

# Export and import from Neo to Neo



## Administration manual for system providers and tenants

6/1/2022

### Product line Neo, version 7.x

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

EVOIP<sup>neo</sup>

EVOLUTION<sup>neo</sup> / XXL / eco

EVO<sup>flex</sup> (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 document describes the preconditions and the procedure to transfer recordings from an ASC recording system version Neo to another ASC recording system version Neo in *neo* Conversation import format. To be able to import recordings in the ASC-proprietary format, the recordings must have been exported in the format *neo* Conversation, too.



For information about the export in WAVE format refer to the administration manual for tenants *Export of recordings*.



For information about the import in WAVE format refer to the administration manual for system providers *Import of recordings*.



For information about the import formats ASC legacy storage, ASC legacy integration, and ASC legacy archive medium refer to the administration manual *Migration* (for system providers and tenants).

The recordings have to be exported from the source system by the **tenant** to whom they belong, see [chapter "Export recordings from the source system", p. 9](#).

Subsequently, the **system provider** of the destination system has to import the exported data into the destination system, see [chapter "Import recordings into the destination system", p. 25](#).

In the destination system, the recordings are imported into the system storage and the corresponding meta data into the database. After the import, exclusively the tenant configured in the import configuration has access to the recordings in the destination system.



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Data can either be transmitted via a [NAS](#) drive or via an internal or external hard disk.

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Chat recordings cannot be imported.

Conversations which exclusively consist of meta data cannot be imported either.

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Data which has been encrypted with one of the following methods cannot be imported:

- Neo key management
  - vormetric key management
-

## 3

## Preconditions

- The software version of the source system must be version Neo 5.5 or higher
- The software version of the destination system must have the same or a higher version than the source system.
- The following license must be available in both systems: Interface for data import and export
- The function *Export* must have been activated in the source system.
- The function *Import* must have been activated in the destination system.



For information about the activation and administration of licenses refer to the administration manual for system providers *License administration*.



For information about the configuration of servers and recording architectures refer to the administration manual for system providers *Configuration servers and recording architectures*.



The import function works only on servers on which a Recording Control Service is running.

An import does not take place when switching to a server without a Recording Control Service in case of an error.

An import does not take place when switching to a server with a Recording Control Service but without a configured import function in case of an error.

- The drive types [NAS](#), Amazon S3, Azure Blob Storage, Google Cloud Storage as well as external and internal drives can be used as drive.
- For Recording Insights, only Azure Blob Storage is supported.
- In the source system, the drive must be assigned to the tenant exporting the data.
- On the target system, the drive must not be assigned to any tenant, so that it remains available to the system provider.
- For each tenant and for each export/import a separate drive must be used.



For information about the supported types of drives refer to the administration manual for system providers *Configuration drives*.



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



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

## Supported format for export and import

The Neo system provides the format neo Conversation for the export and import between Neo recording systems. When using this format, you do not risk losing any information.

Data which is exported with the format neo Conversation is exported with the ASC proprietary format and contains all metadata.

Data which is imported with the format neo Conversation is imported with the ASC proprietary format and can be mapped accordingly in the new system by means of the metadata.

You can import recording data which has been created by another Neo recording system, e. g. when merging 2 Neo recording systems.



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For a permanent transfer, you have to use the option of a data transfer which can be configured in the application System Configuration in the Servers module.

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For information about the configuration of servers and recording architectures refer to the administration manual for system providers *Configuration servers and recording architectures*.



## Export recordings from the source system

### Precondition for the export

- On the server that the recordings are supposed to be exported from, the function *Export* must have been activated, see administration manual *Configuration servers and recording architectures*.



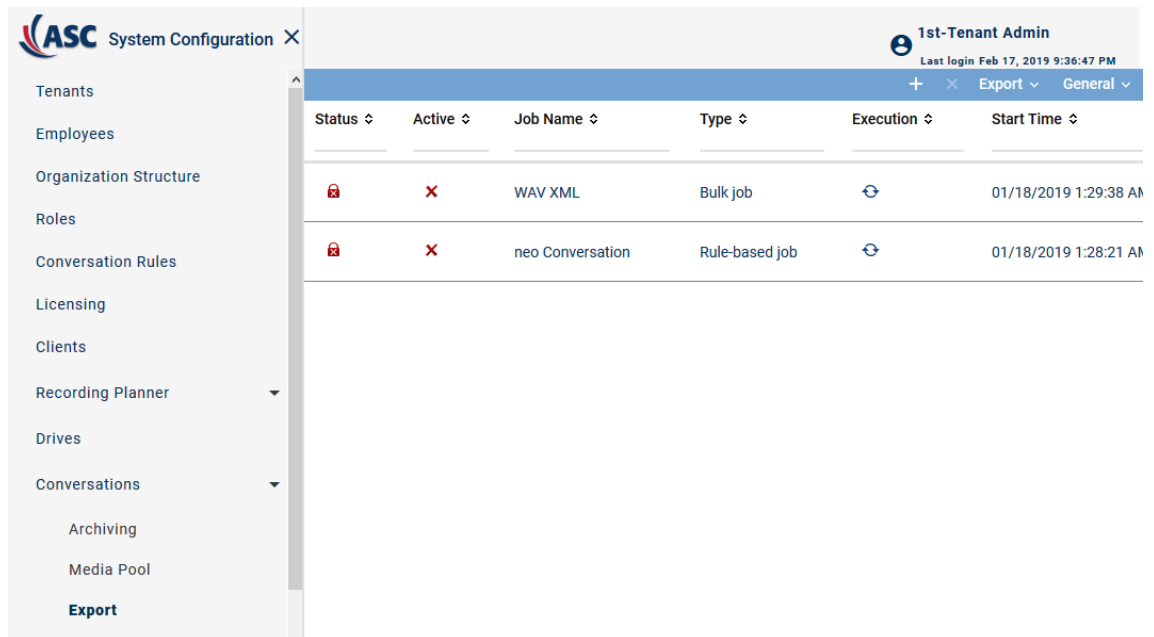
Basic information about using the application System Configuration can be found in the user manual for administrators *System Configuration - General information*.

To export the recordings from the source system, the tenant has to create and activate an export configuration in the Export module of the application System Configuration.




The tenant to whom the recordings belong has to export the recordings from the source system.

- Open the applicationSystem Configuration in the source system.
- Log in as tenant.
- Select the menu item *Conversations > Export* in the navigation bar.



Status	Active	Job Name	Type	Execution	Start Time
	X	WAV XML	Bulk job		01/18/2019 1:29:38 AM
	X	neo Conversation	Rule-based job		01/18/2019 1:28:21 AM

Fig. 1: Main view Export (example)

- Click on the icon  (*Create*) in the toolbar of the main view.
- Adjust the required settings in the tabs of the detail view. You can change tabs without buffering. The settings are not lost.
  - Details*, see [chapter "Tab Details", p. 10](#)
  - Schedule*, see [chapter "Tab Schedule", p. 11](#)
  - Criteria*, see [chapter "Tab Criteria", p. 14](#)
  - Drives*, see [chapter "Tab Drives", p. 22](#)
- To save the settings, click on the button *Save* in the detail view.
- When you are sure that all settings are correct, open the tab *Details* again and set the *status* of the export configuration to *Released* to activate the export job.
- To save the setting, click on the button *Save* in the detail view.

