

System Configuration

Additional Data module



Administration manual

for system providers

5/31/2022

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)

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1 General information

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2 Introduction

Additional data

Metadata for a conversation delivered by a communication platform are added to the respective conversation as additional data in the recording system.

The recording system differentiates between 2 types of additional data:

- *Default additional data fields*
This additional data cannot be changed such as the start time, the end time, and the phone number of the participants or the agent data.
- *CustomCP fields*
These fields can be adjusted by the user and can be configured as editable fields. Among those are e. g. comment fields or customer IDs. The configuration takes place in the Additional Data module of the application System Configuration.

In the Additional Data module, you can assign metadata to CustomCP fields in Neo so that the data is tagged and saved there.

The information tagged in CustomCP fields can also be used in the Recording Planner for instance to control recording behavior and displayed in the search and replay applications.



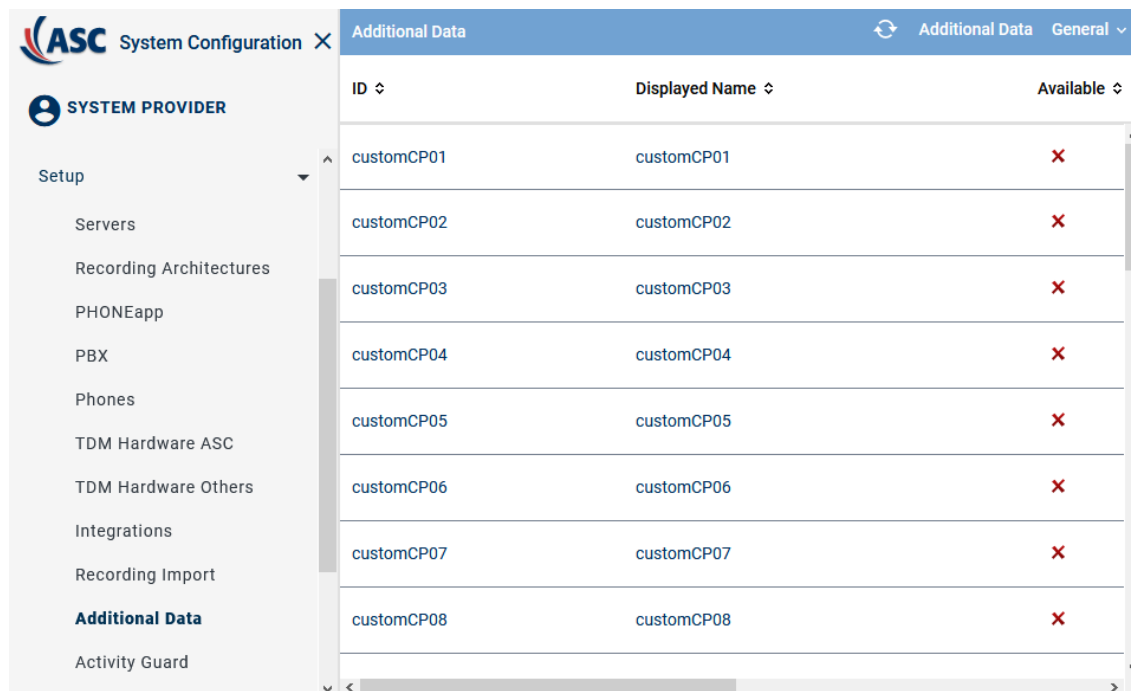
Basic information about using the application System Configuration can be found in the user manual for administrators *System Configuration - General information*.

3

Main view

1. Open the application System Configuration.
2. Log in as system administrator to configure the additional data.
3. Select the menu item *Setup > Additional Data* in the navigation bar.

In the main view, all parameters for the additional data are displayed. The table contains a set of 30 predefined fields which can be configured.



ID	Displayed Name	Available
customCP01	customCP01	X
customCP02	customCP02	X
customCP03	customCP03	X
customCP04	customCP04	X
customCP05	customCP05	X
customCP06	customCP06	X
customCP07	customCP07	X
customCP08	customCP08	X

Fig. 1: Additional Data - main view

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

<i>ID</i>	The ID clearly identifies this additional data type and cannot be changed.
<i>Displayed Name</i>	The displayed name appears in the configuration of the additional data in the CTI connection data of the integration, for instance. The name serves as search parameter or as criterion in the Recording Planner, too.
<i>Available</i>	Shows whether this additional data type is displayed in the system, e. g. in the configuration of the additional data in the CTI connection data in the integration.
<i>Editable</i>	Shows whether the user may edit the content of the additional data type.
<i>External Recording Control</i>	Shows whether the information can be edited via the external recording control, such as <u>CLIENT</u> <i>command</i> . This option becomes active upon activating the option <i>Editable</i> .
<i>Updated</i>	This date is updated with every new change.

