NICE PUBLIC SAFETY SOLUTIONS

NICE INFORM SYSTEM ADMINISTRATION USER GUIDE

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Important Notice

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1 Welcome

Welcome to the NICE Inform System Administration application. This application enables administrators to install and configure the physical NICE Inform servers, and to add labels to the various system entities, including NICE Recording/NICE Inform Recorder data sources, NLS audio data sources, resources, Inform Servers, etc.

NOTE: An NLS audio data source incorporates two data source types. These are NiceCLS 8.9/9.0 and NiceLog loggers only audio.

Saving and canceling changes

The System Administration application consists of many tabbed pages. Many of these pages have a **Save** and a **Cancel** button.

The **Save** button commits the changes you have just made. If you try and navigate from the page without saving you are asked if you wish to save the changes. If at any time you wish to change any settings back as they were, click the **Cancel** button prior to clicking the **Save** button.

Application privileges

To use the System Administration application, you **MUST** have the required privilege allocated to you (refer to *Application privileges* in *NICE Inform User Administration*). If not, the System Administration option is not displayed in the Application selector bar when you log in.

2 Navigation panel

NOTE: Specific terminology is used when navigating the tree pane. For help with this terminology, refer to Tree structure terminology (see page 4).

If Archive is licensed **ONLY** the Inform Servers node is available.

The Navigation panel consists of a tree pane which has the following nodes:

- **Site1** - a fixed node for configuring your NICE Inform site.
  - **Data sources** - a fixed node containing all data sources and data source groups:

NOTE: If a data source node appears like this it is in a legacy state. For information about legacy data sources, refer to Adding a legacy data source (see page 20).

    - **NICE Recording/NICE Inform Recorder data sources** - this also incorporates NICE Recording eXpress data sources.
    - **NLS audio data sources** - this incorporates two data source types which are NiceCLS 8.9/9.0 and NiceLog loggers only audio.
    - **NICE Interaction Management data sources** - this also incorporates NICE Perform and NICE Perform eXpress data sources.
    - **NICE Inform hub data sources**
    - **Media Vault data sources**
    - **VPI Audio Logger data sources**
    - **CAD data source** - you can add up to 9 data sources of this type.
  - **Replay devices** - a fixed node containing all the replay devices for replaying certain recordings outside of NICE Inform (e.g. Motorola Dimetra radio).
  - **Workstations** - a fixed node containing all the workstations that have been added to the system.
  - **Inform Servers** - a fixed node containing all the NICE Inform servers in the system.
  - **Hub accounts** - fixed node containing all the hub accounts that have been added to the system. A hub account is used to gain access to the resources that have been assigned to the account from another NICE Inform system.
  - **Mapping** - a fixed node containing all the maps which are made up of different layers which create a view.
  - **Audio Analytics** - a fixed node where NICE Inform Audio Analytics is configured. Audio analytics is the process of converting audio recordings to text.
  - **Applications** - a fixed node where system wide settings are configured for a particular NICE Inform application.

- **Resource Groups** - a fixed node that lists all the resource groups that have been created. A resource group is attached to a user to specify the resources that user has been granted access to by their System Administrator.
- **Positions** - a fixed node that lists all the positions that have been created. A position is representative of a physical location whereby system workstations have a direct relationship with resources.
- **Notifications** - a fixed node where you can configure notification settings for NICE Inform Evaluator.

System Administration tasks

System Administration is concerned solely with the installation and configuration of the system servers, and the addition of meaningful labels to the various system entities. Selecting the various elements in the tree structure displays an associated page in the right hand panel that enables you to create a new entry or modify or delete an existing one. Creating a new entry often starts an associated wizard to provide a logical, step-by-step approach. Refer to System Administration functions (see page 6) for a summary of the various tasks associated with System Administration.

2.1 Button bar

There are several available buttons within System Administration for selection:

Table 2-1: System Administration button bar

Button	Description
	Add - displays a drop down menu that allows you to add new entities (e.g. data sources data source groups, NICE Inform servers, resource groups and positions). The button remains inactive until you select a node or branch that allows you to perform this function.
	Delete - deletes the selected node in the tree pane. You are required to confirm the action. The button remains inactive until you select a node or branch that allows you to perform this function.
	Move - moves the selected node in the tree pane. The button remains inactive until you select a node or branch that allows you to perform this function.
	Refresh data - refreshes the tree structure and any lists displayed in the right hand pane.

2.2 Adding and removing items

Adding and removing items (e.g. resources and workstations) to and from selected lists is frequently used within NICE Inform System Administration.

NOTE: The following options may differ when adding and removing items.

- To add items to the list:

1. Highlight the required item in the Available list.
2. Click the **Add >** button. The item is moved to the Selected list.
3. Repeat for each required item.

NOTE: To move all items to the Selected list, click the **Add All >>** button.

- To remove items from the Selected list:

1. Highlight the required item in the Selected list.
2. Click the **< Remove** button. The item is moved to the Available list.
3. Repeat for each item required.

NOTE: To move all items from the Selected list, click the **<< Remove All** button.

Additional Operations

- If you wish to select all but one or two items, click the **Add All >>** button to move all items to the Selected list, then remove the items not required.
- The **Quick Search** facility enables you to find the required item. Enter the required text in the box and click **Go**. The search returns all items containing that text as part of its name. The search is **NOT** case sensitive.

Table 2-2: List order controls

Button	Description
	Moves the highlighted item to the top of the list.
	Moves the highlighted item up one place in the list.
	Moves the highlighted item down one place in the list.
	Moves the highlighted item to the bottom of the list.

2.3 Tree structure terminology

A tree structure is used throughout NICE Inform to aid in your navigation of the application suite and is required to perform further functions. Using the Resource Groups section in System Administration as an example, there are several terms used when navigating the tree:

NOTE: Refer to the table below for a key to each feature.

Figure 2-1: Navigating the tree example

Table 2-3: Tree structure terminology

Feature number	Description
1	Nodes
2	Parent
3	Child/sub group

- **Node** - everything in the tree is classed as a node.
- **Parent** - the top level node e.g. **Resource Groups**.
- **Child** (or sub group) - the node below its parent.
- A child (or sub group) can also be a parent as well. Using the example above, the Dispatchers node is a child of the **Resource Groups** node but is also a parent of the **First response** node.
- To expand a node, click the ⊞ button alongside the node.
- To collapse a node, click the ⊟ button alongside the node.

3 System Administration functions

The main actions involved in System Administration are:

Site

Data sources

- **NICE Recording/NICE Inform Recorder data sources**

NOTE: The functions when adding, editing a data source and editing and deleting resources for a NICE Recording eXpress data source are identical to that of a NICE Recording data source. Please refer to the instructions for a NICE Recording/NICE Inform Recorder data source. However, the configuration pages for the data source (e.g. Recording schedules (see page 70)) are specific to supported versions of NICE Recording data sources only.

  Supported NICE Recording versions only:

- **NLS audio data sources**

- **NICE Interaction Management data sources**

NOTE: The functions when configuring a NICE Perform or a NICE Perform eXpress data source are identical to that of a NICE Interaction Management data source. Please refer to the instructions for a NICE Interaction Management data source.

4 NICE Inform site

This section details the configuration of your NICE Inform site.

It covers the following areas:

- Editing site details (see page 10)
- Site settings (see page 11)

4.1 Editing site details

NOTE: Specific terminology is used when navigating the tree pane to edit the NICE Inform site details. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit the details of your NICE Inform site:

1. In the tree pane, expand the **Recording Systems** node and select the **Site** node.
2. Click on the **General** tab and the **General** page is presented.
3. Edit the details as required:
   - **Label** - edit the name for the site to something more relevant to your NICE Inform site.
   - **Description** - edit the description for the site.

Options

The following option is available:

- **Enable maintenance mode on next login** - check this box and next time you log in, you can view all maintenance resources in order to reference directly to the channels on the logger within all resources tables.

NOTE: To be able to view maintenance resources you **MUST** have the required privilege allocated to you. For help regarding application privileges, (refer to *Application privileges* in *NICE Inform User Administration*).

You will stay in **Maintenance mode** until you logout of NICE Inform. The next time you log back in, you **CANNOT** view maintenance resources unless you have re-ticked the box prior to logging out.

ANI/ALI class of service considered mobile devices

In order to view ANI/ALI location information for mobile devices on the *Timeline display* and *GIS Map panel* in *NICE Inform Reconstruction*, you first must add the Class of Service for the designation of the type of telephone service e.g. WPH1. This section provides the functionality to add, edit and delete Class of Service for the mobile type of telephone service.

- **Adding a Class of Service**

To add a Class of Service:

1. Click the **Add** button within the **Class of Services** table and the **Add Class of Service** dialog is presented.
2. Enter the **Class of Service** name in the **Service name** text box e.g. WPH1.
3. Click the **OK** button.

The new Class of Service is added to the **Class of Services** table.

- **Editing a Class of Service**

To edit a Class of Service:

1. Select the required Service name from within the **Class of Services** table.
2. Click the **Edit** button within the **Class of Services** table and the **Edit Class of Service** dialog is presented.
3. Edit the **Class of Service** name in the **Service name** text box e.g. WPH1.
4. Click the **OK** button.

The new Class of Service is updated within thee **Class of Services** table.

- **Removing a Class of Service**

To remove a Class of Service:

1. Select the required Service name from within the **Class of Services** table.
2. Click the **Remove** button.

The Class of Service is now removed from the **Class of Services** table.

NOTE: Once you have edited the details of your NICE Inform site, click the **Save** button.

4.2 Site settings

NOTE: Specific terminology is used when navigating the tree pane to change the details of the NICE Inform site. For help with this terminology, refer to Tree structure terminology (see page 4).

To configure the settings of your NICE Inform site:

1. In the tree pane, expand the **Recording Systems** node and select the **Site** node.
2. Click on the **Settings** tab and the **Settings** page is presented.

The following sections are available:

- PCM Format (see page 12)
- Security Key Servers (see page 12)

- Tone Filter (see page 14)

4.2.1 PCM Format

There are two PCM (Pulse Code Modulation) format types available for selection. You must select the correct PCM companding scheme that the logging system uses.

▸ To select the PCM format type:

1. To select the PCM format type:
   - **A-Law**.
   - **µ-Law**.
2. Click the **Save** button.

4.2.2 Security Key Servers

Some types of data that has been logged on a NICE logger are in an encrypted form. Keys obtained from key servers are required to decrypt this data. This section allows you to add, edit and remove security key servers configured in the system in order to decrypt this data.

The following options are available:

Adding a new security key server

▸ To add a new security key server:

1. Click the **Add** button and the **Add Server** dialog is presented.
2. Enter the following server information:
   - **Label** - enter a label (name) for the security key server in the text box provided.
   - **Network address** - enter the hostname or IP address for the security key server in the text box provided.
   - **Port** - specify the port to connect to the security key server in the text box provided.
   - **Type** - click the down arrow and select the required type of security key server.
   - **Security token** - enter a security token for the security key server in the text box provided. If a default security token has already been entered for this security key server, it is displayed in the text box for your reference. If required, you can overwrite the default security key server. A default security token can be added in the text box underneath the **Servers** table.
3. Click the **OK** button followed by the **Save** button. The new security key server is added to the **Servers** table.

The columns displayed in the Servers table are:

NOTE: Apart from the ℹ column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 4-1: Servers table columns

Column	Description
	An icon is displayed only if the last attempt to contact the security key server was unsuccessful.
Label	The label (or name) entered for the security key server.
Network address	The hostname or IP address for the security key server.
Port	The port used to connect to the security key server.
Server type	The type of security key server.
Security token	The security token provided for the security key server.

To update the status of all security key servers, click the **Refresh data** button.

Editing a security key server

- To edit the details of a security key server:

1. Select the security key server from within the **Servers** table.
2. Click the **Edit** button and the **Edit Server** dialog is presented.
3. Change the details as required:
   - **Label** - edit the label (name) for the security key server in the text box provided.
   - **Network address** - edit the hostname or IP address for the security key server in the text box provided.
   - **Port** - edit the port to connect to the security key server in the text box provided.
   - **Type** - click the down arrow and change the required type of security key server.
   - **Security token** - edit the security token for the security key server in the text box provided. If there has already been a default security token entered for this security key server, it is displayed in the text box for your reference. You can add a default security token in the text box underneath the Servers table.
4. Click the **OK** button followed by the **Save** button. The security key server is updated in the **Servers** table.

Adding a default security token

To save time adding a new security key server, a default security token can be added. When adding a new security key server, the **Security token** text box is automatically pre-populated with this security token.

Enter the default security token using the text box provided under the **Servers** table.

Removing a security key server

- To remove a security key server:

1. Select the security key server from within the **Servers** table.
2. Click the **Remove** button. The security key server is removed from the **Servers** table.

3. On completion, click the **Save** button.

4.2.3 Tone Filter

The tone filter can be enabled to remove a constant tone from a recording. This feature should only be used if the system has a tone applied to its recordings.

It is applied when searched recordings are retrieved in NICE Inform Reconstruction, Organizer, Verify and Monitor. This means that all playback has the tone filtered out. Refer to the list below for the conditions as to when the tone is filtered out.

- **Reconstruction -** playback, saving a scenario and saving audio.
- **Organizer** - playback and distributions.
- **Verify** - playback.
- **Monitor** - playback.

To enable the tone filter:

1. Check the **Enable Tone Filter** box.
2. Enter the tone frequency (default 2175Hz) in the text box provided.
3. On completion, click the **Save** button.

5 Adding a resource

Before you can add a resource you first need to add a data source (refer to Adding a data source (see page 17)) e.g. NICE Recording/NICE Inform Recorder or NICE Interaction Management data source.

There are two methods of adding a resource:

- Automatically (see page 15)
- Manually (see page 15)

5.1 Automatically

By using Import Resources Wizard, resources can be added automatically by either importing from a data source or from a CSV file.

There are different methods of importing resources depending on the type of resource:

From a data source

- Importing NICE Recording/NICE Inform Recorder resources from a data source (see page 39)

NOTE: The process of importing NICE Recording eXpress resources from a data source is the same as importing NICE Recording/NICE Inform Recorder resources from a data source.

- Importing NLS audio resources from a data source (see page 78)
- Importing NICE Interaction Management resources from a data source (see page 96)

NOTE: The process of importing NICE Perform/NICE Perform eXpress resources from a data source is the same as importing NICE Interaction Management resources from a data source.

- Importing resources from a NICE Inform hub data source (see page 136)
- Importing resources from a Media Vault data source (see page 140)
- Importing VPI Audio Logger resources from a data source (see page 144)
- Importing CAD resources from a data source (see page 153)

From a CSV file

- Importing resources from a CSV file (see page 40)

5.2 Manually

A resource can be added into the NICE Inform system manually. This process differs depending on the type of resource either by:

- Adding a NICE Recording/NICE Inform Recorder resource manually (see page 42)
- Adding an NLS audio resource manually (see page 81)

- Adding a NICE Interaction Management resource manually (see page 100)

NOTE: The process of manually adding NICE Perform or NICE Perform eXpress resources is the same as manually adding NICE Interaction Management resources.

Any user searching for recordings on one or more of these recently added or imported resources **MUST** first log out and back into NICE Inform.

6 Data sources

This section details the adding and configuration of your data sources.

It covers the following areas:

6.1 Adding a data source

NOTE:	Specific terminology is used when navigating the tree pane to add a data source. For help with this terminology, refer to Tree structure terminology (see page 4).