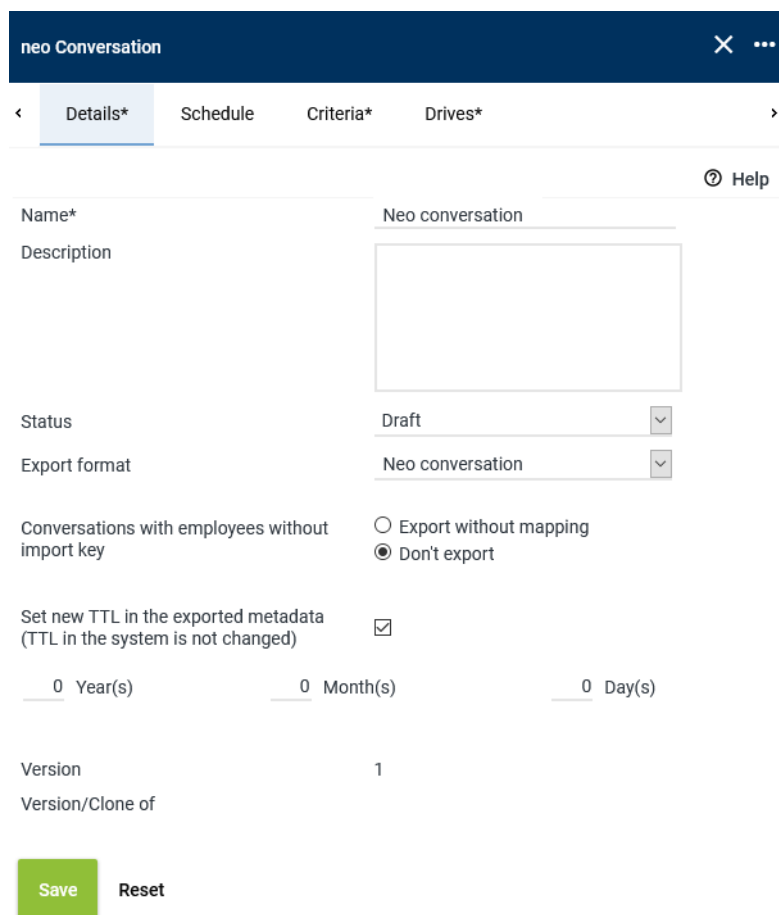
- ⇒ The export job is automatically started at the point in time defined in the schedule.  
All recordings which meet the defined criteria are exported to the defined drive in a proprietary format

## 5.1

### Tab Details

- Click on the tab *Details* to start configuring.

- ⇒ The following parameters appear:



neo Conversation

Details\* Schedule Criteria\* Drives\*

Help

Name\* Neo conversation

Description

Status Draft

Export format Neo conversation

Conversations with employees without import key

☐ Export without mapping  
☒ Don't export

Set new TTL in the exported metadata (TTL in the system is not changed) ☒

0 Year(s) 0 Month(s) 0 Day(s)

Version 1

Version/Clone of

Save Reset

Fig. 2: Tab Details - Export in *neo* Conversation format

<b>Name</b>	Enter the name of the job configuration.
<b>Description</b>	Here, you can enter a description for the job configuration.
<b>Status</b>	<p>Enter the status of the job configuration. Possible options:</p> <ul style="list-style-type: none"> <li><b>Draft</b> Select this status if you would like to be able to continue editing the job configuration.</li> <li><b>Released</b> Select this status if you have finished editing the job configuration. This status activates the job configuration. The job is automatically started at the point in time defined in the schedule. <b>NOTICE!</b> A released job configuration cannot be edited anymore.</li> <li><b>Deactivated</b> (Precondition: job configuration has been released) Select this status to deactivate the job configuration and thus the job.</li> </ul>

<b>NOTICE!</b> A deactivated job configuration cannot be activated again! To be able to edit or activate a deactivated job configuration, you have to create a new version of the job configuration.	
<i>Export format</i>	<p>To export recordings, select the format <u>neo</u> Conversation from the drop-down list.</p> <p>For information about the available formats see Supported export formats.</p>
<i>Conversations with employees without import key</i>	<p>Define whether conversations without a mapping are supposed to be exported.</p> <p><input checked="" type="radio"/> Export without mapping</p> <p>The conversations are exported without a mapping and thus cannot be mapped to an agent. As no additional data is available, only users who can see all recordings can see the recordings after an export.</p> <p><input type="radio"/> Don't export</p> <p>Only conversations with a mapping are exported. A subsequent mapping of the exported conversations after an import can only take place if the agents are identical in the destination system.</p>
<i>Set new TTL in the exported metadata (TTL in the system is not changed)</i>	<p>Activate this check box to define a period of time after which the exported data is supposed to be deleted on the destination system. This does not change the deletion time of the data in the source system.</p> <p>The following entry fields become active and can be configured:</p> <ul style="list-style-type: none"> <li>• Year(s)</li> <li>• Month(s)</li> <li>• Day(s)</li> </ul>
<i>Version</i>	Version number of the job configuration.
<i>Version/Clone of</i>	Job configuration from which the job configuration has been copied or cloned.

## 5.2

### Tab Schedule

Here, you can display and edit the settings of the schedule for executing the job.

<
Details\*
Schedule
Criteria
Drives\*
>

Execution

☒ Interval  
☐ Series

Period of Time

Interval

Series

Fig. 3: Export module - tab Schedule

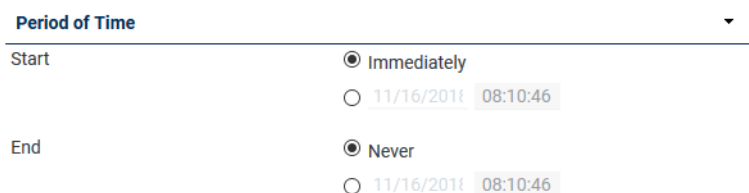
<i>Execution</i>	<p>Select whether the job is supposed to be executed in specified intervals or as a series.</p> <ul style="list-style-type: none"> <li>• <i>Interval</i></li> </ul> <p>The job is repeated in specified intervals. The interval is defined in the group field <i>Interval</i>.</p>
------------------	--

- *Series*

The job is executed on certain serial dates. These dates are defined in the group field *Series*.



### 5.2.1 Group field Period of Time

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



The screenshot shows the 'Period of Time' configuration window. It has a title bar 'Period of Time' with a dropdown arrow. Below the title bar, there are two sections: 'Start' and 'End'. Each section has a radio button for 'Immediately' (which is selected) and a radio button for 'Entered date' (which is unselected). Next to the 'Entered date' radio button, there are two input fields: one for the date '11/16/2016' and one for the time '08:10:46'.

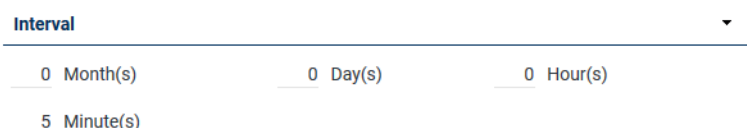
Fig. 4: Tab Schedule - configure group field Period of Time

<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 by clicking on 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 by clicking on the icon .</li> </ul>

### 5.2.2 Group field Interval

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

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



The screenshot shows the 'Interval' configuration window. It has a title bar 'Interval' with a dropdown arrow. Below the title bar, there are four input fields for time intervals: '0 Month(s)', '0 Day(s)', '0 Hour(s)', and '5 Minute(s)'.