3.1

Toolbar

The toolbar offers the following functions.

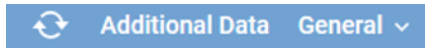



Fig. 2: Toolbar

	<i>Refresh</i>	Refreshes the main view.
General	<i>Adjust table</i>	<p>Opens a window in which you can adjust the following settings for the main view:</p> <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page
	<i>General Help</i>	By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened.
	Module Help	By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened.



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

4

Detail view

The detail view displays the information you can configure.

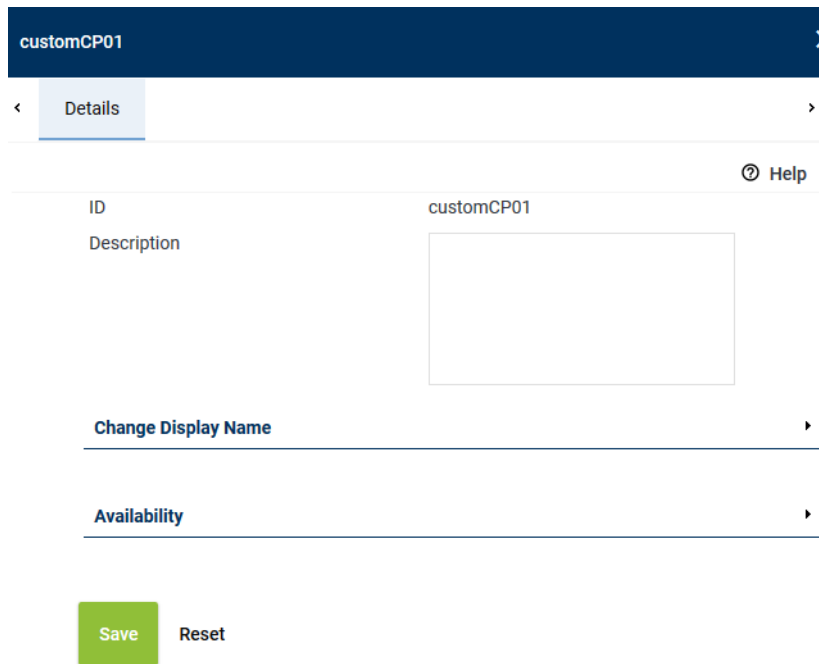


Fig. 3: Additional Data - detail view

- *ID*

The ID is an internal identification which cannot be changed.

- *Description*

You can enter any necessary information in the entry field to clarify the meaning of the additional data type.

The detail view consists of another 2 group fields:

- *Change Display Name*

Here, you can change the name of the additional data type the way it is supposed to be displayed in the system.

See [chapter "Change Display Name", p. 8](#).

- *Availability*

Here, you can configure which functions are supposed to be available for the additional data type in the system.

See [chapter "Availability", p. 10](#)

4.1

Change Display Name

In this group field, you can add a descriptive name for the field of the additional data type.

1. In the group field headline *Change Display Name*, click on the arrow ► to expand the group field.
 - ⇒ The entry mask for the different languages appears.










Change Display Name		
Language	Content	
ar_SA	customCP01	
bg_BG	customCP01	
de_DE	Universal Call ID	
en_GB	customCP01	
en_US	Universal Call ID	 

Fig. 4: Detail view - change display name

The following languages are available:

- ar_SA for Saudi-Arabian
 - bg_BG for Bulgarian
 - cs_CZ for Czech
 - de_DE for German
 - en_GB for British English
 - en_US for American English
 - es_ES for Spanish
 - et_EE for Estonian
 - fr_FR for French
 - it_IT for Italian
 - ja_JP for Japanese
 - nl_NL for Dutch
 - pl_PL for Polish
 - pt_BR for Brazilian Portuguese
 - pt_PT for Portuguese
 - ru_RU for Russian
 - zh_CN for Chinese
 - zh_TW for Taiwanese
2. Click on the icon  at the end of the line of the language you would like to change.
 3. Enter the name for the field of the additional data type in the editing mode.
 4. Click on the check mark  to finish the editing mode for this language.
 5. In the group field headline *Change Display Name*, click on the arrow  to collapse the group field.
 6. To save the settings, click on the button *Save*.
To discard the settings, click on the button *Reset*.