Before adding a new data source be aware of the following:

- When adding a NICE Recording/NICE Inform Recorder Core Server Resilience data source, only add the Active (primary) server. All Standby server details are retrieved automatically by the Core API from the Active server and displayed in the NICE Recording/NICE Inform Recorder resilient servers (see page 46) page.
- When adding an NLS audio data source and configuring NICE Inform to operate with a NICE Interaction Management (including NICE Perform and NICE Perform eXpress) data source, you do **NOT** need to define the Interaction Center within the data source.
- You **CANNOT** add NICE Perform, NICE Perform eXpress, NICE Interaction Management and NiceLog loggers only audio data sources. Existing data sources are still supported in the system and can be edited etc.
- Data sources can be added as a legacy data source e.g. NICE Recording/NICE Inform Recorder. For more information regarding legacy data sources, refer to adding a legacy data source (see page 20).

To add a new data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Data Sources** node.
3. Click the **Add** button and select the **Add Data Source** option from the drop down menu. The **Data Source Wizard** opens at the **Welcome** screen.
4. Click the down arrow and select the data source type to be added.
5. Click the **Next** button to continue and the **General Details** screen is presented.

6. Enter the details for the data source in the text boxes provided. The options can vary depending on what data source type you are adding. Refer to the table below for all potential options and what data sources they apply to.

NOTE: If you are adding a CAD data source, refer to the *NICE Inform CAD GDS Installation Guide* on ExtraNICE or on your CAD installation media for install instructions.

7. Once the details have been entered for the data source, click the **Next** button.

8. If you are adding a NICE Recording/NICE Inform Recorder data or NiceCLS data source, the relevant **Additional Details** screen is presented. If not, proceed to step **9.**

NICE Recording/NICE Inform Recorder Additional Details

– **Core API username** - enter the username for the account that is used to access recordings on the recorder in the text box provided.

– **Core API password** - enter the password for the account that is used to access recordings on the recorder in the text box provided.

NOTE: This is the username and password of the recorder account that is used by the Core API.

– **Core API base address** - a field that for the majority of cases should be left as the default setting (CoreApi). Only change if you have been advised that the address is different from the default.

– **Core API port** - a field that for the majority of cases should be left as the default setting (7500). Only change if you have been advised that the port is different from the default.

– **Use X.509 certificate authentication** - when checked, the Core API will be used with secured connections. Two further options are provided for you to select the required Core API certificates:

  ➢ **Core API client certificate** - click the drop down arrow and select the required client certificate for the Core API from the list.

  ➢ **Core API server certificate** - click the drop down arrow and select the required server certificate for the Core API from the list.

– **Use Media Vault for location** - When checked, NICE Inform will use a Media Vault to recover any location data (e.g. ANI/ALI). Click the drop down arrow and select the required Media Vault data source from the list for location data.

NiceCLS 8.9/9.0 Additional Details

– Check the **Use File Retrieval Service** to access files for the data source using the File Retrieval Service. Enter the following:

  ➢ **Network address** - enter the hostname or IP address of the system you want to retrieve data source files from.

– Check the **Use alternative location server** box to specify an alternative location server (e.g. ANI/ALI) for this NiceCLS data source. Enter the following details:

- **Network address** - enter the hostname or IP address of the alternative location server in the text box provided.
- **Authentication** - select either **Windows Authentication** if you use Windows authentication to connect to the alternative location server or **SQL Server Authentication** if you use Microsoft SQL Server to connect to the alternative location server.

NOTE: Selecting the **Windows Authentication** option disables the **SQL username** and **SQL password** options.

- **SQL username** - enter the SQL username for the alternative location server in the text box provided.
- **SQL password** - enter the SQL password for the alternative location server in the text box provided.

9. Click the **Next** button to continue.
10. At the **Summary** screen, check that the details for the data source are correct. Once satisfied, click the **Add** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.
11. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

Table 6-1: Data source General details (except CAD)

Detail	Description	Applicable data sources
Label	The label (name) for the data source.	All data sources
Network address	The hostname or IP address for the new data source.	All data sources
Port	The port used to connect to the data source. NOTE: If this is set as a legacy data source, you **MUST** ensure the port number is set to 8086.	Media Vault
Hub account name	The hub account name for the NICE Inform hub data source.	NICE Inform hub
User account name	The user account name for the data source.	Media Vault
User account password	The user account password for the data source.	Media Vault
SQL username	The SQL username allocated by the System Administrator.	NiceCLS 8.9/9.0 NiceLog audio NICE Interaction Management/NICE Perform/NICE Perform eXpress VPI Audio Logger

Detail	Description	Applicable data sources
SQL password	The SQL password allocated by the System Administrator.	NiceCLS 8.9/9.0 NiceLog audio NICE Interaction Management/NICE Perform/NICE Perform eXpress VPI Audio Logger
MySQL username	The MySQL database username. This is often referred to as the Recorder account.	NICE Recording/NICE Inform Recorder
MySQL password	The MySQL database password. This is often referred to as the Recorder account.	NICE Recording/NICE Inform Recorder
Instance name	Check the **Use a named SQL Server instance** box and enter the SQL instance name used to host the NiceCLS database in the text box provided.	NiceCLS 8.9/9.0 NiceLog audio VPI Audio Logger
Category	This setting defines how the Media Vault data source collects its results. For example, if it is a text category, the results are grouped into text conversations.	Media Vault
Driver source	The driver source defines which specific driver the Media Vault data source collects results for.	Media Vault
Use Media Vault for Location	When checked, NICE Inform will use a Media Vault to recover any location data (e.g. ANI/ALI).	NICE Recording/NICE Inform Recorder
Media Vault drop down box	When **Use Media Vault for Location** is checked, this drop down box will display a list of Media Vault data sources with category equal to the location data (e.g. ANI/ALI). Select the one you wish to use from the list.	NICE Recording/NICE Inform Recorder

6.2 Adding a legacy data source

NOTE: Specific terminology is used when navigating the tree pane to add a legacy data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The procedure when adding a legacy data source is identical to that when adding a data source. For what all the settings mean when adding your data source, refer to the Adding a data source (see page 17) section for help.

Important legacy data source information:

- Marking a data source as legacy will subsequently restrict NICE Inform to retrieving only historic recordings from that data source that were recorded up to 90 days after making that change. recordings that are more than 90 days after marking a data source as legacy will not be accessible from that data source.
- Once the data source has been added, the node in the tree view changes  to show that it is now in a legacy state.
- Once set as a legacy system, when editing the data source you **CANNOT** remove its legacy status. Any recordings that began prior to when the data source was made legacy and ended after the legacy date are still returned.

- You **CANNOT** add the following as legacy data sources:
  - CAD data sources
  - NICE Perform data sources
  - NICE Perform eXpress data sources
  - NICE Interaction Management data sources
  - NiceLog audio data sources

To add a legacy data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Data Sources** node.
3. Click the **Add** button and select the **Add Legacy Data Source** option from the drop down menu. The **Data Source Wizard** opens at the **Welcome** screen.

NOTE: Refer to the Adding a data source (see page 17) section for help as the configuration onwards is identical with one exception for audio data sources e.g. NICE Recording/NICE Inform Recorder data sources. Once you have configured the settings on the **General Details** screen and have clicked the **Next** button, a message is presented informing you that marking this data source as legacy data source will subsequently restrict NICE Inform to retrieving only historic recordings from that data source that were recorded up to 90 days after making that change. Click the **Yes** button to confirm that you have understood this limitation and to continue with the wizard.

6.3 Data source servers

NOTE: Specific terminology is used when navigating the tree pane to view details of all data sources that have been configured within NICE Inform. For help with this terminology, refer to Tree structure terminology (see page 4).

To view the details of all the data sources configured within NICE Inform:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node**.**
2. Select the **Data Sources** node.
3. Click the **Servers** tab. The **Servers** page is presented.

The Servers page displays (in the form of a table) all the data sources that have been configured in NICE Inform.

The Servers table displays the following information:

NOTE: Apart from the i column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 6-2: Data source servers

Column	Description
i	An icon is displayed if there is an error connecting to a data source.
Label	The label (name) created for the data source.
Network address	The hostname or IP address of the data source.
System type	The type of data source e.g. NiceCLS.
Replication server	The name and whether this is a backup of this data source that has been configured to be a replication server. For help adding a replication server, refer to NiceCLS settings (see page 84). NOTE: The Replication server column is **ONLY** applicable to NiceCLS NLS audio data sources.
Legacy date	The date when the source legacy state elapses. For information about legacy data sources, refer to Adding a data source (see page 17). NOTE: This is **ONLY** applicable to NICE Recording/NICE Inform Recorder, NLS audio and NICE Interaction Management data sources.

To view the data source, double-click the data source in the table.

6.4 Data source resources

NOTE: Specific terminology is used when navigating the tree pane to view details of all data sources that have been configured within NICE Inform. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To view resources for all data sources configured within NICE Inform.

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node**.**
2. Select the **Data Sources** node.
3. Click the **Resources** tab. If the **Resources** page is empty, click the **View all resources** hyperlink to display the resources associated with the selected node in the tree.
4. The **Resources** table is now presented.

The Resources page displays (in the form of a table) all the resources for all data sources that have been configured in NICE Inform.

The Resources table displays the following information:

NOTE: Apart from the column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 6-3: Data source resources

Column	Description
	The resource type icon.
Data source	The data source by which the resource belongs.
Label	The label (name) of the resource.
Reference type	The type of reference of the underlying data source e.g. Channel.
Reference	The identifier for the underlying resource which is linked to the Reference type.
Pair	The label (name) of the paired resource.
Pair priority	If the resource has a pair, the priority indicates whether it is the Primary or Secondary of the pair.
Resource type	The type of resource used for the data source.

If (in the Resources table) you require to reference directly to the channels on the logger, you need **Maintenance mode** enabled. To enable this mode, refer to Editing site details (see page 10).

NOTE: Maintenance mode is **ONLY** applicable for audio based data sources e.g. NLS audio and NICE Interaction Management.

6.5 Licensing resources

NOTE: Specific terminology is used when navigating the tree pane to license resources. For help with this terminology, refer to Tree structure terminology (see page 4).

Licensing resources is **ONLY** available if your system is licensed for NICE Inform Lite.

You can **ONLY** select NLS audio, NiceLog loggers only audio, NICE Interaction Management and NICE Recording/NICE Inform Recorder data source resources for licensing. All other data sources are **NOT** supported if your system is licensed for NICE Inform Lite.

Once the resources have been imported for the data source, you must ensure that you select which resources you require to be available for other NICE Inform applications. To do this you need to license these resources. At the top of the corresponding Resources page, the number of resources that have been imported and then the number that are licensed are displayed.

This is provided so that you know how many of the total resources you have licensed and how many licenses you have remaining.

NOTE: Resources from legacy data sources are always shown as licensed and do not use your available licensed resource count. Therefore, they are not available for selection when licensing resources.

To license resources:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node**.**

2. Do one of the following:

   – Select the **Data Sources** node and click on the **Resources** tab in the right pane. If the **Resources** page is empty, click the **View all resources** hyperlink to display the resources.

   – Expand the **Data Sources** node and then select the required **NLS audio data source** node or **NICE Interaction Management data source** node. Click the **Resources** tab and the **Resources** page is presented.

NOTE: You can also select which resources you require to license in the **Resources** page within the **Site** node.

3. Click the **License** button and the **Resource Selection** dialog is presented.

4. Select the required resources from the **Available resources** list, which lists all the resources available in the system using the normal selection methods.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

6.6 Licensing maintenance resources

NOTE: Specific terminology is used when navigating the tree pane to license maintenance resources. For help with this terminology, refer to Tree structure terminology (see page 4).

You can **ONLY** select NICE Recording/NICE Inform Recorder, NLS audio, NiceLog loggers only audio or NICE Interaction Management resources for licensing.

Once you have imported the resources for the data source, you may require to remove the license for certain resources in order to remove them from your license count. To do this you need to un-license these resources. At the top of the corresponding Resources page, the number of maintenance resources that have been imported and then the number that are licensed are displayed.

This is provided so that you know how many of the total maintenance resources you have licensed and how many licenses you have remaining.

NOTE: Resources from legacy data sources are always shown as licensed and do not use your available licensed resource count. Therefore, they are not available for selection when licensing maintenance resources.

To license maintenance resources:

1. In the tree pane, expand the **Recording Systems** node and then select the **Site** node**.**

2. Click on the **General** tab and click **Enable maintenance mode on next login**.

3. Log out and then back in to NICE Inform.

4. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node

5. Do one of the following:

   – Select the **Data Sources** node and click on the **Resources** tab in the right pane. If the **Resources** page is empty, click the **View all resources** hyperlink to display the resources.

   – Expand the **Data Sources** node and then select the required **NICE Recording/NICE Inform Recorder data source** node **NLS audio data source** node or **NICE Interaction Management data source** node. Click the **Resources** tab and the **Resources** page is presented.

NOTE: You can also select which maintenance resources you require to license in the **Resources** page within the **Site** node.

6. Click the **License** button and the **Resource Selection** dialog is presented.

7. Select the required maintenance resources from the **Available resources** list, which lists all the maintenance resources available in the system using the normal selection methods.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

6.7 NLS audio settings

NOTE: Specific terminology is used when navigating the tree pane to configure NLS audio settings. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To configure NLS audio settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Select the **Data Sources** node.

3. Click the **NLS** tab and the **NLS** page is presented.

NOTE: The NLS tab is **ONLY** displayed if you have a NiceCLS data source added to the system.

The following sections are available:

- CLS Call Data Retention (see page 26)
- Logger call retention (see page 28)
- Logger Online Storage (see page 28)
- Media Library Servers (see page 29)

6.7.1 CLS Call Data Retention

Under the Data Retention section, the CLS Call Data Retention feature enables you to delete any NiceCLS data (including NiceCLS calls, Location data (e.g. ANI/ALI and annotations) older than a configurable retention period.

Here you can add, edit and remove any servers with the Data Retention Service installed.

Adding a new server

▶ To add a new server:

1. Click the **Add** button and the **Add Server** dialog is presented.
2. Do one of the following:
   - Click the **Network address** drop down arrow and select the server from the list.
   - Enter the IP address or hostname for the server in the text box provided.
3. Specify the port to connect to the server in the **Port** text box.
4. Click the **OK** button and the server is added to the **Servers** table.
5. Click the **Save** button.

The columns displayed in the Servers table are:

NOTE: Apart from the ℹ column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 6-4: Data retention servers table columns

Column	Description
ℹ	An ⊗ icon is displayed only if the data retention server is paused or needs configuring.
Label	The label (or name) entered for the data retention server.
Network Address	The network address (or hostname) for the data retention server.
Deletion status	The data retention deletion status e.g. 'enabled' or 'paused'.

Editing server data retention settings

Once the added data retention server has been saved, you can edit the server settings.

NOTE: You **CANNOT** edit the data retention server if the server is uncontactable.

To edit the server data retention settings, select the server or instance database from the **Servers** table and click the **Edit** button. The **Edit Server** dialog is presented and is divided into the following sections:

NOTE: The network address is grayed out and is displayed as a reference only.

Configuration Table Location

This section is only available for editing if this is the first time the data retention server is connected to. If this is the first time, then these use the following options to set the SQL instance and database that the server needs to point to in order to install the configuration table:

- **SQL Instance** - select the SQL instance that the data retention server needs to point from the drop down list.
- **Database** - select the database on the SQL instance that the configuration table is to be installed from the drop down list.

NOTE: A table is installed in this database within this SQL instance for configuration settings.

If the server has previously been configured, these two options are grayed out.

Settings

This section is where you edit the settings for the data retention server. The options settings are available:

- **Retention (Days)** - enter the number of days (in the associated text box) for how long data is kept for.
- **Run interval (hours) -** enter the number of hours (in the associated text box) for how often the system tries to perform a deletion.
- **Batch size -** enter the number (in the associated text box) for the maximum number of calls plus location records (e.g. ANI/ALI) that can be deleted from any one table at one time.
- **Warning threshold** - enter the warning threshold (in the associated text box) for the number of undeleted calls plus location records (e.g. ANI/ALI) that when exceeded, an SNMP trap is raised.
- **Pause deletion on all Instances** - check this box and the data retention service is paused on all instances on the data retention server.
- **Apply to all data retention servers** - check this box and all the settings you have configured now apply to all data retention servers.