Fig. 5: Schedule - Interval

You can define a certain period of time during which the job is supposed to be carried out. This offers the possibility to run export jobs during night time only, for instance.

**Activate period of time** Enter the period of time during which the job is supposed to be carried out.



Keep in mind that due to technical reasons those periods can only be configured on the top of the hour; half-hours are adjusted upward. This has an impact if the server containing the data to be exported is located in a time zone which differs from Coordinated Universal Time (UTC) by  $x \frac{1}{2}$  hours.

Example: Recorded data is supposed to be transferred from the export server in India (UTC + 5 1/2) to a target server in Germany during 8 pm and 10 pm Indian local time. This corresponds to 2:30 pm and 16:30 pm UTC. By adjusting the half-hour upward, the period for the export is translated into 3 pm to 5 pm which corresponds to Indian local time of 8:30 pm to 10:30 pm.

### 5.2.3

#### Group field Series

This group field is only active if the execution type *Series* has been selected.

Define at which points in time the job is supposed to be repeated.

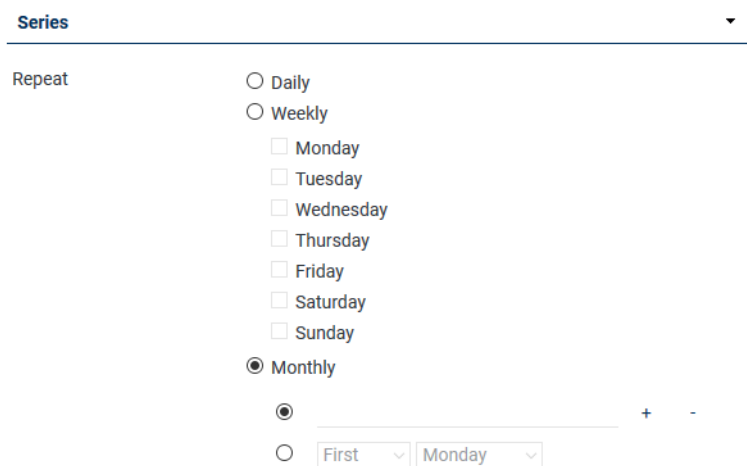


Fig. 6: Schedule - Series

<b>Repeat</b>	Days on which the job is supposed to be executed.
	<i>Daily</i> = The job is repeated daily at the entered time.
	<i>Weekly</i> = The job is repeated on the selected days at the entered time. You can select one or several weekdays.
	<i>Monthly</i> = The job is repeated on the selected days at the entered time. You can either select particular dates or certain days. See <a href="#">chapter "Configure monthly repetition on fixed dates"</a> , p. 14 and <a href="#">chapter "Configure monthly repetition on fixed days"</a> , p. 13.

#### 5.2.3.1

#### Configure monthly repetition on fixed days

1. Select the lower option:

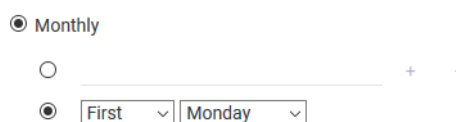


Fig. 7: Configure fixed days

2. In the two drop-down lists, select the day of every month on which the job is supposed to be executed.

### 5.2.3.2 Configure monthly repetition on fixed dates

1. Select the upper option:

☒ Monthly  
☐  + -  
☐ First  Monday

Fig. 8: Configure fixed dates

2. Click on the button + to select dates in a calendar.

Selected days

1	2	3	4	5	6	7	8
9	10	11	12	13	14	15	16
17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	

+ -

Fig. 9: Select dates

3. Click on all dates on which the job is supposed to be executed.  
To revoke a selection, click on the selected date once again. The selection is deleted.  
⇒ The selected dates are inserted automatically into the entry field.
4. Click on a spot outside the calendar to apply the selected dates and close the calendar.
5. If you would like to correct the selection of the dates, you can open the calendar again by clicking on the button + .  
Adjust the dates according to the description.
6. If you would like to delete all selected dates, click on the button - .  
⇒ All dates in the entry field are deleted.

## 5.3 Tab Criteria

Here, you can display and edit different criteria for the selected job configuration.

<

Details\*

Schedule

Criteria

Drives\*

Type

☐ Bulk job  
☒ Rule-based job

Behavior if no audio exists

☐ Export only XML file  
☒ Skip conversation

Consider Recordings

Agents

Conversation Direction

Duration

Calling Party Phone Number

Called Party Phone Number

PBX

Additional Data

Save

Reset

Fig. 10: Export module - tab Criteria



For jobs of the type *Bulk* you can only define criteria in the group fields *Conversation Types*, *Dependencies*, *Consider Recordings*, and *Consider Recordings Once*.

All other group fields are only available for rule-based jobs.

## General

<i>Type</i>	<p>Define whether the job is supposed to be rule-based or a bulk job.</p> <ul style="list-style-type: none"> <li>• <i>Bulk job</i> The job type <i>bulk</i> selects all recordings of a definable period of time. You can only define a period of time and a starting delay.</li> <li>• <i>Rule-based job</i> The job type <i>rule-based</i> enables the selection of conversations according to rules defined by the user. You can define several criteria in the different group fields for the rule creation.</li> </ul>
-------------	---

### 5.3.1 Group field Conversation Types

This group field is only available for the export format *neo* Conversation as only this export format allows exporting different conversation types.

Define which type of recordings is supposed to be considered.

**Conversation Types** ▼

---

Conversation type\*

- ☒ Call
  - ☐ without screen recording
  - ☒ without video recording
- ☐ Work item
- ☐ Text message
- ☐ Chat

Fig. 11: Group field Conversation Types



- *Call*  
Conversations with screen recordings (audio with screen or video call)
  - *Call without screen recording*  
Only video calls
  - *Call without video recording*  
Only calls with screen recording
- *Call + Call without screen recording + Call without video recording*  
Mere call recordings (only audio)
- *Work item*  
Mere screen recording (only video)
- *Text message*  
SMS recordings
- *Chat*  
Recordings of chat messages
- *Call + Work item + Text message + Chat*  
All recordings regardless of the conversation type.

### 5.3.2 Group field Consider Recordings

Define the period of time that conversations are supposed to be selected from.

**Consider Recordings** ▼


---

From 01/18/2019  01:29:38 

Data source


- ☒ only callpool
- ☐ also from expansions
- ☐ also from archives
- ☐ also from expansions and archives

Fig. 12: Criteria - Consider recordings

<i>From</i>	<p>Enter a start date for the period of time in which the conversations are supposed to have taken place. When executing the job, only conversations from the starting date and onwards are considered. The end date is the current date.</p> <p>You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.</p>
<i>Data source</i>	Select where the data of this job are supposed to come from.



### 5.3.3 Group field Consider Recordings Once

This group field appears in the detail view when selecting the option *Add New Period for Version* under the icon  (*Create*) in the toolbar.



This job can only be created on the basis of a released job and serves as a onetime search for data during a defined period of time. The menu item *Add New Period for Version* does not become active before an existing job has been released.

Define the period of time that conversations are supposed to be selected from.