4.2

Availability

In this group field, you can configure whether the additional data type is supposed to be displayed elsewhere in the system, too, to be used there. This is relevant for instance for the configuration of the CTI connection data within the integration in order to have the delivered additional data displayed in POWERplay Web and in POWERplay Instant.

1. In the group field headline *Availability*, click on the arrow ▶ to expand the group field.

⇒ The following parameters appear:



Availability	
Available	<input checked="" type="checkbox"/>
Editable	<input checked="" type="checkbox"/>
External recording control	<input checked="" type="checkbox"/>

Save Reset

Fig. 5: Detail view - configure availability

<i>Available</i>	<p>Activate the check box if the additional data type is supposed to be available for assignment in the configuration of the additional data of the CTI connection data in the integration. The assignment enables you to display the additional data in the players.</p> <p><input checked="" type="checkbox"/> = Additional data type is displayed elsewhere in the system. <input type="checkbox"/> = Additional data type is not displayed elsewhere in the system.</p>
<i>Editable</i>	<p>Activate the check box to be able to edit the additional data type in the players.</p> <p><input checked="" type="checkbox"/> = Additional data type can be edited. <input type="checkbox"/> = Additional data type cannot be edited.</p>
<i>External Recording Control</i>	<p>Activate the check box to be able to edit the additional data type via the external recording control. This option is only available if you have activated the option <i>Editable</i>.</p> <p><input checked="" type="checkbox"/> = Additional data type can be edited via the external recording control. <input type="checkbox"/> = Additional data type cannot be edited via the external recording control.</p>



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

5 Assignment in the integration

As soon as the fields of the additional data have been configured, they can be assigned in the configuration of the integration to use the additional data.




It is not mandatory to assign customCP fields to an integration to have them filled and to be able to use them in the players.

1. In the navigation bar, select the menu item *Setup > Integrations*.
2. In the main view, click on the icon  in front of the name of the integration to display the configuration steps.
3. Click on the button  (*Edit configuration step*) in the line *Configure CTI connection data*.
⇒ In the detail view, the tab *Module 1* appears with the group fields *CTIconnect module*, *Connection Data* and *Additional Data*.

Additional Data

In this group field, you can assign the metadata delivered for a conversation with the protocol of the communication platform to the CustomCP fields in Neo so that they are available to be used elsewhere.

1. In the group field headline *Additional Data*, click on the arrow  to open the group field and assign the additional data to the data fields.


Additional Data			▼
universal_call_ID	Universal Call ID		▼
VDN_extension	Please select...		▼
VDN_name	Please select...		▼
flexible_billing	Please select...		▼
last_connected_device	Please select...		▼
trunk_group	Please select...		▼
trunk_member	Please select...		▼
userInfo_type	Please select...		▼
userInfo_data_value	Please select...		▼
distributingDevice_device_ID	Please select...		▼
originalCallInfo_userInfo_type	Please select...		▼
originalCallInfo_userInfo_data...	Please select...		▼
originalCallInfo_callingDevice...	Please select...		▼
originalCallInfo_calledDevice...	Please select...		▼
originalCallInfo_lookAheadInfo...	Please select...		▼

Fig. 6: Additional Data (example)

2. From the drop-down list, select the data field where the additional data is supposed to be displayed.



Arbitrary assignment

In the section *Arbitrary assignment*, you can configure the additional data which is additionally delivered by the PBX or by an add-on but which is not listed yet. Upon assigning the delivered additional data, it appears in the search and replay applications.

1. In the group field headline *Additional Data*, click on the arrow  to open the group field and assign the additional data to the data fields.

Arbitrary assignment			+
<input type="text"/>	Please select...	▼	⊖
<input type="text"/>	Please select...	▼	⊖
<input type="text"/>	Please select...	▼	⊖

Fig. 7: Arbitrary assignment of the additional data

- In the entry field on the left, enter the description of the additional data type from the protocol. Observe the same spelling as it is used in the protocol. The information which is read out of the protocol is displayed in the columns in the players.
- From the drop-down list, select the display name you have configured in the Additional Data module. Only those display names are displayed for which the option *Available* has been activated in the Additional Data module.
- To add a new assignment, click on the icon  (*Create*) in the toolbar of the table.
⇒ An additional row appears to assign another additional data type.
- To delete an assignment, click on the icon  in the respective row.
- Click on the button **Save** in the detail view to save the entries and finish this configuration step.

6

Activate additional data for employees

To enable employees to use additional data which has been assigned to an integration, it must be activated for usage for the employees by the system provider of the tenant in the Employees module in the tab *Individual Function Rights*.