Instances

The Instances section is primarily designed to provide a detailed view of each SQL instance connected to the data retention server.

There are two tables within this section:

- **Instances table.** The columns displayed in the Instances table are:

NOTE: Each column can be sorted in descending or ascending order by clicking the column heading. You can also reorder the columns by dragging them to the required location.

Table 6-5: Instances table columns

Column	Description
SQL Instance	The SQL Instance name.
Database	The database on the SQL instance that the configuration table is installed on.
Pause Deletion	Check the box to pause deletion on the SQL Instance.

- **Instance Details table**. Once you have selected an SQL instance from the Instances table, its details are displayed in this table. The columns displayed in the Instance Details table are:

Table 6-6: Instance details table columns

Column	Description
Deletion status	The deletion status for this SQL instance e.g. 'enabled' or 'paused'.
Current table	The current call table that database rows are being deleted from.
Expired rows deleted at last run	How many rows (over all tables) that have been deleted during the last deletion run.
Expired rows awaiting deletion	How many rows left to be deleted (from all tables) after the last deletion run.
Last deletion time	The last time a deletion run was performed.
Oldest call	The oldest call in the database.
Oldest ANI/ALI	The oldest ANI/ALI call in the database.

Once you have configured all the data retention settings, click the **OK** button followed by the **Save** button.

Removing a server or SQL instance

- To remove a server or SQL instance:

1. Select the server or SQL instance from within the **Servers** table.
2. Click the **Remove** button and a confirmation message is presented.
3. Click the **Yes** button to confirm the deletion followed by the **Save** button.

6.7.2 Logger call retention

This section provides the functionality of being able to perform an age-based deletion of the calls from the logger. Select one of the following:

- **Do not automatically delete calls based on age** - calls **CANNOT** automatically be deleted irrespective of how long they have been on the logger.
- **Delete calls older than** - enter the number of days after which calls are deleted on the logger by either entering the number into the available text box or by using the provided up/down arrows.

NOTE: Calls that have been on the logger for longer than the number of days set get deleted automatically.

6.7.3 Logger Online Storage

Within this section you can set an alarm when a percentage of available space on a logger has been reached by checking the **Raise an alarm when the contents of the online storage has reached** box.

Once checked, set a percentage that when any logger reaches the percentage, a storage alarm is raised. Set the percentage of available space into the text box provided. Entry is assisted by using the up/down arrows.

This alarm can be viewed in the NICE Inform Audit application.

6.7.4 Media Library Servers

The Media Library Servers section is where you can add, edit and remove Media Library servers.

Once you have added your Media Library servers they can be configured for use by each NLS Audio data source (NiceCLS). For help configuring a Media Library server to a NLS Audio data source, refer to NiceCLS settings (see page 84).

Adding a Media Library server

- To add a new Media Library server:

1. Click the **Add** button. The **Add Server** dialog is presented.
2. Enter the following details in the text boxes provided:
   - **Label** - enter a label (name) for the Media Library server.
   - **Network address** - enter the Network address for the Media Library server.
3. Click the **OK** button followed by the **Save** button. The new Media Library server is added to the **Servers** table.

Editing a Media Library Server

- To edit a Media Library server:

1. Within the Servers table, do one of the following:
   - Double-click the required Media Library server.
   - Select the required Media Library server and click the **Edit** button.
2. The **Edit Server** dialog is presented. Edit the following information:
   - **Label** - edit the name (label) for the Media Library server in the text box provided.
   - **Network address** - edit the hostname or IP address for the Media Library server in the text box provided.
3. Click the **OK** button followed by the **Save** button to confirm the changes you have made.

Removing a Media Library Server

- To remove a Media Library server:

1. Select the required Media Library server from within the **Servers** table.

2. Click the **Remove** button. A message is presented informing you that any NLS Audio system that has this Media Library server assigned reverts back to its default server instead. Click the **OK** button.

3. Click the **Save** button.

6.8 Global NIR recording schedules

NOTE: Specific terminology is used when navigating the tree pane to configure Global NICE Inform Recorder (NIR) recording schedules. For help with this terminology, refer to Tree structure terminology (see page 4).

The Global NIR Recording Schedule page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

Use the Global NIR Recording Schedule page to define which hours of every day in the week the channel will be activated for recording for each supported NICE Inform Recorder data source in the system.

NOTE: In order to make any changes to the schedule rules, you **MUST** have the **Configure recording systems** privilege assigned to you by a NICE Inform Administrator.

To configure the recording schedule for an individual NICE Inform Recorder, refer to Recording schedules (see page 70).

- To configure global NIR recording schedules:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Select the **Data Sources** node.

3. Click the **Global NIR Recording Schedules** tab and the **Global NIR Recording Schedules** page is presented.

The Global NIR Recording Schedules page displays (in the form of a table) all the recording schedule rules that have been configured for all supported NICE Inform Recorder data sources. The Global NIR Recording Schedule table displays rules entered within the **Channel Schedule** dialog (refer to Adding and editing a global recording schedule rule (see page 32)). The following information is displayed:

NOTE: Each column can be reordered by dragging it to the required location.

Table 6-7: Recording schedule rules

Column	Description
	Rule status information. Blank if the rule has not been saved or has been saved successfully. An icon is displayed if the following occurs: ▪ If a saved rule has failed to be added or updated successfully on every applicable date source. ▪ If a deleted rule has failed to be removed successfully from every applicable data source.
Valid from	The date/day the rule is valid from. This can either be a date, a day of the week or daily.
Valid until	The date/day the rule is valid until. This can either be a date, a day of the week or daily.
Start time	The start time for the rule.
Stop time	The end time for the rule.

The following rules apply within the Global NIR Recording Schedule table:

- Schedule Rules are in order of decreasing significance:
  - Schedule rules that are set using a date range are more significant than ones set for specific days of the week which in turn are more significant than ones set as daily.
  - To avoid multiple scheduled rules being applied on the same channel at the same time, the scheduled rule with the highest significance takes precedence.

Rule status

To display additional status information for a rule, select the rule in the table and click the + button. The following additional information may be displayed for the rule:

- If the rule has been successfully applied to all recording systems, the following text is displayed: *This rule has been successfully applied to every compatible recording system*
- If a new rule has been added, but the new rule could not be applied to all recording systems, the following text is displayed: *This rule could not be applied to every compatible recording system. The following recording systems require updating: <data source name…>*
- If a rule has been modified, but the modification could not be applied to all recording systems, the following text is displayed: *This rule could not be applied to every compatible recording system. The following recording systems require updating: <data source name…>*
- If a rule has been deleted, but the rule could not be removed from all recording systems, the following text is displayed: *This rule could not be removed from every compatible recording system. The following recording systems require updating: <data source name…>*
- If a rule has been added but not saved yet, then no text is displayed.

NOTE: Click the − button to collapse the rule status messages.

Available buttons

The following buttons are available:

- **Details** - enables access to check scheduled rules to ensure they have been applied correctly on the applicable recording systems (refer to Checking global schedule rules (see page 34)).
- **Retry** - for an individual (selected) rule in the Recording schedule rules table, use when a save, edit or delete action for the rule has not been applied to every applicable recording system.
- **Retry All** - for multiple (selected) rules in the Recording schedule rules table, use when a save, edit or delete action for the rule has not been applied to every applicable recording system.

NOTE: The **Retry** and **Retry All** buttons are also available within in the Global Rule States dialog (refer to Checking global schedule rule states (see page 34)).

- **Add** - enables access to add a rule (refer to Adding and editing a global recording schedule rule (see page 32)).
- **Edit** - enables access to edit a rule (refer to Adding and editing a global recording schedule rule (see page 32)).
- **Delete** - deletes the selected rule (refer to Deleting a global recording schedule rule (see page 33)).

6.8.1 Adding and editing a global recording schedule rule

NOTE: Specific terminology is used when navigating the tree pane to add and edit a global recording schedule rule. For help with this terminology, refer to Tree structure terminology (see page 4).

To add or edit a global recording schedule rule:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Data Sources** node.
3. Click the **Global NIR Recording Schedules** tab and the **Global NIR Recording Schedules** page is presented.
4. Do one of the following:
   - When adding a new rule, click the **Add** button.
   - When editing a rule, select the rule in the **Global NIR Recording Schedule** table and double click or click the **Edit** button.

NOTE: In both cases, the **Channel Schedule** dialog is presented.

5. Select one of the following options from within the **Validity** section:
   - **Daily** - the rule will rule daily.

- **Selected days** - configure the following options:
  - **Valid from** - click the down arrow and select the required day of the week from the list that the rule will start.
  - **Valid until** - click the down arrow and select the required day of the week from the list that the rule will end.
- **Date range** - configure the following options:
  - **Valid from** - enter a date that the rule will start from. Date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).
  - **Valid until** - enter a date that the rule will end. Date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).

6. Set the following options from within the **Schedule** section:
   - **Start time** - enter the start time for the rule in the text box provided. This must be entered as an hour using the 24 hour clock format.
   - **Stop time** - enter the stop time for the rule in the text box provided. This must be entered as an hour using the 24 hour clock format.

NOTE: The start time must be before the stop time as if not, a warning icon is displayed. Hover the cursor over the icon and a tooltip is displayed providing you more information.

7. Click the **OK** button followed by the **Save** button.

6.8.2 Deleting a global recording schedule rule

NOTE: Specific terminology is used when navigating the tree pane to delete a global recording schedule rule. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a global recording schedule rule:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Data Sources** node.
3. Click the **Global NIR Recording Schedules** tab and the **Global NIR Recording Schedules** page is presented.
4. Select the required rule for deletion from the **Global NIR Recording Schedule** table.
5. Click the **Delete** button followed by the **Save** button.

6.8.3 Checking global schedule rule states

NOTE: Specific terminology is used when navigating the tree pane to check global schedule rule states. For help with this terminology, refer to Tree structure terminology (see page 4).

- To check global schedule rule states for all compatible NICE Inform Recorder data sources:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Data Sources** node.
3. Click the **Global NIR Recording Schedules** tab and the **Global NIR Recording Schedules** page is presented.
4. Click the **Detail** button and the **Global Rule States dialog** is presented. All supported NICE Inform Recorder data sources are listed with a corresponding rule status.
5. For any NICE Inform Recorder data sources that have a rule status of 'failed', do one of the following:
   - For individual data sources, select it in the list and click the **Retry** button. An attempt is made to reapply any failed rules.
   - For multiple data sources, click the **Retry All** button and an attempt is made to reapply any failed rules across all the recording systems.
6. Once completed, click the **OK** button.

6.9 Global NIR Settings

NOTE: Specific terminology is used when navigating the tree pane to configure global NIR settings. For help with this terminology, refer to Tree structure terminology (see page 4).

The Global Settings page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

Use the Global Settings page to set VOX threshold dB value for all channels across all NIR data sources.

NOTE: In order to make any global setting changes, you **MUST** have the **Configure recording systems** privilege assigned to you by a NICE Inform Administrator.

To configure the VOX threshold for an individual NICE Inform Recorder, refer to Editing a channel (see page 63)

- To configure global NIR settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Data Sources** node.
3. Click the **Global Settings** tab and the **Global Settings** page is presented.
4. Enter the VOX dB value within the range between -13 dB and 9 dB in the **VOX Threshold dB** text box. Entry is assisted by using the up/down arrows.
5. Click the **Apply** button. The **Setting Status** window provides feedback per NIR on the results of attempting to apply the VOX threshold setting.

7 NICE Recording/NICE Inform Recorder data sources

The functions when configuring and using a NICE Recording data source for replay is the same as when configuring and using a NICE Inform Recorder data source.

In addition, the functions when configuring a NICE Recording eXpress data source are identical to that of a NICE Recording data source. Please refer to the instructions for a NICE Recording data source.

This section covers all the available functions when configuring your NICE Recording/NICE Inform Recorder data sources:

- Editing a NICE Recording/NICE Inform Recorder data source (see page 37)
- Deleting a NICE Recording/NICE Inform Recorder data source (see page 39)
- Importing NICE Recording/NICE Inform Recorder resources from a data source (see page 39)
- Importing resources from a CSV file (see page 40)
- Exporting resources as a CSV file (see page 41)
- Adding a NICE Recording/NICE Inform Recorder resource manually (see page 42)
- Editing and deleting a NICE Recording/NICE Inform Recorder resource (see page 43)

Configuring NICE Recording data sources

This section lists the main topic areas that cover the configuration of compatible NICE Recording data sources.

NOTE: NICE Inform Recorder data source configuration is **NOT** supported.

- Recording schedules (see page 70)
- Global settings (see page 47)
- Recorders (see page 51)
- Location settings (see page 55)
- Content rules (see page 58)
- Alarms (see page 65)
- Record/Censure list (see page 67)

A direct connection is made to the NICE Recording data source in order to make a setting change. When this occurs, a Progress dialog is displayed refreshing the status. Do one of the following:

- Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the refresh process completes, unless an error has occurred.
- Once the refresh process is complete, click the **Close** button to close the dialog.

7.1 Editing a NICE Recording/NICE Inform Recorder data source

NOTE: Specific terminology is used when navigating the tree pane to edit a NICE Recording/NICE Inform Recorder data source data source. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit a NICE Recording/NICE Inform Recorder data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Recording/NICE Inform Recorder data source** node.
3. Click the **General** tab and the **General** page is presented.
4. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - the name of the data source.
   - **MySQL username** - the MySQL database username. This is often referred to as the Recorder account.
   - **Network address** - the hostname or IP address of the data source.
   - **MySQL password -** the MySQL database password (this is often referred to as the Recorder account):
     (1) Click the **Set** button. The **Set MySQL Password** dialog is presented.
     (2) Change the MySQL password in the **Password** text box, and then repeat in the **Confirm password** text box.
     (3) Click the **OK** button. If there are no errors, the dialog closes.
   - **Screen satellite network address** - the screen satellite network address.
   - **Screen playback port** - the screen playback port. Only change this if you require changing the port from the default setting.

NOTE: The Screen satellite network address and Screen playback port options are only available if your NICE Recording/NICE Inform Recorder data source data source supports screen recording.

   - **Core API username** - the username for the account that is used to access recordings on the recorder.
   - **Core API password**:

NOTE: This is the username and password of the recorder account that is used by the Core API.

     (1) Click the **Set** button. The **Set Core API password** dialog is presented.

(2) Change the password for the account that is used to access recordings on the recorder in the **Password** text box, and then repeat in the **Confirm password** text box.

(3) Click the **OK** button. If there are no errors, the dialog closes.

- **Core API base address** - a field that for the majority of cases should be left as the default setting (CoreApi). Only change if you have been advised that the address is different from the default.
- **Core API port** - a field that for the majority of cases should be left as the default setting (7500). Only change if you have been advised that the port is different from the default.
- **Legacy system** - Check the **Legacy system** box to set this data source to be in a legacy state from this point in time onwards. Once set, searching for any recordings after this date on any resources associated with this data source is not permitted. You can still search for recordings prior to this legacy date. Once set, the node in the tree pane for this data source changes  to show that it is now in a legacy state.

NOTE: If the Legacy system box is grayed out this data source has already been set as legacy.

Any recordings that began prior to when the data source was made legacy and end after the legacy date are still returned.