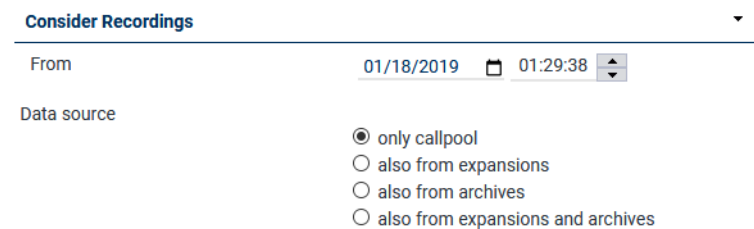




Fig. 13: Criteria - Consider Recordings Once

<i>From</i>	Enter a start date for the period of time in which the conversations which are supposed to be archived once again have taken place.  You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.
<i>To</i>	Enter an end date for the period of time in which the conversations which are supposed to be archived once again have taken place.  You can enter the date directly in both entry fields via the keyboard, via the icon  or via the arrow keys.

<i>Data source</i>		
	<i>only callpool</i>	The path of the callpool is scanned.
	<i>also from expansions</i>	All system expansions are scanned including cloud storage.
	<i>also from archives</i>	All archives are scanned with the exception of removable media such as DVD or RDX.
	<i>also from expansions and archives</i>	All 3 afore-mentioned storage locations are scanned.

Once the new version of the job is released, all versions of this job created with the function *Add New Period for Version* are displayed in a table as an overview here.

Consider Recordings Once

From

07/13/2020

08:04:57

To

07/14/2020

08:04:57

Data source

☒ only callpool

☐ also from expansions

☐ also from archives

☐ also from expansions and archives

Version	Start Time	End Time
2	Jul 13, 2020 8:04:57 AM	Jul 14, 2020 8:04:57 AM

Fig. 14: Criteria - table with information about completed job



### 5.3.4 Group field Agents

Define whether only the conversations of certain agents are supposed to be considered.


Agents	
<input checked="" type="checkbox"/> Activated	
Last Name ↕	
First Name ↕	
Agent	6.
Agent	5.

*Fig. 15: Criteria - Agents*

*Activated*      ☒ = Only conversations of the assigned agents are considered.  
☐ = Conversations of all agents are considered. The list of the selected agents is ignored.

	<i>Add</i>	Opens a window in which you can select and add agents (see <a href="#">chapter "Add agent", p. 18</a> ).
	<i>Remove</i>	Removes the selected agent from the list (see <a href="#">chapter "Delete agent assignment", p. 19</a> ).

#### 5.3.4.1 Add agent

1. In the tab *Criteria*, open the group field *Agents*.
2. To assign an agent, click on the icon  (*Add*).

**Agents** ▼

☒ Activated

Last Name ↕	First Name ↕
Agent	6.
Agent	5.

Fig. 16: Criteria - add agent

- Select one or several agents from the list.  
To revoke a selection, click on the respective line while holding the [Ctrl] key down.

**Add Agents** ✕

Employee Number ↕	First Name ↕	Last Name ↕	Login Name ↕	Date of Entry ↕	Date of Birth ↕
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			

Rows per page 20 ▼ 1 - 10 of 10 < << >> >

Add Cancel

Fig. 17: Criteria - select agent

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

### 5.3.4.2

#### Delete agent assignment


- Open the group field *Agents* in the tab *Criteria*.

**Agents** ▼

☒ Activated

Last Name ↕	First Name ↕
Agent	6.
Agent	5.

Fig. 18: Criteria - Delete agent assignment

- To delete the assignment of an agent to a job, select the respective agent in the list and click on the icon  (*Remove*).

### 5.3.5 Group field Conversation Direction

Define whether only the conversations with a certain direction are supposed to be considered.

Conversation Direction	
Activated	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Inbound <input checked="" type="checkbox"/> Outbound <input checked="" type="checkbox"/> Internal <input checked="" type="checkbox"/> Unknown

Fig. 19: Criteria - Conversation direction

<b>Activated</b>	<input checked="" type="checkbox"/> = Only conversations of the selected directions are considered. <input type="checkbox"/> = Conversations of all directions are considered. Possibly marked conversation directions are ignored.
	Mark the conversation directions which are supposed be considered. The marks are only considered if the option <i>Activated</i> has been marked.

### 5.3.6 Group field Duration

Define whether only the conversations with a certain duration are supposed to be considered.

Duration	
min. ( $\geq$ )	<input checked="" type="checkbox"/> <div> <input type="text" value="0"/> Hour(s)  <input type="text" value="45"/> Minute(s)  <input type="text" value="0"/> Second(s)         </div>
max. ( $\leq$ )	<input checked="" type="checkbox"/> <div> <input type="text" value="2"/> Hour(s)  <input type="text" value="0"/> Minute(s)  <input type="text" value="0"/> Second(s)         </div>

Fig. 20: Criteria - Duration

<b>min. (<math>\geq</math>)</b>	Threshold value for the minimum duration of conversations which are supposed to be considered. <input checked="" type="checkbox"/> = The minimum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is considered. Only conversations are recorded which have at least the entered duration. <input type="checkbox"/> = The minimum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is not considered.
<b>max. (<math>\leq</math>)</b>	Threshold value for the maximum duration of conversations which are supposed to be considered. <input checked="" type="checkbox"/> = The maximum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is considered. Only conversations are recorded which have at maximum the entered duration. <input type="checkbox"/> = The maximum duration entered in the fields <i>Hour(s)</i> , <i>Minute(s)</i> and <i>Second(s)</i> is not considered.




If you have activate the minimum duration as well as the maximum duration, only conversations are considered which lie between the threshold values.

### 5.3.7 Group field Calling Party Phone Number

Define whether only the conversations are supposed to be considered which have been initiated by certain phone numbers.

**Calling Party Phone Number** ▼

☐ Activated

Calling Party Phone Number	Edit
0602150010	
0602150012222	
060215013333	

**Add** **Delete**


Fig. 21: Criteria - Calling Party Phone Number

**Activated**


☒ = Only conversations with the assigned phone numbers are considered.





☐ = Conversations with all phone numbers are considered. The list of the phone numbers is ignored.

#### Phone number assignment

<b>Add</b>	Adds a new entry to the list. Open the new entry ( <i>New Value</i> ) to enter a new phone number, see <a href="#">chapter "Edit entry", p. 21</a> .
<b>Delete</b>	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see <a href="#">chapter "Edit entry", p. 21</a> .



#### 5.3.7.1 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.

0602150013333	
0602150014444	
<input type="text" value="New value"/>	 

**Add** **Delete**

Fig. 22: 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*).

### 5.3.8 Group field Called Party Phone Number

Define whether only the conversations to certain destination phone numbers are supposed to be considered.

**Called Party Phone Number** ▼

☐ Activated

Called Party Phone Number	Edit
0602150014444	
0602150015555	
0602150016666	

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


Fig. 23: Criteria - Called Party Phone Number

**Activated**

☒ = Only conversations with the assigned phone numbers are considered.

☐ = Conversations with all phone numbers are considered. The list of the phone numbers is ignored.

#### Phone number assignment

<a href="#">Add</a>	Adds a new entry to the list. Open the new entry ( <i>New Value</i> ) to enter a new phone number, see <a href="#">chapter "Edit entry", p. 21</a> .
<a href="#">Delete</a>	Deletes the selected phone number from the list.
	Opens the selected phone number for editing, see <a href="#">chapter "Edit entry", p. 21</a> .

### 5.3.9 Group field PBX

Define whether only the conversations of a certain **PBX** are supposed to be considered.

