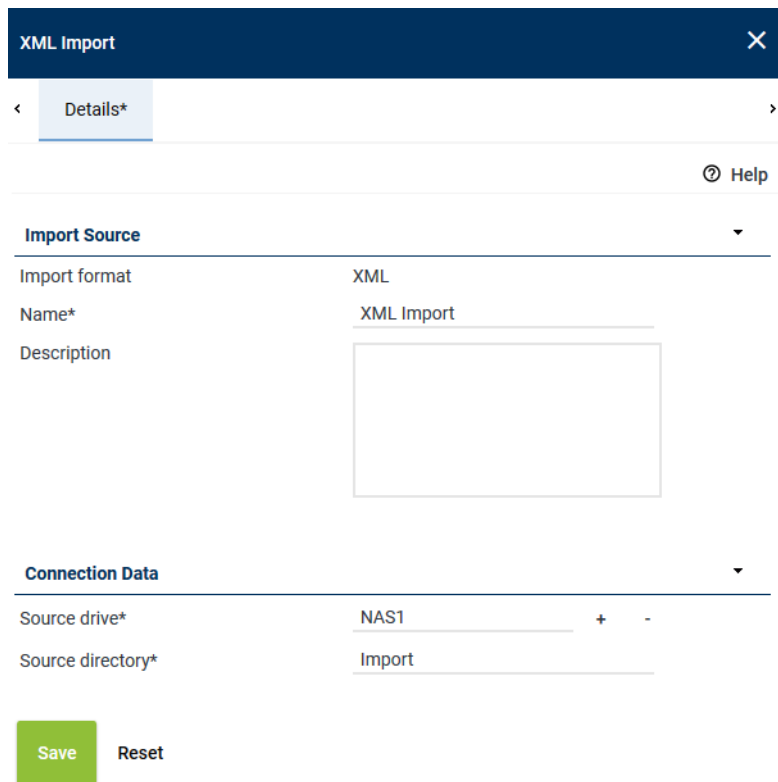


Fig. 23: Detail view Configure import source for XML

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

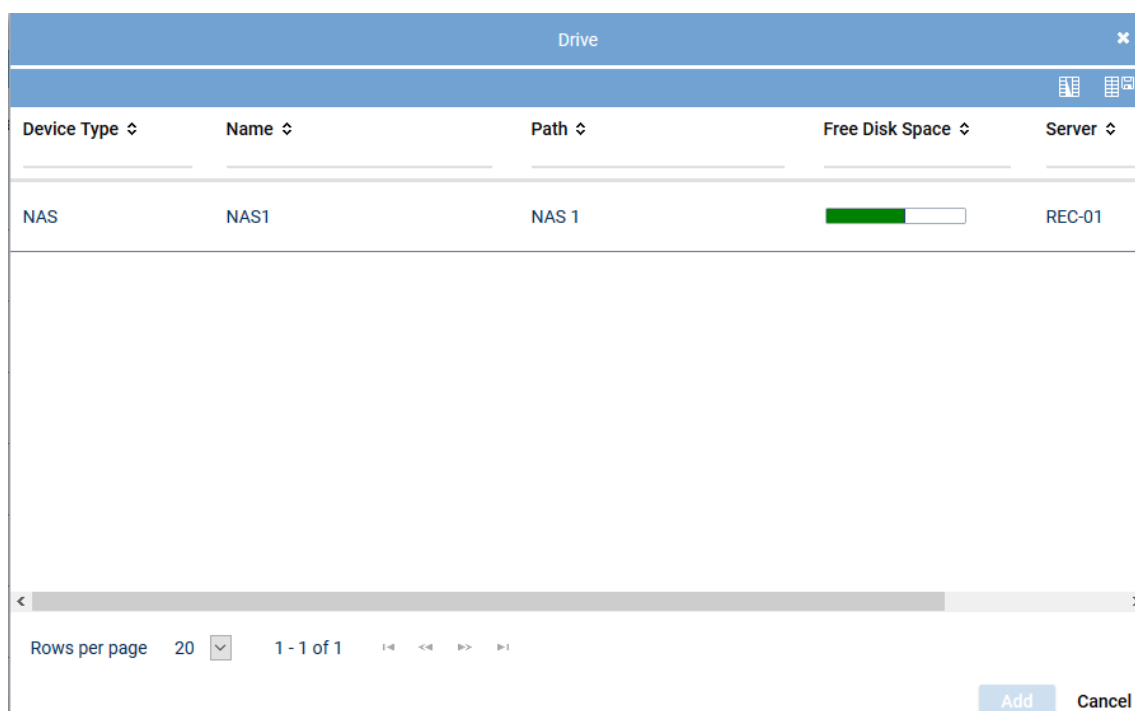
For an [XML](#) import, a drive must have been configured so that you can access it from here as source. **NOTICE!** The drive is set up by your system provider.

<i>Source drive</i>	Enter the drive where the directory with the file for the import is located, see chapter "Assign drive", p. 24 .
<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.

6.2.3 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
NAS	NAS1	NAS 1	<div style="width: 100%; height: 10px; background-color: green;"></div>	REC-01

Rows per page: 20 | 1 - 1 of 1 | < << >> >

Add **Cancel**

Fig. 24: Add drive

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

6.3 Create import job

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.