1. Log in to the application System Configuration as 1st-tenant-admin and select the menu item *Employees* in the navigation bar.
2. In the main view, select the employee for whom you would like to activate the additional data.
3. In the detail view, select the tab *Individual Function Right* and open the group field *Additional Data*.

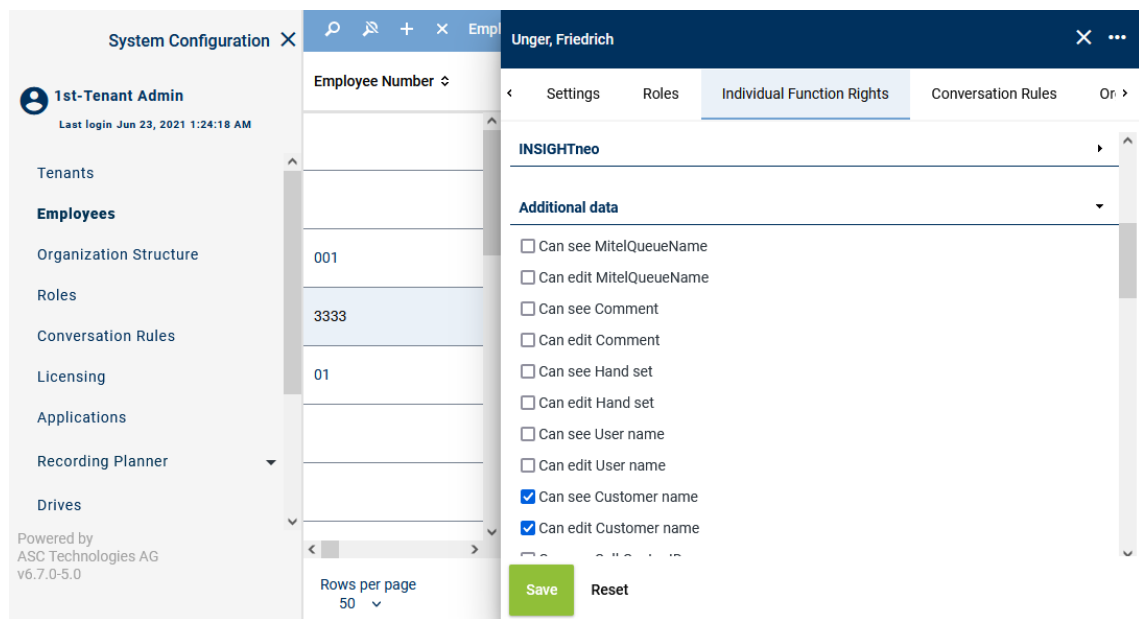


Fig. 8: Activate additional data for employee (example)

4. Activate the additional data which is supposed to be available to the employee.
5. Click on the button *Save* in the detail view to save the entries.



Only the tenant can check where the data is displayed. To do so, the tenant must log off from the replay application POWERplay Web and log in again.

Upon the next recording, the available additional data is released in POWERplay Web in the view *Conversation* in the detail view of the conversation in the tab *Additional Data*.