**PBX** ▼

☐ Activated

PBX

Fig. 24: Criteria - PBX

**Activated**

☒ = Only conversations of the selected **PBX** are considered.

☐ = Conversations of all **PBXs** are considered. A possibly selected PBX is ignored.

**PBX**

Select the respective **PBX** from the drop-down list if it is supposed to be considered.

### 5.4 Tab Drives

In this tab, you can display and select the export drive.

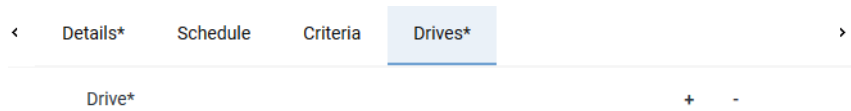


Fig. 25: Tab Drives

+	Opens a window in which you can select a drive, see <a href="#">chapter "Assign drive", p. 23</a> .
-	Deletes the entry from the entry field.



A drive can be used in several job configurations as long as the drive is not used actively by a configuration.

If a drive is currently used actively by a job, no additional job which uses the same drive can be released or activated. This behavior includes all modules, i. e. regardless of the module that the configuration belongs to.



If the assigned drive is full during the execution of a job before the export job could copy all data to the drive, then the export job is paused automatically.

Information about the job status and about the status of the drive can be found in the application System Monitoring.



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

#### 5.4.1

#### Assign drive

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

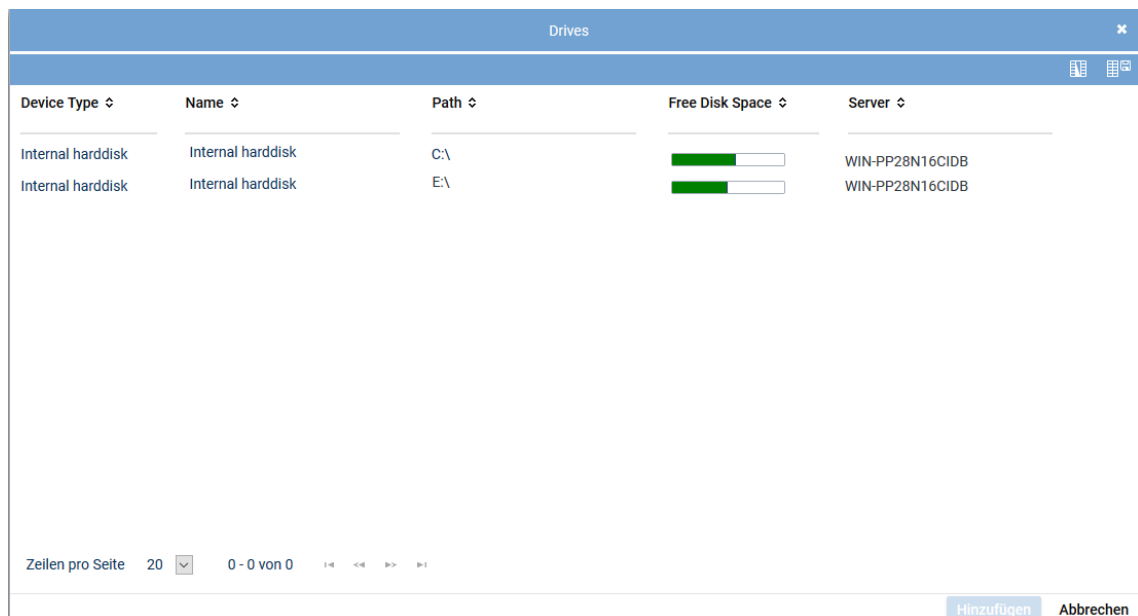


Fig. 26: Add drive

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

### 5.5 Start export

To start an export job, you can set the status in the tab *Details* to *Released*.

- *Draft*

This status has been set by default while creating a job. As long as the status is Draft you can edit the configuration.

- *Released*

Select this status if you have finished editing the job configuration. This status activates the job configuration.

The job is automatically started at the point in time defined in the schedule.

**NOTICE!** A released job configuration cannot be edited anymore.

- *Deactivated*

(Precondition: job configuration has been released)

Select this status to deactivate the job configuration and thus the job.

**NOTICE!** A deactivated job configuration cannot be activated again! To be able to edit or activate a deactivated job configuration, you have to create a new version of the job configuration.

1. 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.



When having activated the function *Post-compression* and having created an export job that is supposed to export the compressed data to a [NAS](#), you must create a new version of the export job after updating the Neo. It is not sufficient to only save the job again. If you do not create a new version of the export job, the data is not compressed before being exported.



If an export job fails, you are informed about this at the following locations in the Neo 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.

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



For basic information about the Notifications module refer to the administration manual for tenants *Notifications module*.



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



## 6

## Import recordings into the destination system

## Preconditions for the import

1. The recordings to be imported must have been exported from the source system.
2. On the target server, the function *Import* must have been activated, see administration manual *Configuration servers and recording architectures*.
3. The user must have all access rights to the respective drives.
4. CustomCP fields that have been configured in the source system must be configured in the destination system, too.



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

To import the recordings in the destination system, you as system provider have to create and activate an import configuration in the Recording Import module of the application System Configuration.



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

5. On the destination system, open the application System Configuration.
6. Select the menu item *Setup > Recording Import* in the navigation bar.