- The **Recorder server version**, **Core API server version**, **Core API client version** and the **Central Archive status** read-only labels are provided for your information only. If the text **Not available** is displayed is likely to be caused by a certification issue. For more information, refer to the *NICE Inform Installation Guide* - *Appendix J*.
- **Use Media Vault for Location** - when checked, NICE Inform will use a Media Vault to recover any location data (e.g. ANI/ALI). Click the drop down arrow and select the required Media Vault data source from the list for location data.
- **Use X.509 certificate authentication** - when checked, the Core API will be used with secured connections. Two further options are provided for you to select the required Core API certificates:
  - **Core API client certificate** - click the drop down arrow and select the required client certificate for the Core API from the list.
  - **Core API server certificate** - click the drop down arrow and select the required server certificate for the Core API from the list.

On completion, click the **Save** button.

NOTE: If you checked the **Legacy system** box, you are presented with a confirmation dialog confirming your selection. Click the **Yes** button to continue.

7.2 Deleting a NICE Recording/NICE Inform Recorder data source

NOTE: Specific terminology is used when navigating the tree pane to delete a NICE Recording/NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

All resources associated with this NICE Recording/NICE Inform Recorder data source are also deleted and therefore **CANNOT** be searched against.

▸ To delete a NICE Recording/NICE Inform Recorder data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Recording/NICE Inform Recorder data source** node for deletion.
3. In the button bar, click the **Delete data source** ✕ button. A confirmation message is presented confirming the deletion.
4. Click the **Yes** button.

The NICE Recording/NICE Inform Recorder data source is removed from the tree pane.

7.3 Importing NICE Recording/NICE Inform Recorder resources from a data source

NOTE: Specific terminology is used when navigating the tree pane to import NICE Recording/NICE Inform Recorder resources from a data source. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To import NICE Recording/NICE Inform Recorder resources from a data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Recording/NICE Inform Recorder data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Select the **Read the resource information from the data source** radio button.
6. Click the **Next** button and the **Specify Mappings** screen is presented.
7. The following options are available:

- **Enable automatic import of resources** - check this box and the resources are automatically imported periodically based on the settings as configured on the NICE Recording/NICE Inform Recorder settings (see page 45) page.
- **Resource type** - select the predominant resource type for the Recorder from the drop down list.
- **Free seating type** - select the free seating type from the drop down list. Available free seating types are associated with the resource type.

NOTE: These Resource type and Free seating type settings are the default options on this screen and are configured within the NICE Recording/NICE Inform Recorder settings (see page 45) page.

The free seating type option is **NOT** available for the Generic Audio resource type.

If the NICE Recording data source supports screen recording, when importing telephony resources with the free seating type set to **Agent** a screen resource for each telephony resource is imported automatically.

8. Click the **Import** button to continue.
9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.
10. Do one of the following:
    - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
    - Once the import process is complete, click the **Close** button to close the dialog.
11. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

7.4 Importing resources from a CSV file

NOTE: Specific terminology is used when navigating the tree pane to import resources from a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Importing resources from a CSV file is the same procedure for all data sources that support this function.

To import resources from a CSV (Comma Separated Value) file:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.

4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.

5. Select the **Read the resource information from a file** radio button.

6. When importing CAD resources **ONLY**, select one of the following options:

NOTE: For all other data source types other that CAD data sources, skip to step 7.

   - **Keep the existing resources** - existing resources are kept during the import process.
   - **Overwrite the existing resources** - resources are overwritten during the import process.

7. Click the **Next** button and at the **Select File** screen, do one of the following:

   - Click the **Browse** button and browse to the folder location where the CSV file is stored. Once the CSV file has been located, click the **Open** button.
   - Enter the folder location for the CSV file in the text box provided.

8. Click the **Import** button.

9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.

10. Do one of the following:

   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
   - Once the import process is complete, click the **Close** button to close the dialog.

11. At the **Wizard Complete** screen click the **Finish** button to exit the wizard.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

7.5 Exporting resources as a CSV file

NOTE: Specific terminology is used when navigating the tree pane to export resources as a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Exporting resources as a CSV file is the same procedure for all data sources that support this function.

▸ To export a resources file in CSV (Comma Separated Value) file format:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **Data source** node.

3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Export** button and the **Export Resources** dialog is presented.
5. Click the **Browse** button and browse to the location to export the resources.
6. Enter the required **File name** ensuring that the **File type** is set to **CSV** and click the **Save** button.
7. On completion, click the **OK** button.
8. A progress dialog is presented providing a summary of the resources that are being exported.
9. Do one of the following:
   – Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the export process completes, unless an error has occurred.
   – Once the export process is complete, click the **Close** button to close the dialog.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

7.6 Adding a NICE Recording/NICE Inform Recorder resource manually

NOTE: Specific terminology is used when navigating the tree pane to add a NICE Recording/NICE Inform Recorder resource manually. For help with this terminology, refer to Tree structure terminology (see page 4).

To add a NICE Recording/NICE Inform Recorder resource manually:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Recording/NICE Inform Recorder data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Click the **Add** button. The **Add Resource** dialog is presented.
5. Enter the following details and where applicable use the text boxes provided:
   – **Resource type** - click the down arrow and select the required resource type so that the NICE inform applications can group resource by type (Telephony, Radio, Generic Audio, Screen or Maintenance).
   – **Reference** - click the down arrow and select the required reference type for the underlying resource (Channel, Agent, Extension, Talk Group or Radio). Click the **Browse** ... button to display the **Enter Resource Reference** dialog. This dialog is only available if the NICE Recording/NICE Inform Recorder resource is

set to **Channel**. It shows the logger ID for all loggers associated with the NICE Recording/NICE Inform Recorder data source. The fields are editable so you can change the Logger ID and Channel number details.

- **Label** - a unique meaningful name that identifies the resource.
- **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select the resource to pair with.

a. Select one of the following:
   - **Recording systems** - resources are listed by sites and data sources.
   - **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

- **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary resource of the pairing. Otherwise, it becomes the secondary resource and the other resource in the pair becomes the primary.

6. On completion, click the **Add** button to add the resource.

NOTE: The **Add Resource** dialog remains open to enable you to add further resources if required. Once finished, click the **Close** button to close the dialog.

7.7 Editing and deleting a NICE Recording/NICE Inform Recorder resource

NOTE: Specific terminology is used when navigating the tree pane to edit and delete a NICE Recording/NICE Inform Recorder resource. For help with this terminology, refer to Tree structure terminology (see page 4).

Editing a NICE Recording/NICE Inform Recorder resource

▶ To edit a NICE Recording/NICE Inform Recorder resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NICE Recording/NICE Inform Recorder data source** node.

3. Click the **Resources** tab and the **Resources** page is presented.

4. Do one of the following:

   – Double-click the required resource.

   – Select the required resource and click the **Edit** button.

NOTE: In both cases, the **Edit Resource** dialog is presented.

5. Edit one or more of the following and where applicable use the text boxes provided:

   – **Resource type** - click the down arrow and select the required resource type so that the NICE inform applications can group resource by type (Telephony, Radio, Generic Audio, Screen or Maintenance).

   – **Reference** - click the down arrow and select the required reference type for the underlying resource (Channel Agent, Extension, Talk Group or Radio). Click the **Browse** ... button to display the **Enter Resource Reference** dialog. This dialog is only available if the NICE Recording/NICE Inform Recorder resource is set to Channel. It shows the logger ID for all loggers associated with the NICE Recording/NICE Inform Recorder data source. The fields are editable so you can change the Logger ID and Channel number details.

   – **Label** - a unique meaningful name that identifies the resource.

   – **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select the resource to pair with.

   a. **Select one of the following:**

      ➢ **Recording systems** - resources are listed by sites and data sources.

      ➢ **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

   b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

   – **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary resource of the pairing. Otherwise, it becomes the secondary resource and the other resource in the pair becomes the primary.

6. On completion, click the **Save** button. Any changes made to the NICE Recording/NICE Inform Recorder resource are now saved.

NOTE: Any users that require access to this resource have to log out and back in again to NICE Inform once the change to the resource has been made.

Deleting NICE Recording/NICE Inform Recorder resources

- To delete NICE Recording/NICE Inform Recorder resources:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Recording/NICE Inform Recorder data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Select the required resource or resources (by using Microsoft Windows standard Shift and Ctrl methods) and click the **Delete** button. A message is presented confirming the deletion.
5. Click the **Yes** button.

The resources are now deleted.

NOTE: Before deleting and removing resources, ensure that any required voice recordings held on the resources have been saved as incidents or WAV files. You **CANNOT** access the recordings once the resources have been removed.

7.8 NICE Recording/NICE Inform Recorder settings

NOTE: Specific terminology is used when navigating the tree pane to configure NICE Recording/NICE Inform Recorder settings. For help with this terminology, refer to Tree structure terminology (see page 4).

The Settings page enables you to set resource mappings for the NICE Recording/NICE Inform Recorder data source so they are automatically populated when you import resources (refer to Importing NLS audio resources from a data source (see page 78)).

- To configure NICE Recording/NICE Inform Recorder settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node**.**
2. Select the **Data Sources** node and then select the required NICE Recording/NICE Inform Recorder **data source** node.
3. Click the **Settings** tab and the **Settings** page is presented.
4. In the **Resource Mappings** section, configure the following options:

- **Enable automatic import of resources** - check the box, click the drop down arrow and select the default resource type and Free seating type from the lists. These resources will now be automatically imported periodically using these settings.
- **Assign automatically imported resources to group** - if required, resources can be automatically assigned to a resource group when they are imported. To configure this, click the **Browse** ... button and the **Select The Resource Group To Assign Automatically Imported Resources To** dialog is presented. Select the required **Resource group** from within the **Groups** tree and then select the resources to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

5. In the **Application Settings** section, the following option is available:
   - **Include this data source in Reporter 'Call Data' reports** - if checked (default setting) call data is collected by the Reporter Warehouse and therefore is an available data source for report generation within NICE Inform Reporter. If this NICE Recording/NICE Inform Recorder data source is configured for Central Archiving, you must uncheck this box otherwise you will have a duplication of call records from the logger and from the Central Archive. To check if this data source is configured for Central Archiving, refer to Editing a NICE Recording/NICE Inform Recorder data source (see page 37).

     Once this option is unchecked, the Reporter Warehouse will stop collecting call records and any records that have been collected previously are no longer used in reports generated within NICE Inform Reporter.

7.9 NICE Recording/NICE Inform Recorder resilient servers

NOTE: Specific terminology is used when navigating the tree pane to view details of all NICE Recording/NICE Inform Recorder resilient servers which are configured for Core Server Resilience (CSR). For help with this terminology, refer to Tree structure terminology (see page 4).

▶ To view the details of all NICE Recording/NICE Inform Recorder resilient servers which are configured for Core Server Resilience (CSR):

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node**.**
2. Select the **Data Sources** node and then select the required **NICE Recording/NICE Inform Recorder data source** node.
3. Click the **Resilient Servers** tab. The **Resilient Servers** page is presented.

The Resilient Servers page displays (in the form of a table) an entry for each NICE Recording/NICE Inform Recorder resilient server in the system.

The Resilient Servers table displays the following information:

NOTE: Apart from the ℹ column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 7-1: NICE Recording/NICE Inform Recorder resilient servers

Column	Description
ℹ	An ✖ icon is displayed if the system is failing over or is recommissioning.
Network address	The hostname or IP address of the NICE Recording/NICE Inform Recorder resilient server.
Resilience group	The name of the resilient group that the resilient server belongs to.
Server type	The type of resilient server (Unknown, Core, Satellite recorder or CTI server).
Role	The resilient server role (Unknown, Active or Standby).
Status	The resilience operation state (Unknown, Live, Inoperative, Replicating, Not replicating, Standing by, Recommission request or Failed over).

7.10 Global settings

NOTE: Specific terminology is used when navigating the tree pane to configure the global settings for a NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Global Settings page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

This section is used to configure the global settings for the NICE Inform Recorder data source.

NOTE: In order to make any global setting changes, you **MUST** have the **Configure recording systems** privilege assigned to you by a NICE Inform Administrator.

The Global Settings page has a number of sections which can be expanded and collapsed. To expand a section, click the + button and to collapse a section, click the − button. The following sections are available:

- System Settings
  The following global system settings are available:
  - **Record/Censure list -** phone numbers can be excluded from recording, for example for privacy reasons. Click the down arrow and select one of the following options from the list:
    - **No list in use -** all calls are recorded without filtering.
    - **Use censure list -** all calls are recorded except calls matching phone numbers in the Censure list. Once selected, the Censure list is enabled within the Record/Censure List (see page 67) page. Use this page to add or edit phone numbers to be excluded (censored) from recordings.
    - **Use record list -** all calls are recorded that match phone numbers in the Record list. Once selected, the Record list is enabled within the

Record/Censure List (see page 67) page. Use this page to add or edit phone numbers to be included in recordings.

– **Audit trail expiration time** - the system keeps an audit trail in its database for all call activities. (Play, Search, Mark etc.) This option defines how long audit events are kept in the database. Click the down arrow and select the required expiration time from the list.

NOTE: If you want to keep all audit trail events indefinitely, select the **Never remove audit trail entries** option.

– **Error log expiration time** - the system stores an error log. This option defines how long the error log is kept in the system. Click the down arrow and select the required expiration time from the list.

NOTE: If you want to keep the error log indefinitely, select the **Never remove error log entries** option.

– **Authentication domain** - the domain used for password authentication of users. If a user account is created with the 'Domain Authentication' option. The user is authenticated in this domain. This is not necessarily the domain the recorder is in however, a trust relation must exist between the recorder domain and the domain selected here. By default, this field is empty. If required, add an authentication domain in the text box provided.

- Archive Service Settings

  The following global archive service settings are available:

  – **Database backup start time** - the time to start backing up the database. Click the down arrow and select a time from the list when the load on the system is lowest (e.g. at night). The range is every hour from 00:00 (default) to 23:00.

  – **Database backup interval** - how often the database is backed up. Click the down arrow and select the required interval from the list. The range is between every day (default) to every 7 days. For example, the **Database backup start time** = 02:00, **Database backup interval** = every 2 days: the database is backed up every other day at 02:00 in the morning.

  – **Hold-off time** - the hold-off time (minutes) for archiving. Click the down arrow and select the required time from the list. When recorded, calls are stored on the Core Server, and then archived after the set number of minutes. If you select the **Disabled** option, calls are archived immediately.

    ➢ **Archiving calls with CDR data** - archive hold-off time for installations (integrations) where CDR data is processed the CDR data is typically sent with a delay at the end of a call. As a result, the call may have already been archived before the CDR data has been processed and added to the call. In this instance the archived call does not have a known user and will get the default retention time, instead of the user's required retention.

    ➢ **Archiving in multi time zone deployments** - the local time of the recordings can be different from the Core Server's local time. NICE Inform Recorder takes the UTC time into account when internally creating the archive task following the hold-off time, but executes the archive task based on local time. This means that if a call was recorded on a satellite that is ahead of the time zone compared to the Core Server (for example, a satellite in New York and a Core Server in Amsterdam), the call can show up as archived with some hours of difference.

- **Enable beep on archive media full** - check the box to enable the feature and the system gives an audio alarm whenever one or more archive locations are full. The system only considers storage devices.
- **Enable 8.9 CLS / NPR3.2 / NPR 3.5 archive locations** - check the box to enable this feature if you are using the NICE Migration Application to migrate NiceLog 8.9, NICE Perform 3.2 or 3.5 to NICE Recorder.
- **Stop deletion from archive locations** - check the box to keep all calls and call data in archive(s), regardless of retention settings. This only keeps calls that are already archived and/or scheduled for archiving. There are three call deletion methods:
  - 1. Delete audio from the Core Server's local disc.
  - 2. Delete record from the database on the Core Server.
  - 3. Delete record from archive locations.

NOTE: Stop deletion relates to **2** and **3**. However, if a call is archived, its corresponding audio is removed from the Core Server as usual.

Only use this option as a temporary measure, as this dramatically increases your archive storage requirements.