6.3.1 Import job for CSV import

6.3.1.1 Tab Details

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

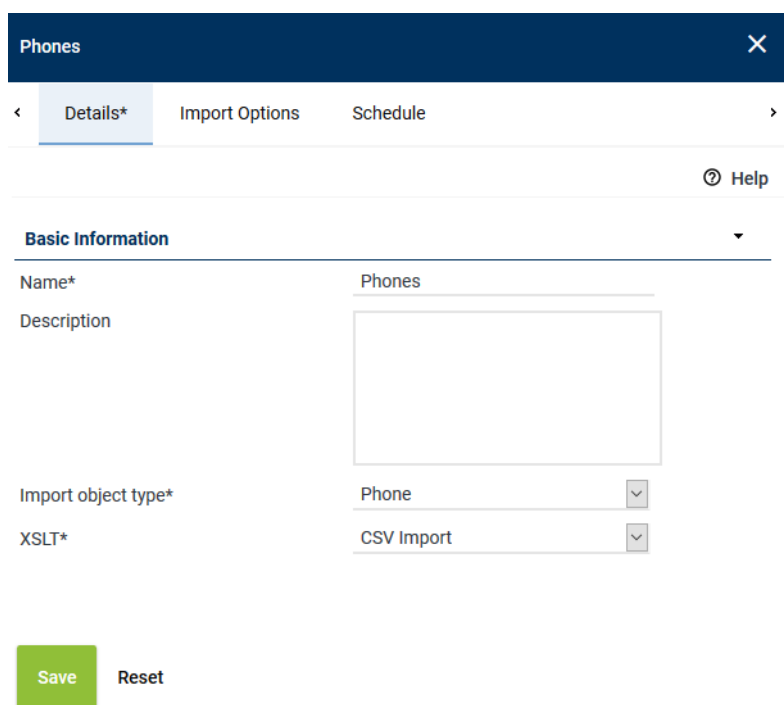


Fig. 25: Import configuration - tab Details for **CSV** import

<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>Phone</i> from the drop-down list.
<i>XSLT</i>	From the drop-down list, select the XSLT mapping file that you have created previously in the XSLT Management module module.

6.3.1.2 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.

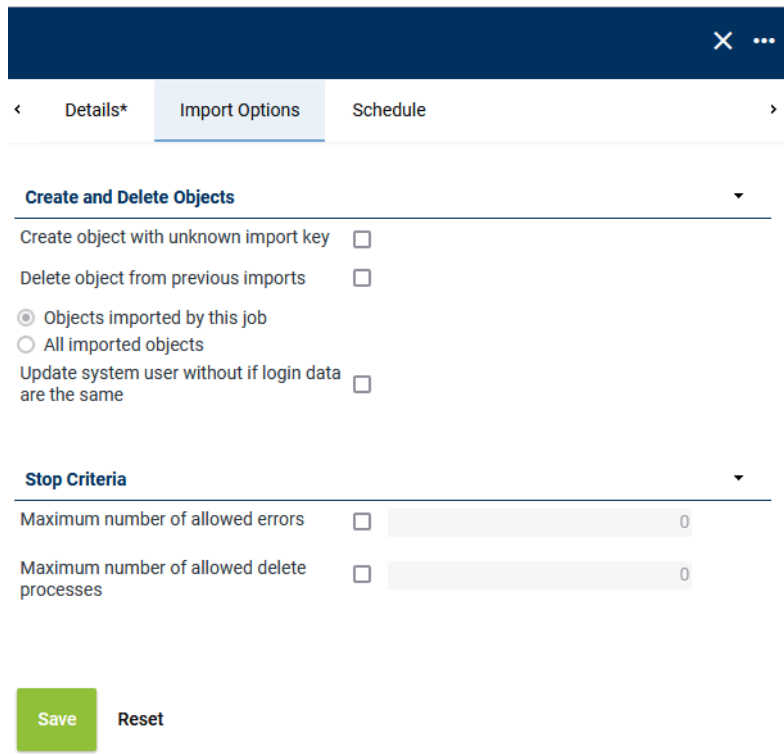


Fig. 26: Import configuration - tab Import Options

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>NOTICE! In the event of an error during the import, the function is deactivated automatically, i. e. no sets of data are deleted.</p> <p>NOTICE! 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 PBX, 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.

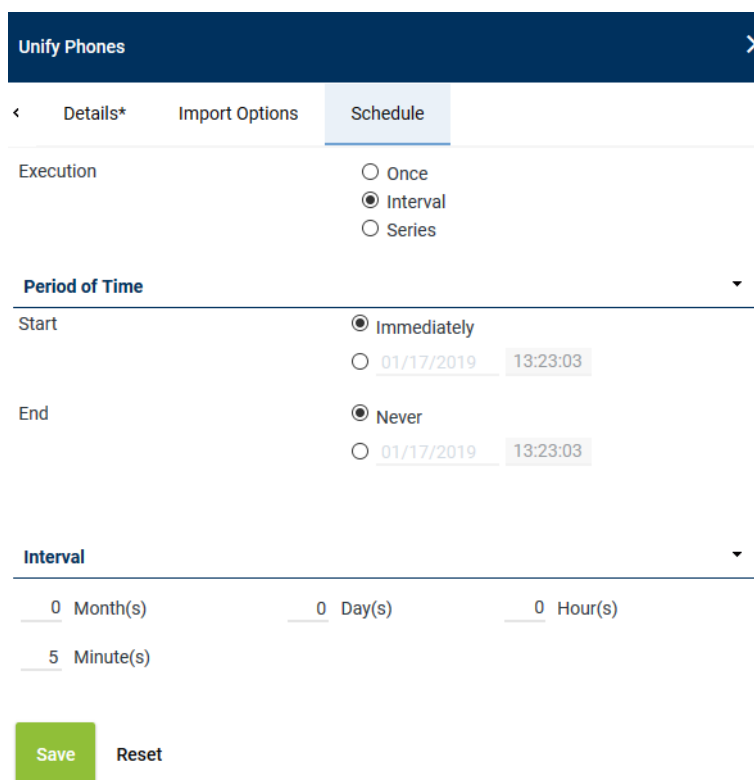
If the option *Delete objects from previous imports* has been selected in the group field *Create and Delete Objects*, then this option here allows selecting the maximum number of data sets which can be deleted before the deletion process is canceled. If the entered number is exceeded, no data sets are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

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

☐ = Deletion process is not canceled.