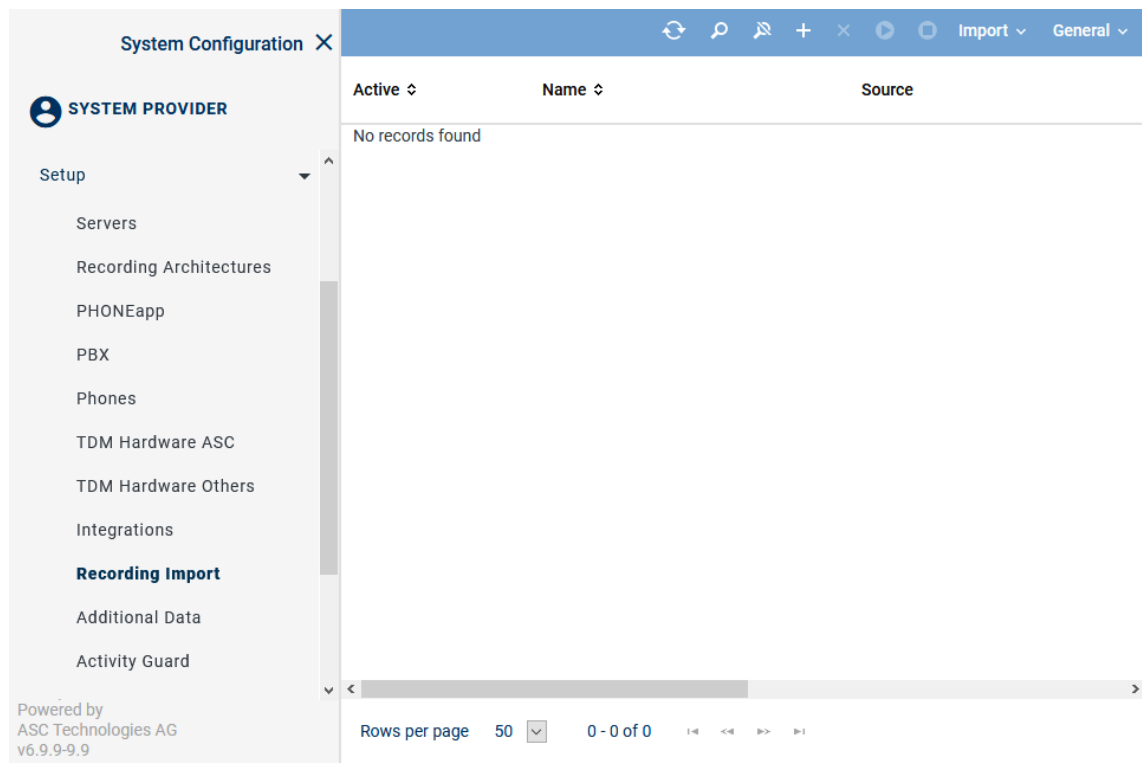


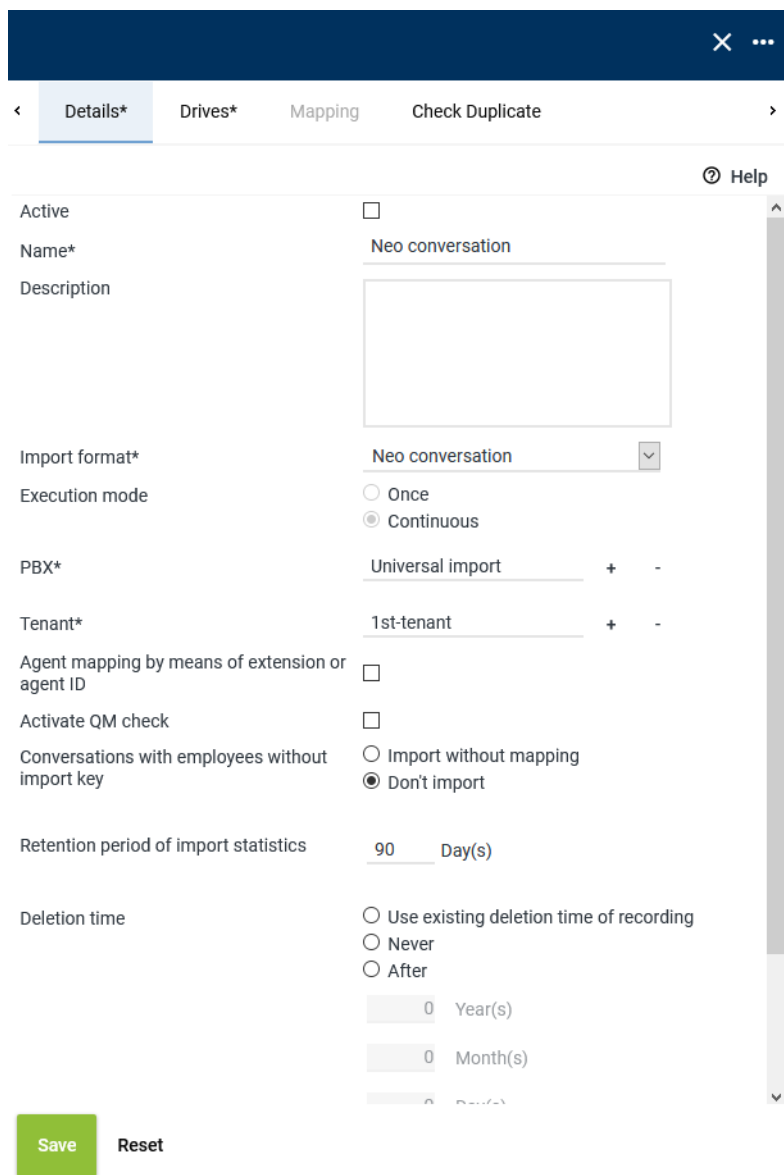
Fig. 27: Main view Import (example)

7. Click on the icon  (*Create*) in the toolbar of the main view.

## 6.1

## Tab Details

1. Select the tab *Details* and configure the import job.



The screenshot shows the 'Details' tab of the 'Recording Import' module. The interface includes a top navigation bar with tabs: 'Details\*' (selected), 'Drives\*', 'Mapping', and 'Check Duplicate'. Below the tabs is a 'Help' icon. The main form contains the following fields and options:

- Active:** A checkbox that is currently unchecked.
- Name\*:** A text field containing 'Neo conversation'.
- Description:** A large empty text area.
- Import format\*:** A dropdown menu showing 'Neo conversation'.
- Execution mode:** Two radio buttons: 'Once' (unchecked) and 'Continuous' (checked).
- PBX\*:** A text field containing 'Universal import' with '+' and '-' buttons.
- Tenant\*:** A text field containing '1st-tenant' with '+' and '-' buttons.
- Agent mapping by means of extension or agent ID:** An unchecked checkbox.
- Activate QM check:** An unchecked checkbox.
- Conversations with employees without import key:** Two radio buttons: 'Import without mapping' (unchecked) and 'Don't import' (checked).
- Retention period of import statistics:** A text field containing '90' followed by 'Day(s)'.
- Deletion time:** Three radio buttons: 'Use existing deletion time of recording' (unchecked), 'Never' (unchecked), and 'After' (unchecked). Below these are three input fields for 'Year(s)', 'Month(s)', and 'Day(s)', each with a '0' value.

At the bottom left, there are two buttons: 'Save' (green) and 'Reset'.

Fig. 28: Recording Import module - tab Details

<b>Active</b>	<p>Tick the check box to activate the import job.</p> <p><input checked="" type="checkbox"/> = Job is active.</p> <p><input type="checkbox"/> = Job is not active.</p> <p>If you have activated the configuration by ticking the check box, the import starts upon saving the settings.</p>
<b>Name</b>	Enter the name of the import job.
<b>Description</b>	Here, you can enter a description of the import job.
<b>Import format</b>	Select the import format from the drop-down list <u>neo</u> Conversation.
<b>Codec</b>	This setting has been preselected and cannot be changed for this import format.
<b>Execution mode</b>	<p>Select whether the import is supposed to be executed once or continuously.</p> <ul style="list-style-type: none"> <li>• <b>Once</b> <p>The import is started upon activating the import job. The source directory is checked for data only once.</p> </li> <li>• <b>Continuous</b></li> </ul>