  - Uncheck this option and retention rules apply again and NICE Inform Recorder starts deleting archived calls that are marked for deletion. Depending on the amount of call traffic, you can expect to clear the backlog of undeleted calls at these rates:

    ~300K calls per day, with high call traffic.

    ~500K calls per day, low call traffic.
- **Archive interval** - use this option to set when you require to archive all your content rules that have been configured within the Content Rules (see page 58) page. Click the down arrow and select one of the following:
  - **None (archive immediately)** - the archive content rules start immediately.
  - **Daily schedule** - once selected, set the start and stop time (24 hour format) in the text boxes provided and the archive starts and stops within the scheduled period.

- Encryption Settings

  The following global encryption settings are available:

  - **Enable encryption** - check the box to enable encryption. If a call is encrypted, it can only be replayed using a recorder that has this same encryption key stored. Once enabled, the following options are provided:
    - **Encryption key** - enter the encryption key (numeric value only) in the text box provided. This particular encryption key is used to encrypt the calls. The

system keeps all historical key changes, to be able to decrypt all calls at any time.

  - **Encryption key confirmation** - retype the encryption key in the text box provided.

- SNMP Monitoring

NICE Inform Recorder supports SNMP v1, v2 and v3. Only SNMP v3 supports encryption.

The following global SNMP monitoring settings are available:

- **Trap generation** - click the down arrow and either select:
  - **Single trap** - SNMP alarms are generated in one single trap.
  - **Individual trap** - each SNMP trap is generated individually (multiple traps).
- **SNMP version** - Click the down arrow and select the required SNMP version from the list that you are using.
- **SNMP v1 server address** - if applicable, enter an IP address or hostname in the provided text box for each SNMP v1 server which is used to receive the SNMP traps.
- **Send daily health report** - a daily SNMP health report can be generated at a specific time of the day. It instructs the recorders to send out a set of SNMP health traps to the SNMP server. Click the down arrow and select the time when you require the health report to be sent (24 hour format). For a list of all the SNMP health reports, refer to the *NICE Inform Recorder Maintenance Guide*.
- **SNMP v2 server address** - if applicable, enter an IP address or hostname in the provided text box for each SNMP v2 server which is used to receive the SNMP traps.
- **SNMP community string** - the community string is sent only for SNMP v1 keep alives, SNMP v1 health reports, and SNMP v2 alarms. Default: public. Not configurable when SNMP v1 has been selected. This field is only editable when SNMP v1 & v2 **SNMP version** is selected.
- **SNMP v3 server address** - if applicable, enter an IP address or hostname in the provided text box for each SNMP v3 server which is used to receive the SNMP traps.
- **Security level** - this field is only available when v3 SNMP **SNMP version** is selected and defines the security level of the information passed to the SNMP servers. Select one of the following security levels:
  - **None** - no security is applied. However, you must enter an **Authentication username**.
  - **Authentication** - traps and health reports sent to the SNMP server will be authenticated against the username and password supplied.
  - **Authentication + Privacy** - traps and health reports sent to the SNMP server will be encrypted. One password is used for encryption and a second password for authentication.
- **Authentication username** - enter the authentication username in the text box provided. This field is only available when v3 **SNMP version** is chosen and must

be populated with the username that matches the security name set up on the SNMP server.

- **Authentication password** - enter the authentication password in the text box provided. This field is only available if the **Security level** is set to either **Authentication** or **Authentication + Privacy** and must be populated with the password that matches the authentication password configured on the SNMP server.
- **Authentication protocol** - click the down arrow and select the required authentication protocol from the list. This field is only available if the **Security level** is set to either **Authentication** or **Authentication + Privacy**. The authentication protocol can be either **MD5** or **SHA** and must match that configured on the SNMP server.
- **Privacy password** - enter the privacy password in the text box provided. This field is only available if the **Security level** is set to **Authentication + Privacy** and must be populated with the password that matches the Privacy password configured on the SNMP server.
- **Privacy protocol** - click the down arrow and select the required privacy protocol. This field is only available if the **Security level** is set to **Authentication + Privacy**. The authentication protocol can be either DES or AES and must match that configured on the SNMP server.

7.11 Recorder settings

NOTE: Specific terminology is used when navigating the tree pane to configure recorder settings for a NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Recorder Settings page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

Use the Recorder Settings page to add or edit the properties for each recorder connected to the NICE Inform Recorder data source.

NOTE: In order to make any changes to the recorder settings, you **MUST** have the **Configure recording systems** privilege assigned to you by a NICE Inform Administrator.

▸ To configure recorder settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Recorder Settings** tab and the **Recorder Settings** page is presented.

Each recorder is displayed within the Recorders table. The following information is displayed:

Table 7-2: Recorders

Column	Description
Recorder	The unique recorder ID.
Type	The recorder audio type (e.g. voice).
IP address	The IP address for the recorder.
Computer name	The recorder computer name.
Channels	The channels or channel range on the recorder.
Auto start	Displayed to indicate that the recorder is set to auto start (**Yes**). You cannot disable this feature when adding and editing a recorder (see page 52).
Compression type	The compression type for this recorder (e.g. GSM (13.2 kbit / sec).

Available buttons

The following buttons are available:

- **Add** - enables access to add a recorder (refer to Adding and editing a recorder (see page 52)).
- **Edit** - enables access to edit a recorder (refer to Adding and editing a recorder (see page 52)).
- **Delete** - deletes the selected recorder (refer to Deleting a recorder (see page 55)).

7.11.1 Adding and editing a recorder

NOTE: Specific terminology is used when navigating the tree pane to add and edit a recorder. For help with this terminology, refer to Tree structure terminology (see page 4).

To add or edit a recorder location:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Recorder Settings** tab and the **Recorder Settings** page is presented.
4. Do one of the following:
   - When adding a new recorder, click the **Add** button.
   - When editing a recorder, select the recorder in the **Recorders** table and double click or click the **Edit** button.

NOTE: In both cases, the **Add Recorder**/**Edit Recorder** control is presented.

5. The **Add**/**Edit Recorder** control displays a tabbed dialog. Select one of the following tabs:

– Setup page (see page 53)
– Error Notification page (see page 53)
– General Settings page (see page 54)
– Scheduled Satellite Link page (see page 54)

7.11.1.1 Setup page

The following recorder setup options are available:

- **Audio files location** - the location set for the audio files when the recorder was initially configured. This is read-only and displayed for your information only.
- **Start channel** - enter the start channel number of the recorder in the text box provided. The system numbers all the channels of the recorder starting with this start channel. Since every channel in the system is unique, channels of different recorders must not overlap.

NOTE: After adding a new card to the system, you might need to adjust the start channel for one of the recorders with overlapping channels. The system notifies you of these situations. The channels of the recorders in question can be renumbered while keeping all settings for these channels.

After adjusting the start channel on a satellite, you **MUST** restart the services on that satellite.

- **Auto start** - this check box is read-only and is checked to auto start the recorder when it is powered on.

7.11.1.2 Error Notification page

The following error notification options for the recorder are available:

- **Log file expiration time** - click the down arrow and select from the list how many days the log files are to be kept.
- **Location of the log file** - enter the location where the log files will be stored in the text box provided. If you specify a location that does not exist and cannot be created, the recording system uses the default LOGFILES folder on the system drive (e.g. C:\LOGFILES).
- **Warning issued if disk space less than** - enables you to set how much space on the disk of this recorder should be left by default before the system issues a warning. To set, click the down arrow and select the percentage value from the list.
- **Disk marked full if disk space less than** - enables you to set how much space is left on the hard disk on this recorder before the disk is considered to be full. To set, click the down arrow and select the percentage value from the list.
- **'Disk full' error handling** - click the down arrow and select one of the following options from the list:
  - **Stop recording** - no further calls are recorded.
  - **FIFO mode** - the oldest calls are removed to free disk space.
- **Enable beep on serious error** - check the box to enable the alarm for any serious errors in the recorder. Error messages can be sent as e-mails or SNMP traps.

- **SNMP keep alive interval** - interval for SNMP keep alive messages. When using external SNMP monitoring alarms can be raised when keep alive messages are not received within the selected interval. To set, click the down arrow and select the required interval from the list.

7.11.1.3 General Settings page

The following general settings for the recorder are available:

- **Enable 'Automatic Gain Control' on record** - check the box to enable Automatic Gain Control (AGC) which effectively reduces the volume if the signal is strong and raises it when it is weaker to average out the volume level of the call.

NOTE: By applying AGC, the recorded call is no longer an exact copy of the original call.

- **In-Law** - the law setting for the PBX used. Click the down arrow and select one of the following audio formats for this recorder:
  - **μ-law -** usually used in North-America and Japan.
  - **A-law** - usually used in the rest of the world.

NOTE: If the wrong audio format setting is selected, the quality of the audio (calls) is very poor.

- **Compression type** - the compression type for this recorder. You can use compression to reduce the file size to a smaller number of bits. This means that more audio can be placed on a storage device with the same capacity. Click the down arrow and select one of the following:
  - **No compression** - audio is not compressed and the data rate is 64 Kbps.
  - **ADPCM -** compression technique with a compression ratio of 2.0:1 or 2.7:1 and a data rate of 32.0 kbps or 24.0 kbps.
  - **GSM and Fast GSM -** compression technique with a compression ratio of 4.8:1 and a data rate of 13.0 kbps. Processor load is low to moderate. The difference between GSM and Fast GSM is that with Fast GSM compressing is faster. As a result, not only the processor load is less, but also the quality of the sound.
  - **True speech** - a compression ratio of 7.5:1 and a data rate of 8.5 kbps.

7.11.1.4 Scheduled Satellite Link page

You can schedule uploading of recorded calls between satellite and server systems. Only during the defined hours of the week (blue), are calls loaded to the recording system. Each call is completely uploaded even if during the upload the schedule ends. The link between satellite and server is checked. Link failures generate alarms. The link between server and satellite must always be present, even if link load is scheduled.

By default, all hours of the week are selected (blue). If there are any hours of the week that you do not require scheduling the upload of recorded calls between the satellite and server, deselect the hour period in the grid. The period changes to white to indicate that it is now inactive.

7.11.2 Deleting a recorder

You can only delete a recorder if the satellite has not been connected to a core server i.e. if the satellite recorder has been assigned with this recorder ID you **CANNOT** delete it as it is assumed there is recorded audio that you would not want to delete.

▸ To delete a recorder that has not been connected to a core server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Recorder Settings** tab and the **Recorder Settings** page is presented.
4. Select the recorder for deletion from the **Recorders** table.
5. Click the **Delete** button followed by the **Save** button.

7.12 Locations settings

NOTE: Specific terminology is used when navigating the tree pane to configure archive location settings for a NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Locations page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

The Locations page displays the servers within the recording system and provides an overview of their locations, settings and status.

If call audio no longer exists on the recorder, it is retrieved from one of the archive locations. If a user tries to access a call for replay and the audio is no longer available on the recorder, the recorder automatically checks the archive to locate the audio recording.

NOTE: In order to make any archive location changes, you **MUST** have the **Configure recording systems** privilege assigned to you by a NICE Inform Administrator.

▸ To configure archive location settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Locations** tab and the **Locations** page is presented.

The archive locations are displayed within the Archive Locations table. The following information is displayed:

Table 7-3: Archive locations

Column	Description
Alias (name)	The name for the archive location.
Location	The file location for the archive (e.g. D:\Archive).
Type	The archive location type (e.g. Network location or Fixed (path on a local drive)).
Location state	The current status of the archive location (e.g. Connected).
Medium state	The current status of the media used for the archive (e.g. New medium found).
Processing state	Indicates whether the location is actively processing archive data.
Free space	The free space (expressed as a percentage) on the archive location.

Available buttons

The following buttons are available:

- **Add** - enables access to add an archive location (refer to Adding and editing a location (see page 56)).
- **Edit** - enables access to edit an archive location (refer to Adding and editing a location (see page 56)).
- **Delete** - deletes the selected archive location (refer to Deleting a location (see page 57)).

7.12.1 Adding and editing a location

NOTE: Specific terminology is used when navigating the tree pane to add and edit an archive location. For help with this terminology, refer to Tree structure terminology (see page 4).

To add or edit an archive location:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Locations** tab and the **Locations** page is presented.
4. Do one of the following:
   - When adding a new location, click the **Add** button.
   - When editing a location, select the location in the **Archive Locations** table and double click or click the **Edit** button.

NOTE: In both cases, the **Add Location**/**Edit Location** control is presented.

5. The **Add/Edit Location** control displays a tabbed dialog. Select one of the following tabs:

   – Properties page (see page 57)

   – Authentication page (see page 57)

7.12.1.1 Properties page

The Properties page, enables you to configure the properties for the archive location.

The following options are available:

- **Location type** - click the drop down arrow and select the required location type for your archive location.

NOTE: If you are editing this location, the location type is read only and the text *fixed* is displayed.

- **Name** - enter the name for the archive location in the text box provided.
- **Location** - enter the location (path) for the archive location in the text box provided.
- **Auto-format new (blank) media** - only available if you select either the DVD RAM or RDX location types. Check the box to enable the recorder to automatically format the blank media that is inserted in the drive.

7.12.1.2 Authentication page

The Authentication page, enables you to configure the authentication details for the archive location. The options displayed on this page are dependent on the location type configured on the Properties page (see page 57).

For location types that require authentication (e.g. NetApp SnapLock), enter the user account and password details in the text boxes provided.

For location types that do not require authentication (e.g. DVD RAM and Fixed), authentication details are not required.

7.12.2 Deleting a location

NOTE: Specific terminology is used when navigating the tree pane to delete an archive location. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To delete an archive location:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Locations** tab and the **Locations** page is presented.

4. Select the required archive location for deletion from the **Archive Locations** table.
5. Click the **Delete** button followed by the **Save** button.

7.13 Content rules

NOTE: Specific terminology is used when navigating the tree pane to configure the content rules for a NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Content rules page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

Content rules specify which calls to archive to which locations. All calls must be archived using content rules. Use the Content Rules page to configure and view your content rules.

NOTE: Once you have configured your content rules (refer to Adding and editing a content rule (see page 59)), you must set the **Archive interval** option within the Global Settings (see page 47) page to set when the content rules are archived.

To configure content rules:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Content Rules** tab and the **Content Rules** page is presented.

The content rules are displayed within the Content Rules table. The following information is displayed:

Table 7-4: Content rules

Column	Description
Rule name	The name for the content rule.
Active	Whether this rule is active or not.
Rule type	The type of content rule (e.g. Online storage).
Locations	The location for the archive content rule as configured within the **Locations** page (refer to Location settings (see page 55)).
Channel range	The channel range(s) selected for the content rule.
User groups	Content rules for calls with specific user groups. By default all calls are archived which is configured by the wildcard ‘-‘.

Available buttons

The following buttons are available:

- **Add** - enables access to add a content rule (refer to Adding and editing a content rule (see page 59)).
- **Edit** - enables access to edit a content rule (refer to Adding and editing a content rule (see page 59)).
- **Delete** - deletes the selected content rule (refer to Deleting a content rule (see page 62)).

7.13.1 Adding and editing a content rule

NOTE: Specific terminology is used when navigating the tree pane to add and edit a content rule. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To add or edit a content rule:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Content Rules** tab and the **Content Rules** page is presented.
4. Do one of the following:
   – When adding a new content rule, click the **Add** button.
   – When editing a content rule, select the rule in the **Content Rules** table and double click or click the **Edit** button.

NOTE: In both cases, the **Add Content Rule**/**Edit Content Rule** control is presented.

5. The **Add**/**Edit Content Rule** control displays a tabbed dialog. Select one of the following tabs:
   – Settings page (see page 59)
   – Selection Criteria page (see page 60)
   – Schedule page (see page 60)
   – Archive Settings page (see page 61)

7.13.1.1 Settings page

The Settings page, enables you to configure the settings for the content rule. When editing the rule, the settings displayed are dependent on the selected **Rule type**.