6.3.1.3 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. 27: 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.

6.3.1.3.1 Group field Period of Time

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

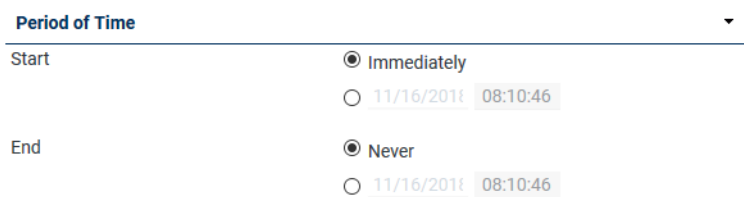




Fig. 28: Schedule - Period of Time

Start	<ul style="list-style-type: none"> • <i>Immediately</i> The job is started immediately. • <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 .
End	<ul style="list-style-type: none"> • <i>Never</i> The job never ends. • <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 .

6.3.1.3.2 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.

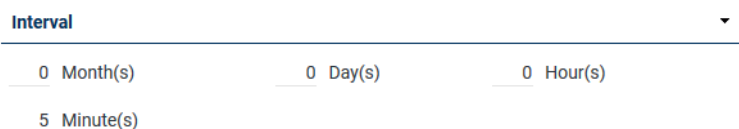


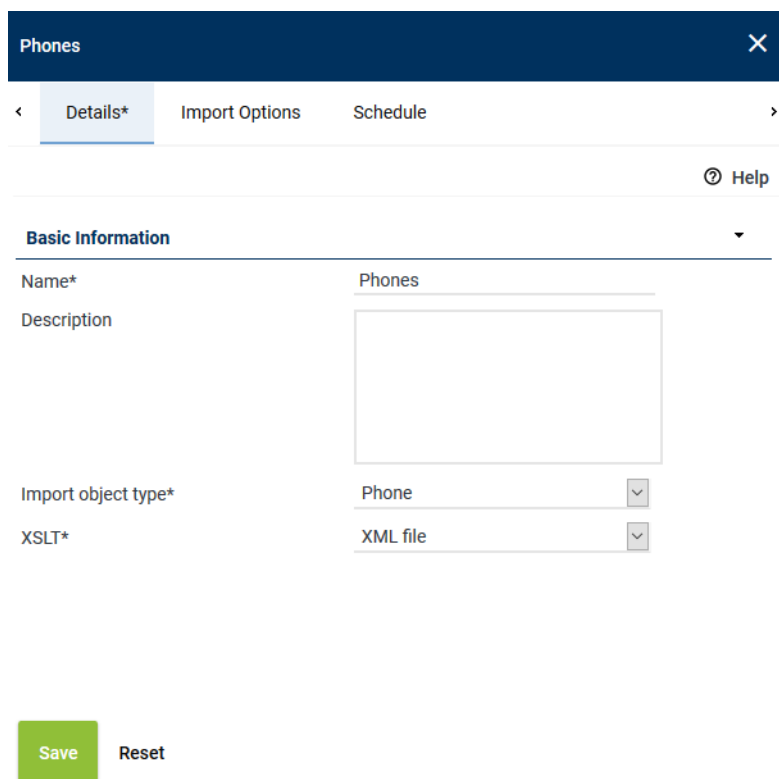
Fig. 29: Schedule - Interval

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

6.3.2 Create import job for XML import

6.3.2.1 Tab Details

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



The screenshot shows a web interface for configuring an XML import for phones. At the top is a dark blue header bar with the title 'Phones' and a close button (X). Below the header is a tabbed interface with three tabs: 'Details*' (selected), 'Import Options', and 'Schedule'. To the right of the tabs is a 'Help' icon and label. Under the 'Details*' tab, there is a section titled 'Basic Information' with a dropdown arrow. Below this section are four input fields: 'Name*' with the value 'Phones', 'Description' with an empty text area, 'Import object type*' with a dropdown menu showing 'Phone', and 'XSLT*' with a dropdown menu showing 'XML file'. At the bottom left of the form are two buttons: a green 'Save' button and a grey 'Reset' button.

Fig. 30: Import configuration - tab Details for XML import

<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>Phone</i> from the drop-down list.
<i>XSLT</i>	From the drop-down list, select the XSLT mapping file that you have created previously in the XSLT Management module module.

6.3.2.2 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.