	<p>The import is started permanently upon activating the import job and does not end before the import job is deactivated manually. The source directory is constantly checked for new data as long as the import job is active.</p> <p><b>NOTICE!</b> For some import formats only continuous execution is available. In this case, the present setting is automatic.</p>
<i>PBX</i>	<p>Select for which <b>PBX</b> the data is supposed to be imported.</p> <p>+ Opens a window in which you can select a PBX, see <a href="#">chapter "Assign PBX"</a>, p. 28.</p> <p>- Deletes the entry from the entry field.</p> <p>It is necessary to assign the imported data to a <b>PBX</b> so that the extensions and the PBX Agent IDs from the source system can be assigned to this PBX correctly.</p>
<i>Tenant</i>	<p>Select which tenant the imported recordings are supposed to be mapped to.</p> <p>+ Opens a window in which you can select a tenant, see <a href="#">chapter "Assign tenant"</a>, p. 28.</p> <p>- Deletes the entry from the entry field.</p> <p><b>NOTICE!</b> In a 1-tenant system, the tenant is entered here automatically. The setting cannot be changed.</p>
<i>Agent mapping by means of extension or agent ID</i>	<p>Tick the check box if you would like to configure a mapping by means of the extension or the PBX Agent ID for the import job which does not exist in the source system.</p>
<i>Activate QM check</i>	<p>Tick the check box if the Recording Planner is supposed to run a quality management check for the import job and if a session of the recording is supposed to be created in the destination system as a result.</p>
<i>Conversations with employees without import key</i>	<p>Select how the import job is supposed to handle the conversations with employees without import key.</p> <ul style="list-style-type: none"> <li>• <i>Import without mapping</i> Conversations with employees who do not have an import key in the destination system are imported without being mapped to an employee.</li> <li>• <i>Don't import</i> Conversations with employees who do not have an import key in the destination system are not imported but stored in the following directory:  <code>&lt;Import-source-directory&gt;\RCInfo\failed</code>            If you find data in this directory after an import, please contact your local ASC support or call ASC support at +49 700 27278776.</li> </ul> <p><b>NOTICE!</b> Conversations which have been exported from the source system without having been mapped to an employee will be imported without a mapping, regardless of the option which is selected here.</p> <p><b>NOTICE!</b> The tenant can map an import key to its employees manually in the Employees module. When importing employees from an <b>LDAP</b> source, import keys are created automatically.</p>
<i>Retention period of import statistics</i>	<p>Enter the retention period for the import statistics. With this information, you can generate a report about the imports of recordings. The entries apply from the time of the import.</p>

**Deletion time**

Select the conditions for deletion by activating the corresponding radio buttons.

The following options are available:

- *Use existing deletion time of recording*

The imported data is deleted based on the deletion time set before the import.

- *Never*

The imported data is never deleted.

- *After*

The imported data is deleted after the time configured here. Enter the corresponding time.

**6.1.1 Assign PBX**

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



Name	Type
SIP	Universal VoIP
Cisco ...	Cisco UCM
Avaya_1	Avaya CM
Cisco Jabber	Cisco Jabber
Universal import	Universal import
Universal analog CM	Universal analog CM
OpenScape Xpert	OpenScape Xpert

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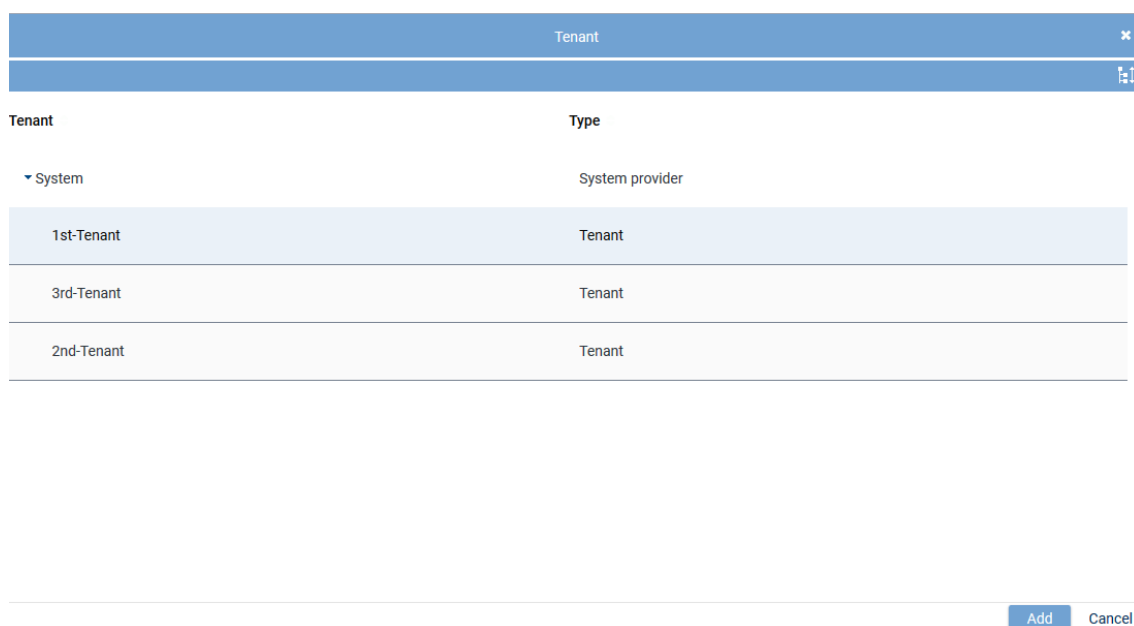
Add Cancel

Fig. 29: Add PBX

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

**6.1.2 Assign tenant**

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



Tenant	Type
System	System provider
1st-Tenant	Tenant
3rd-Tenant	Tenant
2nd-Tenant	Tenant

Fig. 30: Add tenant

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

## 6.2

### Tab Drives

- Select the tab *Drives* to configure the drive from which the data is supposed to be imported.

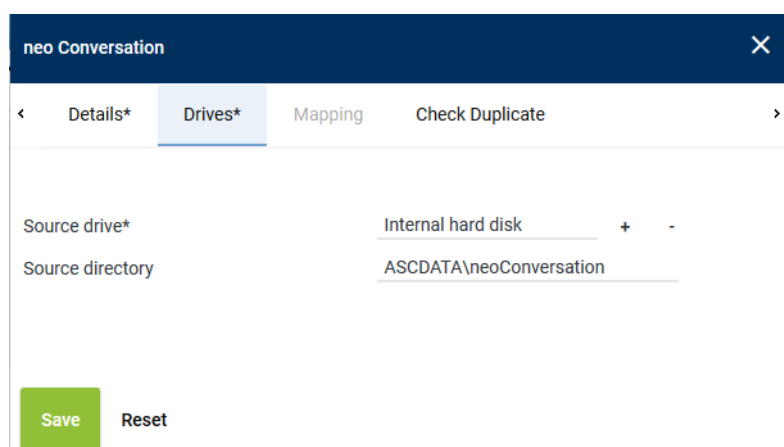


Fig. 31: Recording Import module - tab Drives

<i>Time zone</i>	Select the time zone from the drop-down list that the time indicated in the data to be imported refers to.
<i>Source drive</i>	Select the drive from which the data is supposed to be imported, see <a href="#">chapter "Assign drive", p. 23</a> .
<i>Source directory</i>	Enter the directory from which the data is supposed to be imported.

- To save the settings, click on the button *Save* in the detail view.
  - When you are sure that all settings are correct, open the tab *Details* again and activate the import job by ticking the check box *Active*.
  - To save the setting, click on the button *Save* in the detail view.
- ⇒ Once the import job has been activated, the data is imported from the indicated directory.

- ⇒ Audio data is imported into the call pool of the destination system. Subsequently, they are visible in the replay applications of the destination system and can be searched, replayed, and archived if required.
- ⇒ Meta data is imported into the database of the destination system.

### 6.3 Tab Mapping

No mapping is required when importing recordings in the format *neo* Conversation. The recordings already contain additional data; for this reason, this tab is not active when using the import format *neo* Conversation for the import.

### 6.4 Tab Check Duplicate

When importing with the import format *neo* Conversation, you have the option to delete duplicates.