The following options are available:

- **Rule name** - enter the name for the content rule in the text box provided.

- **Activate rule** - check/uncheck the box to activate/deactivate the content rule.
- **Rule type** - click the down arrow and select one of the following content rule types:
  - **Core server content management** - this rule does **NOT** archive and can be used to delete audio and call data.
  - **Online storage** - non-removable media such as fixed, network location, CIFS WORM, EMC.
  - **Removable storage** - removable media such as HP RDX and DVD-RAM drives.
- **Locations used in this rule** - this option is only available if you select the **Online storage** Rule type. Select the required location to archive audio and call data to.

7.13.1.2 Selection Criteria page

The following selection criteria requirements for the content rule are available:

- **Channel ids** - to select content rules to be channel specific, click the **Browse** ... button and the **Select Channel Ids** dialog is presented. Select the channels you wish to add to the rule.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected channel Ids from the list.

Channel IDs are not always the same as channels. When adding channels to a satellite server in a multi satellite recording system, the new channel IDs start at the total number of channels in the recording system. A channel ID is always linked to a physical recorder channel. When changing the start channel of a satellite server, the channel IDs stay linked to the new recorder channels. All recording system channel/user configurations stay intact.

- **Database fields** - you can configure content rules for calls that contain specific call details such as Talkgroup or Radio ID. To select database fields, click the **Browse** ... button and the **Select Database Fields** dialog is presented. Select the database fields you wish to add to the rule.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected database fields from the list.

- **User groups** - to select content rules for calls with specific user groups, click the **Browse** ... button and the **Select User Groups** dialog is presented. Select the user groups you wish to add to the rule.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected database fields from the list.

7.13.1.3 Schedule page

The following schedule requirements for the content rule are available:

- **Archive calls** - define when to archive calls. Enter a numeric value in the left-hand text box and in the right-hand field, click the down arrow and select one of the following:

- **Older than N days/weeks/months** - calls will be archived after the set time period. The period **MUST** be longer than the one set for the **Delete core server audio** option.
- **Immediately** - calls will be archived immediately. The numeric value entered in the left-hand text box is not relevant.

NOTE: The Archive calls option is **NOT** available if the rule type is set to **Core server content management** (as set on the Settings page (see page 59)).

- **Delete call server audio** - check the box if you require audio to be deleted from the core server. Once enabled, enter a numeric value in the left-hand text box and in the right-hand field, click the down arrow and select one of the following:
  - **Older than N days/weeks/months** - call server audio will be archived after the set time period.
  - **Immediately** - call server audio will be archived immediately. The numeric value entered in the left-hand text box is not relevant.
  - **Follow retention** - follows the **Default retention** setting as configured within the Archive Settings page (see page 61).
- **Delete call data** - check the box if you require call data to be deleted from the core server. Once enabled, enter a numeric value in the left-hand text box and in the right-hand field, click the down arrow and select one of the following:
  - **Older than N days/weeks/months** - call data will be archived after the set time period.
  - **Immediately** - call data will be archived immediately. The numeric value entered in the left-hand text box is not relevant.
  - **Follow retention** - follows the **Default retention** setting as configured within the Archive Settings page (see page 61).

7.13.1.4 Archive Settings page

NOTE: The options on the Archive Settings page are **NOT** available if the rule type is set to **Core server content management** (as set on the Settings page (see page 59)).

The following archive settings for the content rule are available:

- **Auto format** - check the box if you require formatting the removable storage device. Calls are removed if the newest call on the medium is older than the specified time period of days, months or years. To set when you require to format the removable storage device, enter a numeric value in the left-hand text box and in the right-hand field, click the down arrow and select either **After N days**, **months** or **years**.

NOTE: The Auto format option is only available if the rule type is set to **Removable storage** (as set on the Settings page (see page 59)).

- **Auto finalize** - check the box to mark the removable storage device as full after the specified time period of days, months or years. To set when you require to mark the removable storage device as full, enter a numeric value in the left-hand text box and in the right-hand field, click the down arrow and select either **After N days**, **months** or **years**.

NOTE: The Auto finalize option is only available if the rule type is set to **Removable storage** (as set on the Settings page (see page 59)).

- **Default retention** - calls are kept for a specified time period of days, months or years. To set when you require to set the default retention for calls, enter a numeric value in the left-hand text box and in the right-hand field, click the down arrow and select either **After N days**, **months** or **years**.

NOTE: The Default retention option is only available if the rule type is set to **Online storage** (as set on the Settings page (see page 59)).

- **Change retention historically** - when enabled (checked), applies the content rule to calls which have already been archived. once enabled, enter the retention date in the text box provided. Date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).
- **Number of database backups** - click the down arrow and select the number of database backups to save at the specified location (as set on the Settings page (see page 59)). You cannot restore a database from the recorder application. You can only do this directly on the server.

7.13.2 Deleting a content rule

NOTE: Specific terminology is used when navigating the tree pane to delete a content rule. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a content rule:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Content Rules** tab and the **Content Rules** page is presented.
4. Select the required content rule for deletion from the **Content Rules** table.
5. Click the **Delete** button followed by the **Save** button.

7.14 Channels

NOTE: Specific terminology is used when navigating the tree pane to configure channels for a NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Channels page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

Use the channels page to view and edit the details of the available channels on the recorder.

NOTE: In order to make any changes to the channels, you **MUST** have the **Configure recording systems** privilege assigned to you by a NICE Inform Administrator.

To configure channel details:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Channels** tab and the **Channels** page is presented.

The available channels are displayed within the **Channels** table. The following information is displayed:

Table 7-5: Channels

Column	Description
Channel id	The unique number (id) for this channel.
Channel	The channel name.
Available	Indicates whether the channel is present (**Yes**/**No**) in terms of hardware.
Channel usage	Indicates whether this channel is set either as a: ▪ **Fixed seating** location - for fixed seating configurations, there is a direct link between the channel and a user linked to this channel. ▪ **Free seating** location - for free seating configurations, the user is linked to the channel using the log on free seat procedure. The log on procedure links the user to a recording channel based on the workstation hostname or IP address.
Extension	The channel extension number. This is **ONLY** applicable when the Channel usage is set to **Fixed seating**.
Host computer	The Host name or IP address for the workstation. This is **ONLY** applicable when the Channel usage is set to **Free seating**.

Available button

The following buttons are available:

- **Edit** - enables access to edit the details for a channel (refer to Editing a channel (see page 63)).

7.14.1 Editing a channel

NOTE: Specific terminology is used when navigating the tree pane to edit the details for a channel. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit the details for a channel:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Channels** tab and the **Channels** page is presented.
4. Click the **Edit** button and the **Edit Channel** control is presented.
5. The **Edit Channel** control displays a tabbed dialog. Select one of the following tabs:
   - Properties page (see page 64)
   - Usage page (see page 64)
   - Threshold page (see page 65)

7.14.1.1 Properties page

The following properties for the channel are available:

- **Alias (English)** - enter an English alias in the provided text box. This alias is appended to the channel name. To add an alias, the language file must have been first imported for this recorder.
- **Alias ()** - enter an alias (language other than English) in the provided text box. This alias is appended to the channel name. To add an alias, the language file must have been first imported for this recorder. The language associated to the file that has been imported is displayed in between the () e.g. *Alias (Spanish)*.

7.14.1.2 Usage page

The following usage settings for the channel are available:

- **Seating** - select one of the following:
  - **Fixed seating** - for fixed seating configurations, there is a direct link between the channel and a user linked to this channel.
  - **Free seating** - for free seating configurations, the user is linked to the channel using the log on free seat procedure. The log on procedure links the user to a recording channel based on the workstation host name or IP address.
- **Extension** - if required, enter the channel extension number in the text box provided.

NOTE: The Extension option is **ONLY** applicable when the Channel usage is set to **Fixed seating**.

- **Linked workstation -** the host name or IP address for the workstation. Do one of the following:
  - Enter the host name or IP address for the workstation in the text box provided.
  - Click either the **Host IP** or **Host name** button to auto populate the details for your workstation in the text box.

NOTE: The Linked workstation option is **ONLY** applicable when the Channel usage is set to **Free seating**.

7.14.1.3 Threshold page

The following threshold setting for the channel is available:

- **VOX Threshold dB** - enter the VOX dB value within the range between -13 dB and 9 dB in the text box provided. Entry is assisted by using the up/down arrows. Once set, click the **Ok** button.

7.15 Alarms

NOTE: Specific terminology is used when navigating the tree pane to configure channel alarms for a NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Alarms page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

Use the Alarms page to configure channel alarms. Channel alarms can be triggered based on channel connection, activity and/or inactivity, and missing VOX/CDR records. These alarms are generated in a similar way to normal alarms triggering SNMP traps and e-mail alarms.

NOTE: In order to make any changes to channel alarms, you **MUST** have the **Configure recording systems** privilege assigned to you by a NICE Inform Administrator.

The Alarms page has a several sections which can be expanded and collapsed. To expand a section, click the [+] button and to collapse a section, click the [−] button. The following sections are available:

- Channel Inactivity Settings

  An inactivity alarm is triggered should the channel be inactive for too long. Use this section to specify the number of hours of inactivity, the days and hours during which to test for inactivity, and which channels to monitor.

  Configure the following options:

  - **Channel inactivity period** - click the down arrow and select the period (number of hours) of inactivity from the list.

- **Monitoring hours** - use the provided weekly grid to select the hours to monitor for inactivity. To set the required hours to monitor, click in the corresponding box which changes to a blue color indicating that the hour period is now being monitored.

NOTE: If the system is not used over the weekend, the inactivity alarm must not be triggered.

- **Channels to monitor** - click the **Browse** ... button and the **Select Channel Ids** dialog is presented. Select the channels you wish to monitor.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected channel Ids from the list.

- Channel Activity Settings

  Use this section to specify the number of hours of activity on particular channels that you require monitoring.

  Configure the following options:

  - **Channel activity period** - click the down arrow and select the period (number of hours) of activity from the list.
  - **Channels to monitor** - click the **Browse** ... button and the **Select Channel Ids** dialog is presented. Select the channels you wish to monitor.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected channel Ids from the list.

- Missing CDR or VOX Alarm Settings

  Alarms can be triggered by call records without VOX or CDR. Use this section to schedule a daily check for these types of call records (recommended outside of office hours).

  Configure the following options:

  - **Perform daily check at** - click the down arrow and select the hour period (24 hour format) from the list.
  - **For calls recorded on channels** - click the **Browse** ... button and the **Select Channel Ids** dialog is presented. Select the channels you wish to monitor.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected channel Ids from the list.

- **For calls recorded during** - use the provided weekly grid to select the hours to monitor. To set the required hours to monitor, click in the corresponding box which changes to a blue color indicating that the hour period is now being monitored.
- **Exclude speaker calls** - check the box to exclude monitoring calls on an external speaker. Once checked the following option is available:

- **Identification of speaker calls** - to exclude speaker calls, first click the down arrow and select the custom database field and contents that identify speaker calls from the list. Once done, specify field contents (wildcards are supported e.g. SP_*) using the text box provided. You can also specify multiple values separated by commas, for example 4,5,6.

- Channel Line Sync Settings

  Use this section to select which channels to monitor in order to trigger an alarm when the Recorder no longer detects a connected device (phone, trunk, etc.). For example, if tap wiring is removed or a phone is no longer operational and the line sync is lost for 5 minutes, the alarm is raised.

  Configure the following option:

  – **Channels to monitor** - click the **Browse** [...] button and the **Select Channel Ids** dialog is presented. Select the channels you wish to monitor.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected channel Ids from the list.

- Voice Metric Settings

  Each recording has a calculated voice metric between 0-100 (0 is low) that indicates how much speech the recording contains. An alarm is generated when the voice metric is below the assigned threshold value for the defined number of consecutive calls. The consecutive call count is calculated on a per channel basis.

  Configure the following options:

  – **Threshold value** - enter the minimum voice metric threshold value in the text box provided (0-100 (0 is low)).

  – **Number of consecutive calls** - enter the number of consecutive calls (1-9999) on a channel that must be below the threshold value before an alarm is triggered in the text box provided.

  – **Channels to monitor -** click the **Browse** [...] button and the **Select Channel Ids** dialog is presented. Select the channels you wish to monitor.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected channel Ids from the list.

7.16 Record/Censure list

NOTE: Specific terminology is used when navigating the tree pane to configure the record/censure list for a NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Record/Censure List page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

Use the Record/Censure List page to configure phone numbers to be excluded from recordings.

- To configure the record/censure list:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Record/Censure List** tab and the **Record/Censure List** page is presented.

The behavior in Record/Censure List page depends on what is set in **Record/Censure list** option within the **Systems Settings** section on the Global settings (see page 47) page. The following options are available:

- **No list in use** - all calls are recorded without filtering and the functionality on Record/Censure List page is disabled.
- **Censure list** - all calls are recorded except calls matching phone numbers in the Censure list.
- **Record list** - all calls are recorded that match phone numbers in the Record list.

Each number (with related information) is displayed in the Record/Censure List table. The following information is displayed:

Table 7-6: Record/Censure List

Column	Description
Id	The unique number (id) for this phone number.
Number	The phone number for this record or censure list.
Direction	The direction of the call. This can either be **All** (both directions) or just **Incoming** or **Outgoing**.
Contact person	The contact person whose phone number this is.
Store call data	If the call event is to be stored in the database even if the call is filtered (**Yes**/**No**). This column is **ONLY** displayed if the list is in censure mode.
Reason/Remarks	The reason for the blacklisting of this number.

Available buttons

The following buttons are available:

- **Add** - enables access to add a phone number (refer to Adding and editing a phone number (see page 69)).
- **Edit** - enables access to edit a phone number (refer to Adding and editing a phone number (see page 69)).
- **Delete** - deletes the selected phone number (refer to Deleting a phone number (see page 70)).

7.16.1 Adding and editing a phone number

NOTE: Specific terminology is used when navigating the tree pane to add and edit a phone number. For help with this terminology, refer to Tree structure terminology (see page 4).

To add or edit a phone number:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Record/Censure List** tab and the **Record/Censure List** page is presented.
4. Do one of the following:
   - When adding a new phone number, click the **Add** button.
   - When editing a phone number, select the phone number in the **Record/Censure List** table and double click or click the **Edit** button.

NOTE: In both cases, the **Add Number/Edit Number** control is presented.

5. The **Add/Edit Number** control displays a tabbed dialog. Select one of the following tabs:
   - Phone Number Settings page (see page 69)
   - Reason/Remarks page (see page 70)

7.16.1.1 Phone Number Settings page

Use this page to add a phone number and associated settings to the Record/Censure list.

The following options are available:

- **Number** - enter the phone number for the record/censure list the text box provided.
- **Column** - the database column used to test the record/censure list. The default value is CVSNBR which represents the number information field (CLI). When adding customized text fields to the database, these extra fields can also be used to test the record/censure list. Select the required database column or columns (using Microsoft Windows standard Shift and Ctrl methods) from the list.
- **Contact person** - enter the contact person whose phone number you are adding in the text box provided.
- **Direction** - click the down arrow and select one of the following call direction options:
  - **(All)** - both incoming and outgoing directions for calls for this phone number are included in the record/censure list.
  - **Incoming** - only incoming calls for this phone number are included in the record/censure list.

- **Outgoing** - only outgoing calls for this phone number are included in the record/censure list.

- **Store call data** - check the box to store call events in the database even if the call is filtered.

NOTE: The Store call data option is **ONLY** displayed if the list is in censure mode.