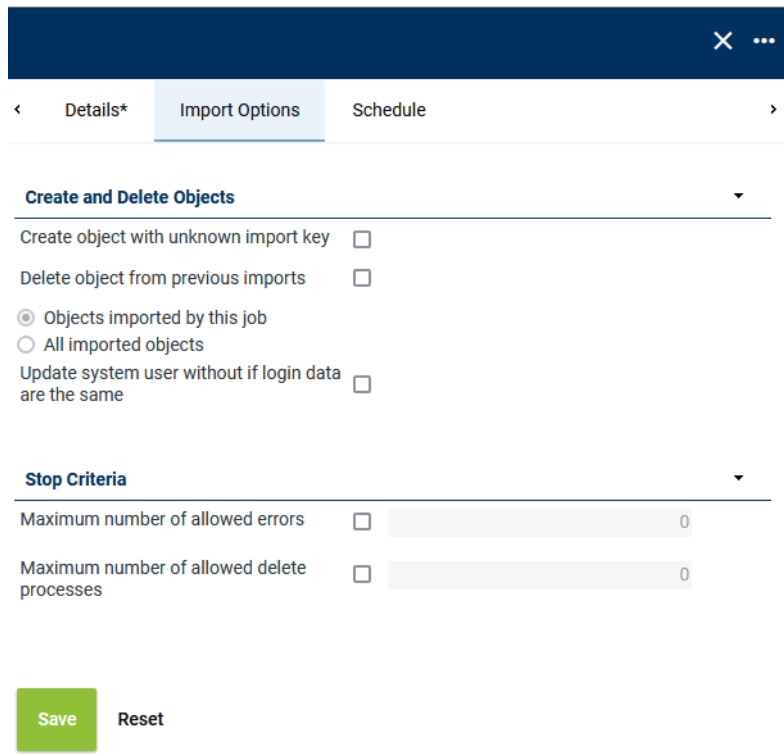


Fig. 31: Import configuration - tab Import Options

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>NOTICE! In the event of an error during the import, the function is deactivated automatically, i. e. no sets of data are deleted.</p> <p>NOTICE! 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 PBX, 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.

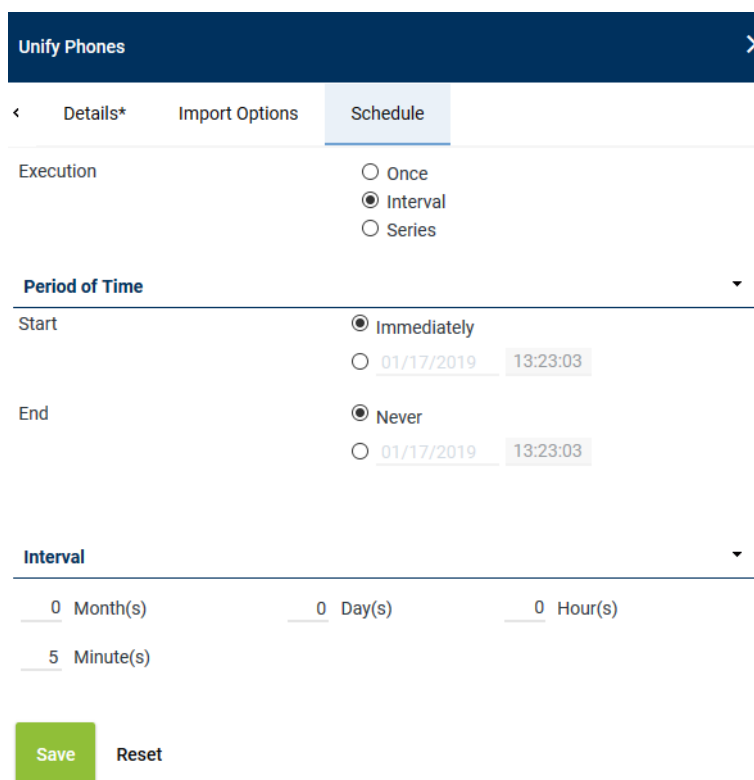
If the option *Delete objects from previous imports* has been selected in the group field *Create and Delete Objects*, then this option here allows selecting the maximum number of data sets which can be deleted before the deletion process is canceled. If the entered number is exceeded, no data sets are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

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

☐ = Deletion process is not canceled.

6.3.2.3 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. 32: 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.

6.3.2.3.1 Group field Period of Time

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

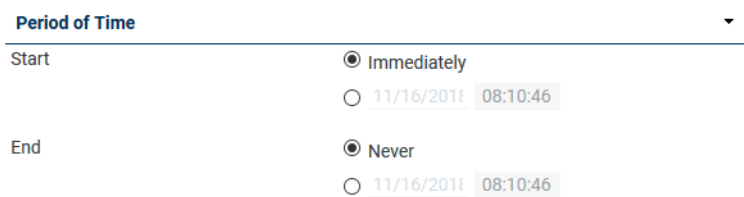




Fig. 33: Schedule - Period of Time

Start	<ul style="list-style-type: none"> • <i>Immediately</i> The job is started immediately. • <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 .
End	<ul style="list-style-type: none"> • <i>Never</i> The job never ends. • <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 .

6.3.2.3.2 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.

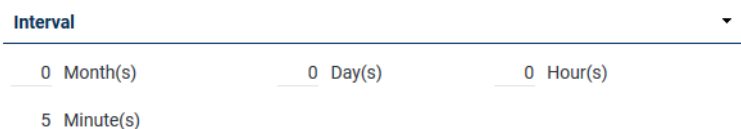


Fig. 34: Schedule - Interval

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

6.4 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 you change a job configuration while the job is active, the job is completed according to the previous configuration.



Information about the status of a job can be found in the application System Monitoring, see user manual *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 within 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.

6.5 Start and stop import job

Every import job is automatically started at the point in time defined in the schedule, see [chapter "Tab Schedule", p. 28](#).

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. In the main view below the import source, select the import job.
2. Select the menu item *Configuration Import*.
3. Select the menu item *Start Job* in the context menu.

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.

6.6 Check results

You can check the result of an import job in the application *System Monitoring* in the Jobs module.

1. Log in to the application *System Monitoring* as system administrator.
2. Select the menu item *Jobs* in the navigation bar.
3. In the list of messages, search for the entry of the respective import.

4. Information about the configured job appears in the tab *Details*.
5. The tab *Executions* displays the entries of the latest executions.
6. Click on the icon  (*History*) in the headline.
 - ⇒ A window opens displaying the information whether the execution was successful.



For information about the Jobs module refer to the user manual for administrators *Usage System Monitoring*.

In the Phones module, you can import phone configurations manually, if you have not created a job in the Configuration Import module for that.