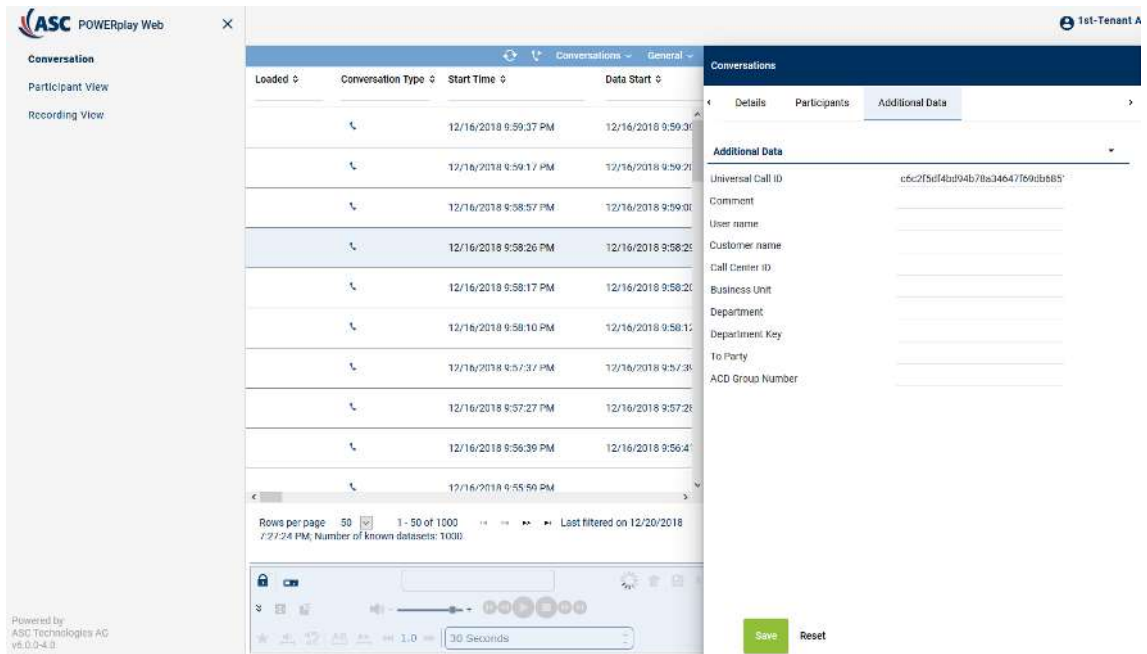


Fig. 9: Additional data in POWERplay Web



Additional data which is not delivered along with the protocol is not available for further use.

1. Here, you can edit the additional data for which you have activated the option *Editable* in the Additional Data module.
2. If you would like to make changes here, click on the button *Save* to apply them.



The display can only be checked by the tenant. The search and replay application POWERplay Pro must be restarted.

Upon the next recording, the available additional data is released in POWERplay Pro in the menu item *Conversation* in the detail view of the conversation in the tab *Additional Data*.

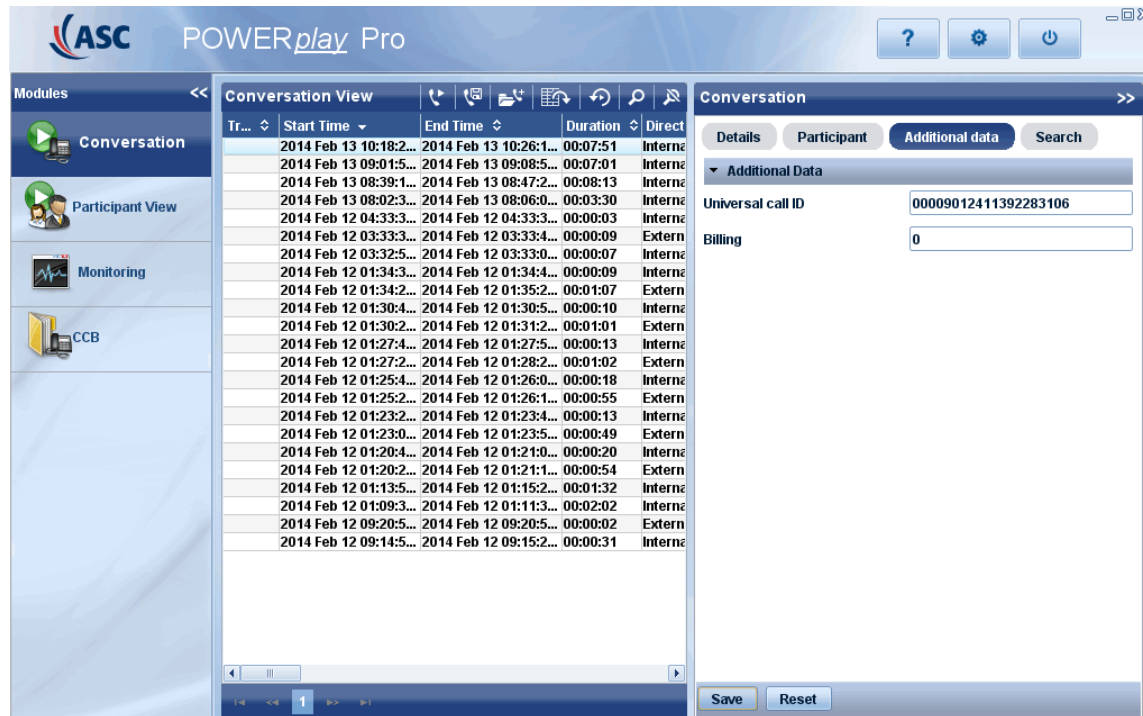


Fig. 10: Additional data in POWERplay Pro



Additional data which is not delivered along with the protocol is not available for further use.

1. Here, you can edit the additional data for which you have activated the option *Editable* in the Additional Data module.
2. If you would like to make changes here, click on the button *Save* to apply them.

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