7.16.1.2 Reason/Remarks page

Use this page to enter a reason or a remark in the text box provided as to why calls for this number are to be added to the Record/Censure List.

If the call event is stored in the database, this reason remark is added as a remark for the call.

7.16.2 Deleting a phone number

NOTE: Specific terminology is used when navigating the tree pane to delete a phone number. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a phone number:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Record/Censure List** tab and the **Record/Censure List** page is presented.
4. Select the phone number or numbers (using Microsoft Windows standard Shift and Ctrl methods) for deletion from the **Record/Censure List** table.
5. Click the **Delete** button followed by the **Save** button.

7.17 Recording Schedules

NOTE: Specific terminology is used when navigating the tree pane to configure recording schedules for a NICE Inform Recorder data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Recording Schedule page is **ONLY** available if your system is licensed and enabled for advanced NIR configuration and is a supported NICE Inform Recorder version.

Use the Recording Schedule page to define which hours of every day in the week the channel will be activated for recording for the supported NICE Inform Recorder data source.

NOTE: In order to make any changes to the schedule rules, you **MUST** have the **Configure recording systems** privilege assigned to you by a NICE Inform Administrator.

To configure the recording schedules for all supported NICE Inform Recorder data sources, refer to Global NIR recording schedules (see page 30).

To configure recording schedules:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Recording Schedule** tab and the **Recording Schedule** page is presented.

The Recording Schedules page displays (in the form of a table) all the recording schedule rules that have been configured for the supported NICE Inform Recorder data source. The Recording Schedule table displays rules entered within the **Channel Schedule** dialog (refer to Adding and editing a recording schedule rule (see page 72)).

The following information is displayed:

Table 7-7: Recording schedule rules

Column	Description
	Rule status information. Blank if the rule has not been saved or has been saved successfully. An icon is displayed if the following occurs: ▪ If a saved rule has failed to be added or updated successfully on the data source. ▪ If a deleted rule has failed to be removed successfully from this data source.
	Channel type icon.
Label	A list of comma separated channels (labels) of the resources that the rule applies to. If this rule is inherited from a global recording schedule (refer to Global NIR recording schedules (see page 30)), the text *Global* is displayed.
Valid from	The date/day the rule is valid from. This can either be a date, a day of the week or daily.
Valid until	The date/day the rule is valid until. This can either be a date, a day of the week or daily.
Start time	The start time for the rule.
Stop time	The end time for the rule.

The following rules apply within the Recording Schedule table:

- Schedule Rules are in order of decreasing significance:
  - Schedule rules configured on this page for specific channels are listed above global rules that have been created within the Global NIR recording schedules (see page 30) page.

- Any scheduled rule that has a **Channel** column with an entry of *Global*, can only be configured within the Global NIR recording schedules (see page 30) page.
- Schedule rules that are set using a date range are more significant than ones set for specific days of the week which in turn are more significant than ones set as daily.
- To avoid multiple scheduled rules being applied on the same channel at the same time, the scheduled rule with the highest significance takes precedence.

Rule status

To display additional status information for a rule, select the rule in the table and click the + button. The following additional information may be displayed for the rule:

- If the rule has been successfully applied to this recording system, the following text is displayed: *This rule has been successfully applied to this recording system*.
- If a new rule has been added, but the new rule could not be applied to this recording system, the following text is displayed: *This rule could not be applied to this recording system*.
- If a rule has been modified, but the modification could not be applied to this recording system, the following text is displayed: *This rule could not be applied to this recording system*.
- If a rule has been deleted, but the rule could not be removed from recording system, the following text is displayed: *This rule could not be removed from this recording system*.
- If a rule has been added but not saved yet, then no text is displayed.

NOTE: Click the − button to collapse the rule status messages.

Available buttons

The following buttons are available:

- **Retry** - for an individual (selected) rule in the Recording schedule rules table, use when a save, edit or delete action for the rule has not been applied to this recording system.
- **Retry All** - for multiple (selected) rules in the Recording schedule rules table, use when a save, edit or delete action for the rule has not been applied to this recording system.
- **Add** - enables access to add a rule (refer to Adding and editing a recording schedule rule (see page 72)).
- **Edit** - enables access to edit a rule (refer to Adding and editing a recording schedule rule (see page 72)).
- **Delete** - deletes the selected rule (refer to Deleting a recording schedule rule (see page 74)).

7.17.1 Adding and editing a recording schedule rule

NOTE: Specific terminology is used when navigating the tree pane to add and edit a recording schedule rule. For help with this terminology, refer to Tree structure terminology (see page 4).

To add or edit a recording schedule rule:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Recording Schedule** tab and the **Recording Schedule** page is presented.
4. Do one of the following:
   - When adding a new rule, click the **Add** button.
   - When editing a rule, select the rule in the **Recording Schedule** table and double click or click the **Edit** button.

NOTE: In both cases, the **Channel Schedule** dialog is presented.

5. Select one of the following options from within the **Validity** section:
   - **Daily** - the rule will rule daily.
   - **Selected days** - configure the following options:
     - **Valid from** - click the down arrow and select the required day of the week from the list that the rule will start.
     - **Valid until** - click the down arrow and select the required day of the week from the list that the rule will end.
   - **Date range** - configure the following options:
     - **Valid from** - enter a date that the rule will start from. Date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).
     - **Valid until** - enter a date that the rule will end. Date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).
6. Set the following options from within the **Schedule** section:
   - **Start time** - enter the start time for the rule in the text box provided. This must be entered as an hour using the 24 hour clock format.

- **Stop time** - enter the stop time for the rule in the text box provided. This must be entered as an hour using the 24 hour clock format.

NOTE: The start time must be before the stop time as if not, a warning icon is displayed. Hover the cursor over the icon and a tooltip is displayed providing you more information.

7. Within the **Channel** section, select the required resources from the **Available resources** list, which lists all the items available in the system using the normal selection methods.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources.

8. Click the **OK** button followed by the **Save** button.

7.17.2 Deleting a recording schedule rule

NOTE: Specific terminology is used when navigating the tree pane to delete a recording schedule rule. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a recording schedule rule:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform Recorder data source** node.
3. Click the **Recording Schedule** tab and the **Recording Schedule** page is presented.
4. Select the required rule for deletion from the **Recording Schedule** table.
5. Click the **Delete** button followed by the **Save** button.

8 NLS audio data sources

This section covers all the available functions when configuring your NLS audio data sources:

8.1 Editing an NLS audio data source

NOTE: Specific terminology is used when navigating the tree pane to edit an NLS audio data source. For help with this terminology, refer to Tree structure terminology (see page 4).

An NLS audio data source incorporates two data source types. These are NiceCLS 8.9/9.0 and NiceLog loggers only audio.

To edit an NLS audio data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NLS audio data source** node.
3. Click the **General** tab and the **General** page is presented.
4. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - the name of the data source.
   - **SQL username** - the SQL username.
   - **Network address** - the hostname or IP address of the data source.
   - **SQL password**:
     (1) Click the **Set** button. The **Set SQL Password** dialog is presented.
     (2) Change the SQL password in the **Password** text box, and then repeat in the **Confirm password** text box.
     (3) Click the **OK** button. If there are no errors, the dialog closes.

NOTE: If NICE Inform is using a NiceCLS replication server, you are notified of the server name that it is being replicated to. This is configured within the **Settings** page by checking the **Use as backup** check box (refer to NiceCLS settings (see page 84)).

The System type section is read-only and **CANNOT** be changed.

- **Use a named SQL Server instance** - check the box and the following option is enabled:
  - **Name** - the SQL instance name used to host the NiceCLS database.

NOTE: The named SQL Server instance option is **ONLY** applicable to NiceCLS 8.9/9.0 & NiceLog data sources and **NOT** NiceLog loggers only audio data sources.

- **Legacy system** - Check the **Legacy system** box to set this data source to be in a legacy state from this point in time onwards. Once set, searching for any recordings after this date on any resources associated with this data source is not permitted. You can still search for recordings prior to this legacy date. Once set, the node in the tree pane for this data source changes  to show that it is now in a legacy state.

NOTE: If the Legacy system box is grayed out this data source has already been set as legacy.

Any recordings that began prior to when the data source was made legacy and end after the legacy date are still returned.

- **Use File Retrieval Service** - check the box to access files for the data source using the File Retrieval Service. The following option is enabled:
  - **Network address** - enter the hostname or IP address of the system you want to retrieve data source files from.
- **Use alternative location server** - check the box if you require to add an alternative location server e.g ANI/ALI. Once enabled, the following options are enabled:

NOTE: The Use alternative location server option is **ONLY** applicable to NiceCLS 8.9/9.0 & NiceLog data sources and **NOT** NiceLog loggers only audio data sources.

  - **Network address** - the hostname or IP address of the alternative location server.
  - **Authentication** - select either **Windows Authentication** if you use Windows authentication to connect to the location server, or **SQL Server Authentication** if you use Microsoft SQL Server to connect to the location server.
  - **SQL username** - the SQL username for the alternative location server (only available if you selected the **SQL Server Authentication** option).
  - **SQL password** - the SQL password for the alternative location server (only available if you selected the **SQL Server Authentication** option).

5. On completion, click the **Save** button.

NOTE: If you checked the **Legacy system** box, you are presented with a confirmation dialog confirming your selection. Click the **Yes** button to continue.

Logger available storage

Available logger storage space is displayed within the **Loggers** table in the bottom section of the **General** page. Information provided here includes:

NOTE: Apart from the i and **Online storage space** columns, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 8-1: Loggers table columns (NLS audio data source)

Column	Description
i	An icon is displayed if there is an error connecting to a logger.
Name	The name of the logger.
Network address	The hostname or IP address of the logger.
Online storage space	A colored bar displaying used and backed up space on the logger as a blue bar and the free space as a white bar. Hover the cursor over the bar to display a tooltip providing a percentage of free space, amount backed up and not backed up. This is **ONLY** relevant to removable media and does **NOT** include NICE Storage Center™ data. If it is not possible to connect to the logger then the text 'Unavailable' is displayed.

To update the available storage space for the loggers, click the **Refresh data** button.

8.2 Deleting an NLS audio data source

NOTE: Specific terminology is used when navigating the tree pane to delete an NLS audio data source. For help with this terminology, refer to Tree structure terminology (see page 4).

An NLS audio data source incorporates two data source types. These are NiceCLS 8.9/9.0 and NiceLog loggers only audio.

Before deleting an NLS audio data source, ensure that any required recordings held on the logger have been saved as incidents or as WAV or WMA files. You **CANNOT** access the recordings if the logger has been removed as all resources associated with this NLS audio data source are deleted and therefore **CANNOT** be searched against.

▶ To delete an NLS audio data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NLS audio data source** node for deletion.

3. In the button bar, click the **Delete data source** ✖ button. A confirmation message is presented confirming the deletion.

4. Click the **Yes** button.

The NLS audio data source is removed from the tree pane.

8.3 Importing NLS audio resources from a data source

NOTE: Specific terminology is used when navigating the tree pane to import NLS audio resources from a data source. For help with this terminology, refer to Tree structure terminology (see page 4).

An NLS audio data source incorporates two data source types. These are NiceCLS 8.9/9.0 and NiceLog loggers only audio.

▸ To import NLS audio resources from a data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NLS audio data source** node.

3. Click the **Resources** tab. The **Resources** page is presented.

4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.

5. Select the **Read the resource information from the data source** radio button and click the **Next** button.

6. At the **Specify Switch Mappings** screen, the options are different depending whether you are importing resources for a NiceCLS 8.9/9.0 or NiceLog loggers only data source and/or you are in Maintenance mode. Refer to the table below for all options that you may encounter.

NOTE: The Import maintenance channels option is **ONLY** available if you are in **Maintenance mode**. To enable this mode, (refer to Editing site details (see page 10)).

7. Check the **Enable automatic import of resources** box and the resources are automatically imported periodically based on the settings as configured on the NiceCLS settings page (refer to NiceCLS settings (see page 84)). These resource type settings for each switch ID (as configured on the NiceCLS Settings page) are the default options on this screen.

8. Click the **Import** button.

9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.

10. Do one of the following:

- Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
- Once the import process is complete, click the **Close** button to close the dialog.

11. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

Table 8-2: Specify Switch Mappings screen options (NLS audio)

NLS audio system	Maintenance mode	Result
NiceCLS 8.9/9.0	Disabled	Select the predominant resource type for each switch.
NiceCLS 8.9/9.0	Enabled	When importing switch data, check the Import CLS switch mappings check box and select the predominant resource type for each switch. You can also check the Import maintenance channels check box. This enables logger channels to be imported so that they can be referenced directly to the channels on the logger, which is useful for fault-finding.
NiceLog loggers only audio	Disabled	The Specify Switch Mappings screen is not displayed, the channels are imported automatically.
NiceLog loggers only audio	Enabled	Select the Import channels option to import the channels for the logger. You can also check the Import maintenance channels check box. This enables logger channels to be imported so that they can be referenced directly to the channels on the logger, which is useful for fault-finding.

8.4 Importing resources from a CSV file

NOTE: Specific terminology is used when navigating the tree pane to import resources from a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Importing resources from a CSV file is the same procedure for all data sources that support this function.

To import resources from a CSV (Comma Separated Value) file:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Select the **Read the resource information from a file** radio button.
6. When importing CAD resources **ONLY**, select one of the following options:

NOTE: For all other data source types other that CAD data sources, skip to step 7.

- **Keep the existing resources** - existing resources are kept during the import process.
- **Overwrite the existing resources** - resources are overwritten during the import process.

7. Click the **Next** button and at the **Select File** screen, do one of the following:
   - Click the **Browse** button and browse to the folder location where the CSV file is stored. Once the CSV file has been located, click the **Open** button.
   - Enter the folder location for the CSV file in the text box provided.
8. Click the **Import** button.
9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.
10. Do one of the following:
    - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
    - Once the import process is complete, click the **Close** button to close the dialog.
11. At the **Wizard Complete** screen click the **Finish** button to exit the wizard.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

8.5 Exporting resources as a CSV file

NOTE: Specific terminology is used when navigating the tree pane to export resources as a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Exporting resources as a CSV file is the same procedure for all data sources that support this function.

▸ To export a resources file in CSV (Comma Separated Value) file format:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Export** button and the **Export Resources** dialog is presented.
5. Click the **Browse** button and browse to the location to export the resources.
6. Enter the required **File name** ensuring that the **File type** is set to **CSV** and click the **Save** button.

7. On completion, click the **OK** button.

8. A progress dialog is presented providing a summary of the resources that are being exported.

9. Do one of the following:

   – Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the export process completes, unless an error has occurred.

   – Once the export process is complete, click the **Close** button to close the dialog.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

8.6 Adding an NLS audio resource manually

NOTE: Specific terminology is used when navigating the tree pane to add an NLS audio resource manually. For help with this terminology, refer to Tree structure terminology (see page 4).

To add an NLS audio resource manually:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NLS audio data source** node.

3. Click the **Resources** tab. The **Resources** page is presented.

4. Click the **Add** button. The **Add Resource** dialog is presented.

5. Enter the following details and where applicable use the text boxes provided:

   – **Resource type -** click the down arrow and select the required resource type so that the NICE Inform applications can group resource by type (Telephony, Radio, Generic Audio or Maintenance).

   – **Reference -** click the down arrow and select the required reference type for the underlying resource (Channel, Agent ID Extension Number, Talkgroup ID or Radio ID). Click the **Browse** ... button to display the **Enter Resource Reference** dialog. This dialog is only available if the NLS Resource is set to **Channel**. It shows the logger ID for all loggers associated with the NiceCLS. The fields are editable so you can change the Logger ID and Channel number details.

   – **Label -** a unique meaningful name that identifies the resource.

   – **Pair -** used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select the resource to pair with.

a. Select one of the following:

- **Recording systems** - resources are listed by sites and data sources.
- **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results refer to *Viewing paired results in NICE Inform Reconstruction*.