1. Select the menu item *Setup > Phones* to import a phone configuration in this module.

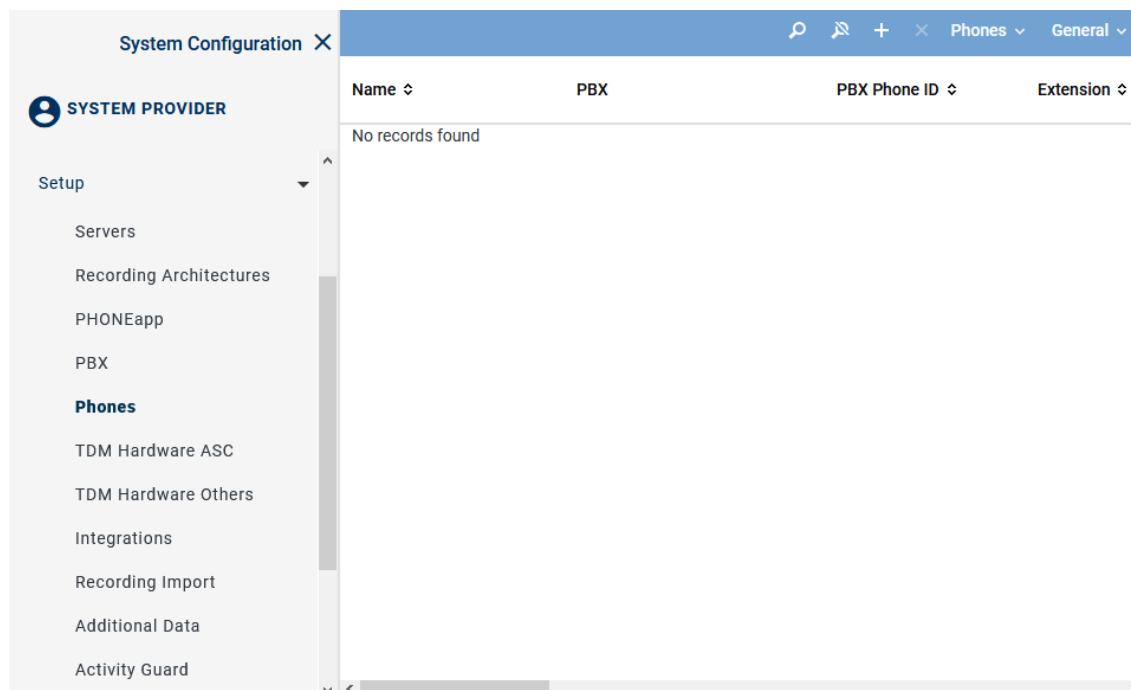


Fig. 35: Phones module - main view

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

<i>Name</i>	Shows the name of the phone.
<i>PBX</i>	Shows the name of the PBX.
<i>PBX Phone ID</i>	Shows the identifier which has been configured for the phone in the PBX.
<i>Extension</i>	Shows the assigned extension of the phone.
<i>Computer Name</i>	Shows the computer name if it has been defined in the details.
<i>Phone Type</i>	Shows the selected phone type if the PHONE <u>app</u> configuration has been activated.
<i>Display Language</i>	Shows the selected display language.

7.1






Toolbar of the Phones module

The toolbar offers the following functions:



Fig. 36: Toolbar

+	Create	Creates a new phone. Available are: <ul style="list-style-type: none"> • IP phone • TDM phone
----------	---------------	---

	<i>Search</i>	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see Search.
		The icon  is displayed whenever the search has been adjusted by means of a filter.
	<i>Reset search</i>	Resets all search filters so that the main view displays all data sets again.
	<i>Delete</i>	Deletes the selected phone upon confirming the security prompt.
<i>Phones</i>	<i>Import</i>	Opens a window in which you can select an XSLT file to be imported.
	<i>Edit</i>	Allows multiple editing of existing phones.
<i>General</i>	<i>Print</i>	Opens a list of existing phones along with the option to print it.
	<i>Adjust Table</i>	Opens a window where you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page
	<i>Save Table Configuration</i>	Saves the current table configuration of the main view as the default view of the user.
	<i>General Help</i>	Opens the online help.
	<i>Module Help</i>	Opens the module-specific online help.

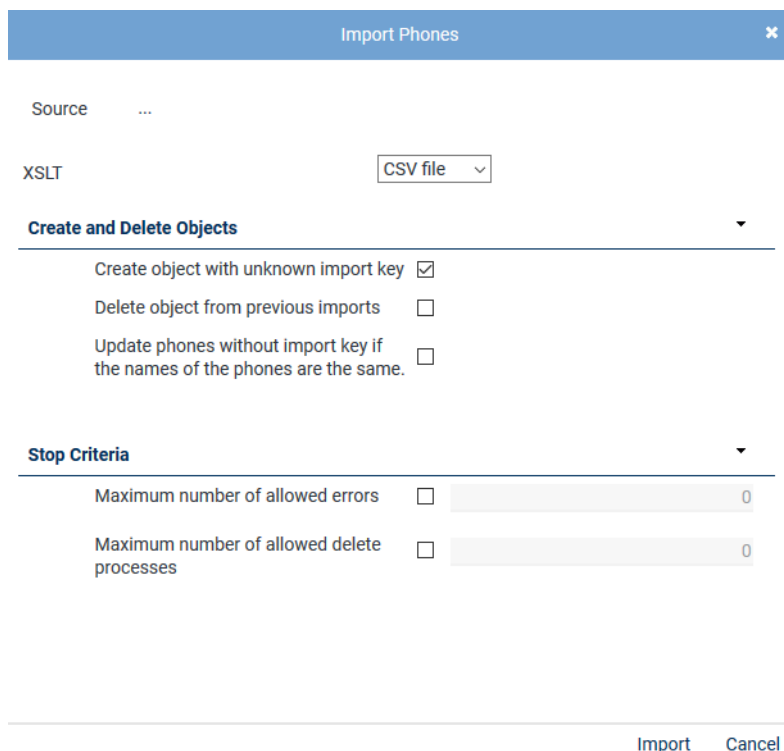


For detailed descriptions of the default functions such as *Search*, *Print*, *Adjust table* or *Help* refer to the user manual for system providers *General information - System Configuration*.