1. Select the tab *Check Duplicate* to configure the rules for checking for duplicates.

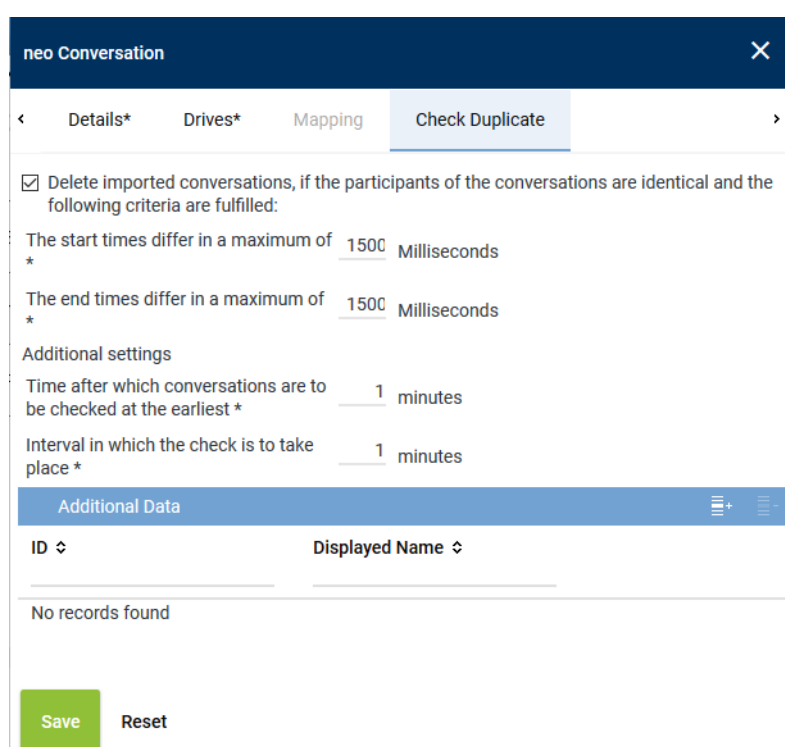


Fig. 32: Recording Import module - tab Check Duplicate


2. Activate the check box
  - ☒ *Delete imported conversations, if the participants of the conversations are identical and the following criteria are fulfilled:*
    - ⇒ The configuration becomes active and the criteria can be configured.

<i>The start times differ in a maximum of</i>	Enter the difference of the start times in milliseconds, e. g. 1500.
<i>The end times differ in a maximum of</i>	Enter the difference of the end times in milliseconds, e. g. 1500.
<b>Additional settings</b>	
<i>Time after which conversations are to be checked at the earliest</i>	Enter the time that is supposed to pass after the import, before the conversations are checked for the criteria, e. g. 1 minute.

*Interval in which the check is to take place* Enter the interval in which the check is to take place, e. g. 1 minute.

#### 6.4.1 Map additional data

In addition to the start time and the end time, you can configure more additional data which is supposed to be used for checking for duplicates.

1. In the list *Additional data*, click on the icon  (*Add*) to configure more additional data.

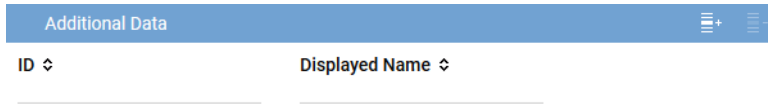
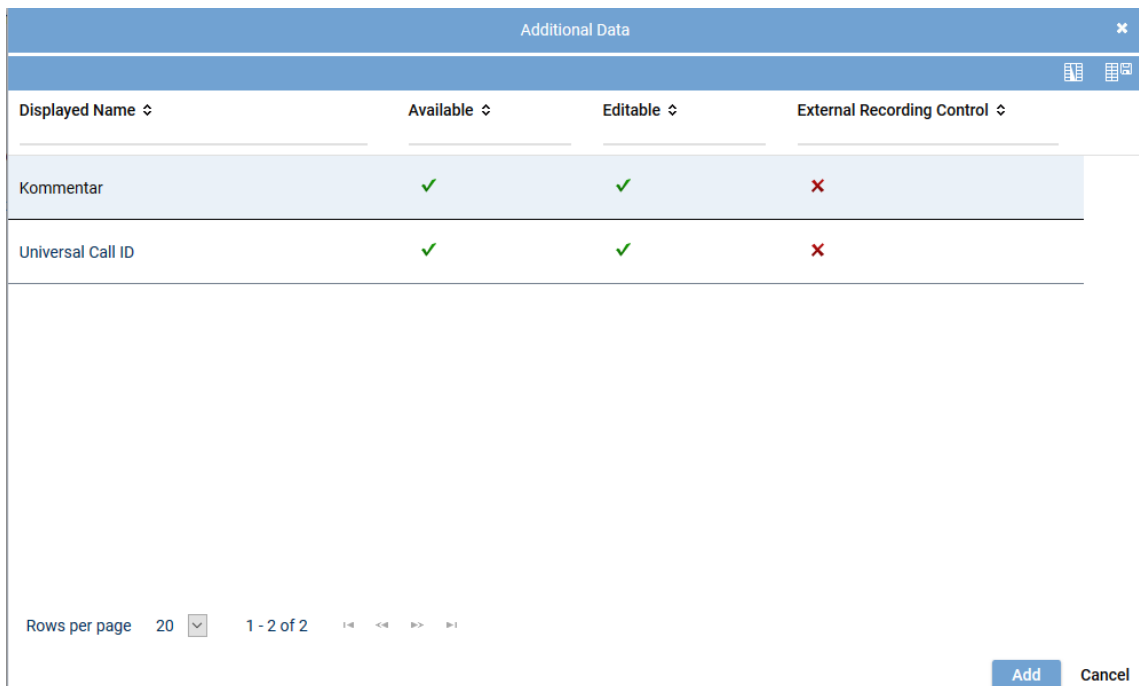


Fig. 33: Map additional data

2. Select the respective additional data from the list which are supposed to be used additionally to check for duplicates.  
To select several entries or revoke a selection, click on the respective line while holding the [Ctrl] key down.



Displayed Name	Available	Editable	External Recording Control
Kommentar	✓	✓	✗
Universal Call ID	✓	✓	✗

Fig. 34: Select additional data

**NOTICE!** The list contains only additional data which have been configured in the Additional Data module previously.



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

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

#### 6.5 Start and stop import

1. To start the import job, change to the tab *Details*.

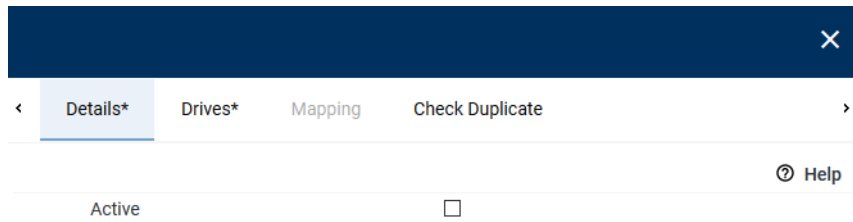


Fig. 35: Activate import job


<b>Active</b>	<p>Tick the check box to activate the import job.</p> <p><input checked="" type="checkbox"/> = Job is active.  <input type="checkbox"/> = Job is not active.</p> <p>As long as an import job is active, the recording system checks whether new files are available in the source directory. If new data is available, it is imported directly.</p>
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2. Click on the button **Save**. This automatically starts the import.
3. To cancel the import job, you have to deactivate the option and save the settings 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*.



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### Glossary

#### **LDAP**

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Lightweight Directory Access Protocol

#### **NAS**

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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**

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Private Branch Exchange