7.2

Import phones with CSV file

- ✓ An XSLT file must be available in the XSLT Management module for the format of the data to be imported. The following example describes how to import a file in CSV format.
- 1. In the toolbar of the main view, select the menu item *Phones*.
- 2. Select the menu item *Import* from the context menu.
 - ⇒ The window *Import Phones* appears.



Import Phones

Source ...

XSLT CSV file

Create and Delete Objects

Create object with unknown import key ☒

Delete object from previous imports ☐

Update phones without import key if the names of the phones are the same. ☐

Stop Criteria

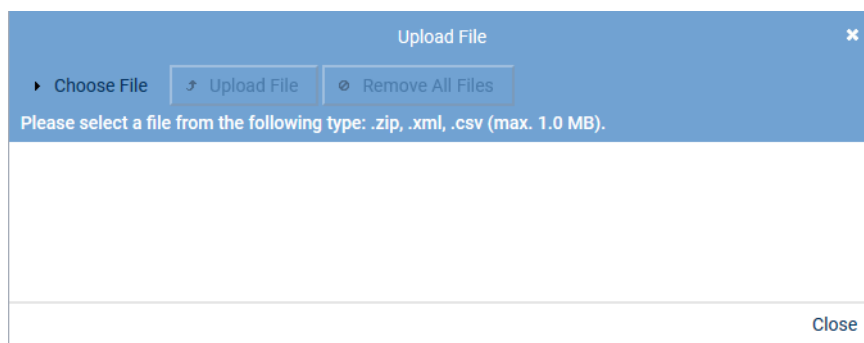
Maximum number of allowed errors ☐ 0

Maximum number of allowed delete processes ☐ 0

Import Cancel

Fig. 37: Phones module - import phones

3. Click on the button ... behind the field *Source* to select the source file for the import.
⇒ The window *Upload File* appears.
4. Select the CSV file with the content of the phone configuration for this import.
5. Click on the button *Choose File* to select the import file from the Windows Explorer.



Upload File

Choose File Upload File Remove All Files

Please select a file from the following type: .zip, .xml, .csv (max. 1.0 MB).

Close

Fig. 38: Choose file

- ⇒ The Windows Explorer opens.
6. Select the respective file via the Explorer and click on the button *Open*.

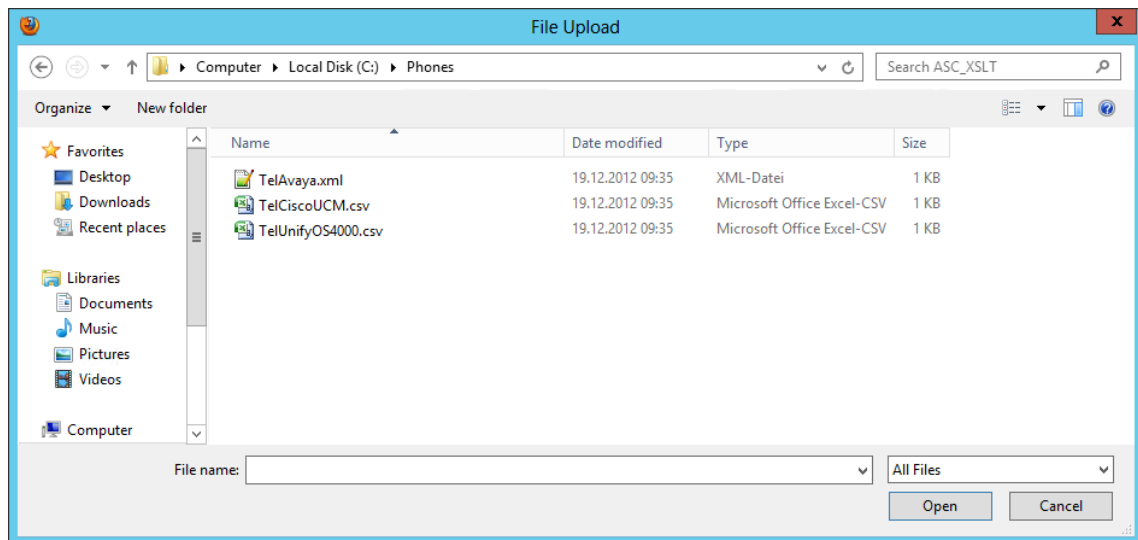



Fig. 39: Choose file

⇒ The selected file appears in the upload window. You can select several files to be uploaded.

7. To remove a selected file from the list, click on the icon  next to the selected file. To remove all selected files, click on the button *Remove All Files*.

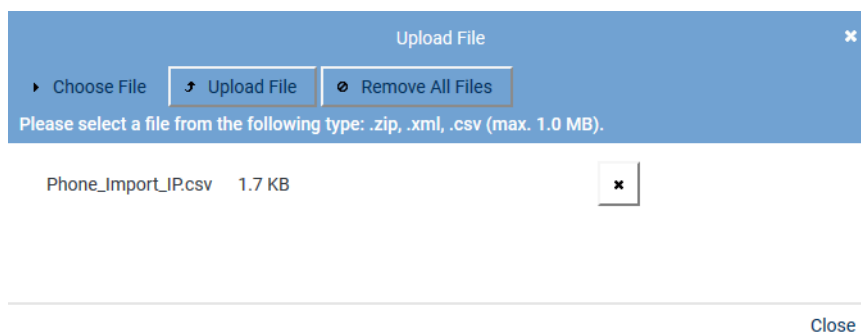


Fig. 40: Upload File

8. To upload the selected file, click on the button *Upload File*.
⇒ The window is closed and the file is displayed in the field *Source*.
9. In the drop-down list *XSLT*, select the XSLT mapping you would like to use for the import. Merely the structure from this XSLT file is employed to map the content correctly. In the drop-down list *XSLT*, all XSLT mappings matching the file format are displayed.

Group field Create and Delete Objects

1. Define the criteria according to which the objects are supposed to be created and deleted.

<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>NOTICE! In the event of an error during the import, the function is deactivated automatically, i. e. no sets of data are deleted.</p> <p>NOTICE! 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

1. Define the stop criteria for the import

<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 PBX, not being able to find a role or organization unit or a user missing essentially required attributes.</p> <p><input checked="" type="checkbox"/> = Import job is canceled when the number of errors entered here is exceeded.</p> <p><input type="checkbox"/> = Import job is not canceled.</p>
<i>Maximum number of allowed delete processes</i>	<p>Select whether the deletion process is supposed to be canceled if automatic deletion processes occurs.</p> <p>If the option <i>Delete objects from previous imports</i> has been selected in the group field <i>Create and Delete Objects</i>, then this option here allows selecting the maximum number of data sets which can be deleted before the deletion process is canceled. If the entered number is exceeded, no data sets are deleted.</p> <p><input checked="" type="checkbox"/> = Deletion process is canceled when the number of deletion processes entered here is exceeded.</p> <p><input type="checkbox"/> = Deletion process is not canceled.</p>

2. Click on the button *Import*.
 - ⇒ The data from the source file are imported into the recording system.
 - ⇒ The result of the import is displayed in a separate window.
3. Click on the button *Close* to close the window with the results and finish the import.
 - ⇒ The imported phone configurations are displayed in the main view.

+ × Phones ▾ General ▾			
Name ▾	PBX ▾	PBX Phone ID ▾	Extension ▾
6001	PBX		6001
6002	PBX		6002

Fig. 41: Main view - Phones imported successfully

7.3 Import phones with XML file

- ✓ An XSLT file must be available in the XSLT Management module for the format of the data to be imported. The following example describes how to import a file in XML format.
1. In the toolbar of the main view, select the menu item *Phones*.
 2. Select the menu item *Import* from the context menu.
 - ⇒ The window *Import Phones* appears.

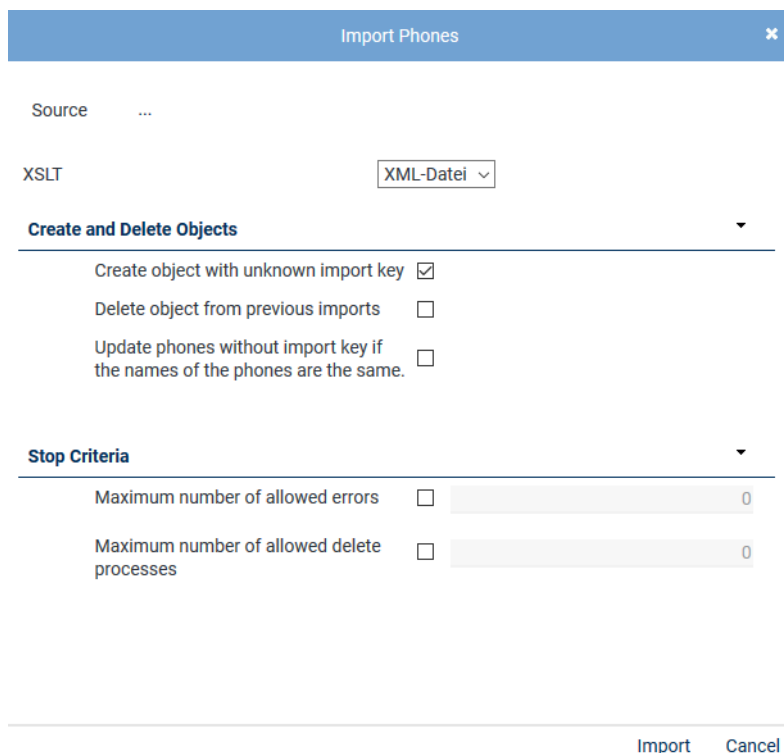



Fig. 42: Phones module - import phones

3. Click on the button  behind the field *Source* to select the source file for the import.
⇒ The window *Upload File* appears.
4. Select the XML file with the content of the phone configuration for this import.
5. Click on the button *Choose File* to select the import file from the Windows Explorer.

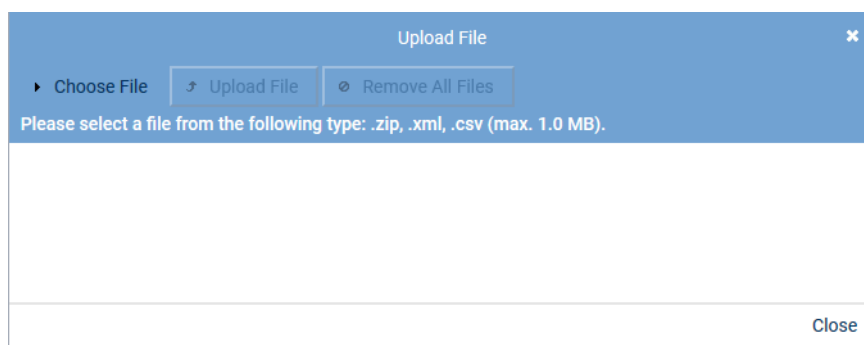


Fig. 43: Choose file

- ⇒ The Windows Explorer opens.
6. Select the respective file via the Explorer and click on the button *Open*.

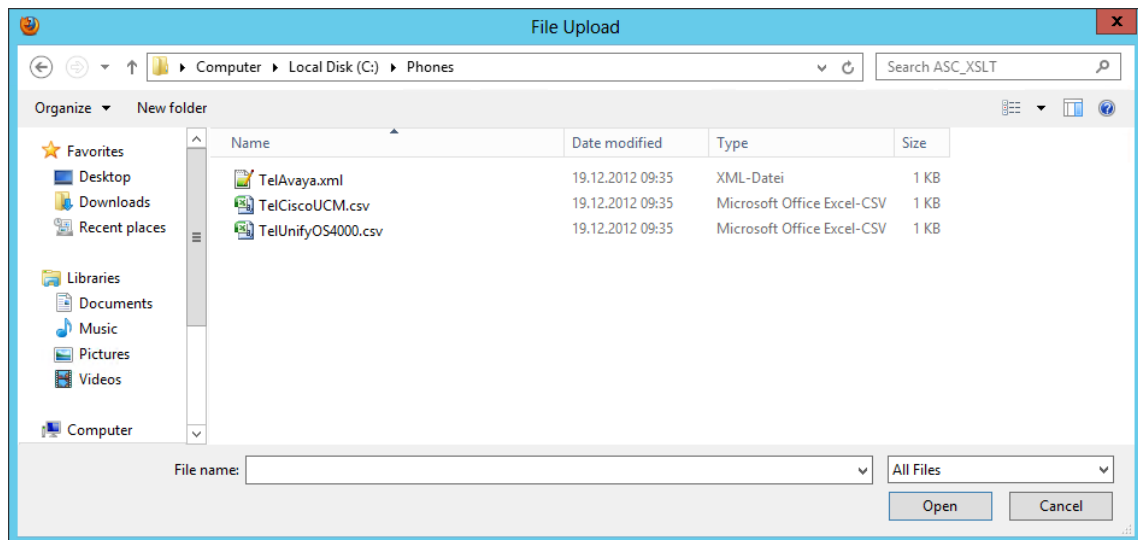



Fig. 44: Choose file

⇒ The selected file appears in the upload window. You can select several files to be uploaded.

7. To remove a selected file from the list, click on the icon  next to the selected file. To remove all selected files, click on the button *Remove All Files*.

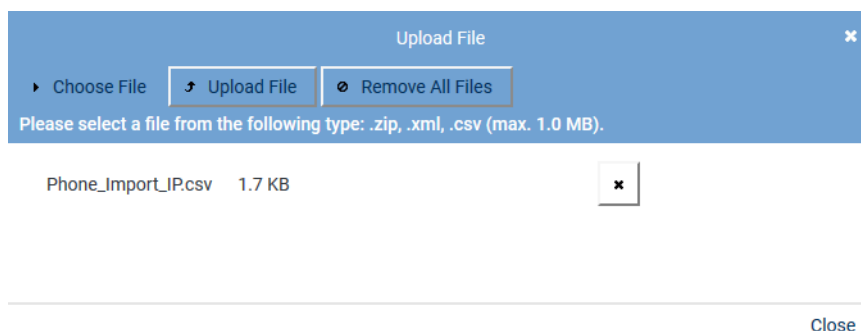


Fig. 45: Upload File

8. To upload the selected file, click on the button *Upload File*.
⇒ The window is closed and the file is displayed in the field *Source*.
9. In the drop-down list *XSLT*, select the XSLT mapping you would like to use for the import. Merely the structure from this XSLT file is employed to map the content correctly. In the drop-down list *XSLT*, all XSLT mappings matching the file format are displayed.

Group field Create and Delete Objects

1. Define the criteria according to which the objects are supposed to be created and deleted.

<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>NOTICE! In the event of an error during the import, the function is deactivated automatically, i. e. no sets of data are deleted.</p> <p>NOTICE! 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

1. Define the stop criteria for the import

<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 PBX, not being able to find a role or organization unit or a user missing essentially required attributes.</p> <p><input checked="" type="checkbox"/> = Import job is canceled when the number of errors entered here is exceeded.</p> <p><input type="checkbox"/> = Import job is not canceled.</p>
<i>Maximum number of allowed delete processes</i>	<p>Select whether the deletion process is supposed to be canceled if automatic deletion processes occurs.</p> <p>If the option <i>Delete objects from previous imports</i> has been selected in the group field <i>Create and Delete Objects</i>, then this option here allows selecting the maximum number of data sets which can be deleted before the deletion process is canceled. If the entered number is exceeded, no data sets are deleted.</p> <p><input checked="" type="checkbox"/> = Deletion process is canceled when the number of deletion processes entered here is exceeded.</p> <p><input type="checkbox"/> = Deletion process is not canceled.</p>

2. Click on the button *Import*.
 - ⇒ The data from the source file are imported into the recording system.
 - ⇒ The result of the import is displayed in a separate window.
3. Click on the button *Close* to close the window with the results and finish the import.
 - ⇒ The imported phone configurations are displayed in the main view.

+ × Phones ▾ General ▾			
Name ⇅	PBX ⇅	PBX Phone ID ⇅	Extension ⇅
6001	PBX		6001
6002	PBX		6002

Fig. 46: Main view - Phones imported successfully

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Glossary

CSV

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

PBX

Private Branch Exchange

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.