– **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary resource of the pairing. Otherwise, it becomes the secondary resource and the other resource in the pair becomes the primary.

6. On completion, click the **Add** button to add the resource.

NOTE: The Add Resource dialog remains open to enable you to add further resources if required. Once finished, click the **Close** button to close the dialog.

8.7 Editing and deleting an NLS audio resource

NOTE: Specific terminology is used when navigating the tree pane to edit and delete an NLS audio resource. For help with this terminology, refer to Tree structure terminology (see page 4).

An NLS audio data source incorporates two data source types. These are NiceCLS 8.9/9.0 and NiceLog loggers only audio.

Editing an NLS audio resource

To edit an NLS audio resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NLS audio data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Do one of the following:

– Double-click the required resource.

- Select the required resource and click the **Edit** button.

NOTE: In both cases, the **Edit Resource** dialog is presented.

5. Edit one or more of the following and where applicable use the text boxes provided:

   - **Resource type** - click the down arrow and select the required resource type so that the NICE Inform applications can group resource by type (Telephony, Radio, Generic Audio or Maintenance).
   - **Reference** - click the down arrow and select the required reference type for the underlying resource (Channel, Agent ID, Extension Number, Talkgroup ID or Radio ID). Click the **Browse** ... button to display the **Enter Resource Reference** dialog. This dialog is only available if the NLS audio resource is set to Channel. It shows the logger ID for all loggers associated with the NLS audio data source. The fields are editable so you can change the Logger ID and Channel number details.
   - **Label** - a unique meaningful name that identifies the resource.
   - **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select a new resource to pair with.

   a. Select one of the following:

      - **Recording systems** - resources are listed by sites and data sources.
      - **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

   b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results in NICE Inform Reconstruction, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

   - **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary source of the pairing. Otherwise, it becomes the secondary source and the other source in the pair becomes the primary.

6. On completion, click the **Save** button. Any changes made to the NLS audio resource are now saved.

NOTE: Any users that require access to this resource have to log out and back in again to NICE Inform once the change to the resource has been made.

Deleting NLS audio resources

- To delete NLS audio resources:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NLS audio data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Select the required resource or resources (by using Microsoft Windows standard Shift and Ctrl methods) and click the **Delete** button. A message is presented confirming the deletion.
5. Click the **Yes** button.

The resources are now deleted.

NOTE: Before deleting and removing resources, ensure that any required voice recordings held on the resource have been saved as incidents or WAV files. You **CANNOT** access the recordings once the resources have been removed.

8.8 NiceCLS settings

NOTE: Specific terminology is used when navigating the tree pane to configure NiceCLS settings. For help with this terminology, refer to Tree structure terminology (see page 4).

The Settings page is where you can configure NiceCLS replication and NICE Storage Center™ settings for the NLS audio data source.

- To configure the NiceCLS settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NLS audio data source** node.
3. Click the **Settings** tab and the **Settings** page is presented.

This page is sub-divided into the following sections:

- Replication (see page 85)
- NICE Storage Center™ (see page 86)
- Security Key Servers (see page 88)
- Media Library Server (see page 89)
- Resources Mapping (see page 89)

8.8.1 Replication

NOTE: In order to configure NiceCLS replication you **MUST** be licensed for NiceCLS replication (refer to Importing licensing details (see page 188)).

The Replication feature allows the SQL replication to be configured for any NiceCLS in the system. This creates a dynamic backup of the information in the NiceCLS (including Calls, Annotations, Inserter records and location information (e.g. ANI/ALI). The backup is intended to provide a quick recovery of historic data in a disaster situation.

NOTE: The backup database and transaction log are configured to automatically grow without limit. If these settings are inappropriate for your site, please configure as required using your SQL management tools once you have configured the replication.

Adding a new server

- To add a new replication server:

1. Click the **Add** button and the **Add server** dialog is presented.
2. Do one of the following:
   - Click the drop down arrow and select the required server from the **Available servers** list.
   - Enter the host name for the server in the text box.

NOTE: If NICE Inform is using a NiceCLS replication server, you are notified of the server name that it is being replicated to.

The server name is case sensitive and has to match exactly with the name that was initially created.

3. In the **Database path** text box, either enter a path or leave the default settings. The default path includes the SQL instance name to ensure that all SQL instance database paths are unique.

NOTE: The **Force snapshot** box forces a database copy which should **ONLY** be used if the original replication server was not setup recently. This check box is only enabled if a there is a replication server already configured.

4. Click the **OK** button. The server (or servers) is now displayed in the **Servers** table.

NOTE: If it is required to add more servers, repeat this process.

5. Click the **Save** button to configure the server (or servers). A progress dialog is displayed providing status information.

NOTE: The process of configuring the server can take a considerable amount of time.

Servers table

The Servers table displays the following information:

NOTE: Apart from the ℹ column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 8-3: NiceCLS Replication Servers table columns

Column	Description
ℹ	An ✖ icon is displayed if there is an error backing up a server.
Takeover	Check this box to use this server as the backup providing archived data. Searching for recordings now use this location. NOTE: You should **ONLY** check the **Takeover** box when your NiceCLS has irretrievably failed. NICE Inform writes any further annotations to this backup. Once selected, you are presented with a message asking you to confirm the takeover of the master NiceCLS and that this change **CANNOT** be undone. To continue click the **Yes** button and to commit the change, click the **Save** button.
Status	The status of the server e.g. whether it is active or not configured for replication.
Last known working at	The date/time when the server was last known to be working.
Last checked at	The date/time when the server was last checked (polled).

Removing a server

- To remove a server from the Servers table:

1. Select the required server from the **Servers** table.
2. Click the **Remove** button and the server is now removed from the **Servers** table.
3. Click the **Save** button.

NOTE: The process of configuring the server can take a considerable amount of time.

8.8.2 NICE Storage Center™

The NICE Storage Center™ section allows you to configure a path mapping (if required) that is used when audio is retrieved from the NICE Storage Center.

NICE Inform requires a network share path in order to retrieve audio from the NICE Storage Center (refer to *NICE Inform Installation Guide* for details). If the NiceCLS database contains records linked to a path that is local to the NICE Storage Center, a mapping must be created in order for audio to be successfully retrieved.

For example, the NICE Storage Center has been configured with a path: *D:\Storage Center\Loggers Group 1* and consequently the NiceCLS database contains records linking to audio files such as:

D:\Loggers Group 1\2007_Mar_14\SC_21022007_120701_21022007_120713_33_911.nmf

NICE Inform must use the network share, for example, \\StorageCenterServer\FileShare\ which has been created to map onto D:\

In this case the **Local path** should be entered as: D:\ and the **Share path** should be entered as: \\StorageCenterServer\FileShare\

NICE Inform then links to the audio file as:

\\StorageCenterServer\FileShare\LoggersGroup1\2007_Mar_14\SC_21022007_120701_21022007_120713_33_911.nmf

NOTE: The path replacement only takes place from the first (left most) character and the Local path must be matched exactly for the replacement to take place (the checking is case insensitive).

If audio calls archived on a Storage Center share cannot be retrieved (i.e. the audio is always retrieved from the logger), you **MUST** ensure that the Microsoft Windows user account used to run the NICE Inform Server service under also has access to the server used by the Storage Center to archive the audio files. For help performing this check, please refer to the *NICE Inform Troubleshooting Guide* which is supplied on your NICE Inform release media and on ExtraNICE.

Adding a new NICE Storage Center path

- To add a new NICE Storage Center path:

1. Click the **Add** button and the **Add Path** dialog is presented.
2. Enter the **Local path** e.g. D:\ (the path local to the NICE Storage Center) and the **Share path** (the path name on the network e.g. \\StorageCenterServer\FileShare\).

NOTE: You **MUST** enter a backslash at the end of the paths.

The UNC share path must be accessible on the network with proper name resolution.

3. Click the **OK** button followed by the **Save** button.

   The new path is now displayed within the **Paths** table.

Editing a NICE Storage Center path

- To edit an existing NICE Storage Center path:

1. Select the required path from within the **Paths** table.
2. Click the **Edit** button and the **Edit Path** dialog is presented.
3. Edit either the **Local path** or **Share path** as required.
4. Click the **OK** button followed by the **Save** button.

The updated path is now displayed within the **Paths** table.

Removing a NICE Storage Center path

- To remove a NICE Storage Center path:

1. Select the required path from within the **Paths** table.
2. Click the **Remove** button followed by the **Save** button.

   The path is now removed from the **Paths** table.

8.8.3 Security Key Servers

This section displays all security keys servers that are currently assigned to the NLS audio data source. For more information about security key servers, refer to Site settings (see page 11).

Assigning a security key server

- To assign a security key server to the NLS audio data source:

1. Click the **Assign** button and the **Assign Server** dialog is presented.
2. Select the required security key server or a selection of servers (using Microsoft Windows standard Shift and Ctrl methods).
3. Click the **OK** button followed by the **Save** button.

The assigned security key server (or servers) is now displayed within the **Servers** table.

The columns displayed in the Servers table are:

NOTE: Apart from the ℹ column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 8-4: Security Key Servers table

Column	Description
ℹ	An icon displayed if the security key server is uncontactable.
Label	The label (or name) entered for the security key server.
Network address	The hostname or IP address for the security key server.
Port	The port used to connect to the security key server.
Server type	The type of security key server.
Security token	The security token provided for the security key server.

Removing a security key server

- To remove a security key server from the NLS audio data source:

1. Select the required security key server or a selection of servers (using Microsoft Windows standard Shift and Ctrl methods) from within the Servers table.

2. Click the **OK** button followed by the **Save** button.

The security key server is now removed from the NLS audio data source.

8.8.4 Media Library Server

Any Media Library servers that have been added within the NLS page are available for selection here (refer to NLS audio settings (see page 25)).

▸ To add a Media Library server for this NiceCLS:

1. Click the down arrow and select the required Media Library server from the list.

NOTE: Leaving the **Default** option selected means that the default Media Library server on the data source is used instead of a central Media Library server that has been added on the NLS page.

2. Click the **Save** button.

8.8.5 Resources mapping (NiceCLS settings

The Resource Mapping section enables you to set switch mappings for the NiceCLS data source so they are automatically populated when you import resources (refer to Importing NLS audio resources from a data source (see page 78)).

The following resource mapping options are available:

- **Enable automatic import of resources** - check the box and for each switch ID, click the drop down arrow and select the default resource type from the list. These resources will now be automatically imported periodically using these settings.
- **Assign automatically imported resources to group** - if required, resources can be automatically assigned to a resource group when they are imported. To configure this, click the **Browse** ... button and the **Select The Resource Group To Assign Automatically Imported Resources To** dialog is presented. Select the required **Resource group** from within the **Groups** tree and then select the resources to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

8.9 CSV resources file details

When importing and exporting resources as a CSV (comma separated value) file, the details resemble something like the following example as shown here:

Figure 8-1: CSV resource file

	A	B	C	D	E	F	G	H
1	System Type:	NiceLogCls89						
2	Fields:	Resource Label	Resource Type	Reference Type	Reference	LoggerID	Pair Label	Priority
3	Resource:	ATC 01	Radio	ChannelId	9	10098765		None
4	Resource:	ATC 02	Radio	ChannelId	10	10098765		None
5	Resource:	ATC 03	Radio	ChannelId	11	10098765		None
6	Resource:	ATC 04	Radio	ChannelId	12	10098765		None
7	Resource:	ATC 05	Radio	ChannelId	13	10098765		None
8	Resource:	ATC 06a	Radio	ChannelId	14	10098765	ATC 06b	Primary
9	Resource:	ATC 06b	Radio	ChannelId	15	10098765	ATC 06a	Secondary

Row 1 must contain System Type information which can be one of the following:

- **NICERecordingPro** (for a NICE Recording/NICE Inform Recorder data source).
- **NiceLogCls89** (for an NLS audio data source).
- **PerformDataHub** (for a NICE Interaction Management/NICE Perform data source).
- **VpiLogger** (for a VPI Audio Logger data source).

Each subsequent column is described in the following table. Each data source that is applicable to each column is also identified.

NOTE: Columns vary depending on the data sources and associated resources you have exported.

Table 8-5: CSV resource file details

Column	Description	NR/NIR*	NLS Audio	NIM**	VPI***	CAD
Resource Label	The label (name) for the resource.	X	X	X	X	X
Resource Type	The type of resource. Permitted values are Telephony, Video, Radio, Direct, GIS, Video, User or screen	X	X	X	X	X
Reference Type	The resource reference type. Permitted values are ChannelId, AgentId, TalkGroupId, ExtensionId, LoggerChannelPair, SwitchId or AgentId.	X	X	X	X	
Reference	The ID of the Channel, Agent, TalkGroup or Sensor.	X	X	X	X	X
LoggerId	The unique logger Id applicable to channel reference types only.		X	X	X	
Pair Label	The resource label of a channel connected to the same input where paired channels are in use.	X	X	X		
Priority	Only for use where a Pair Label has been entered. Permitted values are Primary or Secondary.	X	X	X		

Column	Description	NR/NIR*	NLS Audio	NIM**	VPI***	CAD
NICE Recording Reference	The NICE Recording reference ID.	X				
SwitchId	The Id generated for the switch when it is added.			X		
PhysicalSwitchId	The Id given to the switch within the NICE Perform Application server.			X		

*NICE Recording/NICE Inform Recorder

**NICE Interaction Management

***VPI Audio Logger

8.10 Importing resources from a CSV file

NOTE: Specific terminology is used when navigating the tree pane to import resources from a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Importing resources from a CSV file is the same procedure for all data sources that support this function.

To import resources from a CSV (Comma Separated Value) file:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Select the **Read the resource information from a file** radio button.
6. When importing CAD resources **ONLY**, select one of the following options:

NOTE: For all other data source types other that CAD data sources, skip to step 7.

   - **Keep the existing resources** - existing resources are kept during the import process.
   - **Overwrite the existing resources** - resources are overwritten during the import process.

7. Click the **Next** button and at the **Select File** screen, do one of the following:
   - Click the **Browse** button and browse to the folder location where the CSV file is stored. Once the CSV file has been located, click the **Open** button.

- Enter the folder location for the CSV file in the text box provided.

8. Click the **Import** button.
9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.
10. Do one of the following:
    - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
    - Once the import process is complete, click the **Close** button to close the dialog.
11. At the **Wizard Complete** screen click the **Finish** button to exit the wizard.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

8.11 Exporting resources as a CSV file

NOTE: Specific terminology is used when navigating the tree pane to export resources as a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Exporting resources as a CSV file is the same procedure for all data sources that support this function.

▸ To export a resources file in CSV (Comma Separated Value) file format:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Export** button and the **Export Resources** dialog is presented.
5. Click the **Browse** button and browse to the location to export the resources.
6. Enter the required **File name** ensuring that the **File type** is set to **CSV** and click the **Save** button.
7. On completion, click the **OK** button.
8. A progress dialog is presented providing a summary of the resources that are being exported.
9. Do one of the following:

- Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the export process completes, unless an error has occurred.
- Once the export process is complete, click the **Close** button to close the dialog.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

9 NICE Interaction Management data sources

NICE Interaction Management data source is the new name for NICE Perform data sources. The functions when configuring a NICE Perform and NICE Perform eXpress data source are identical to that of a NICE Interaction Management data source.

This section covers all the available functions when configuring your NICE Interaction Management data sources:

9.1 Editing a NICE Interaction Management data source

NOTE: Specific terminology is used when navigating the tree pane to edit a NICE Interaction Management data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The functions when configuring a NICE Perform or a NICE Perform eXpress data source are identical to that of a NICE Interaction Management data source. Please refer to the instructions for a NICE Interaction Management data source.

- To edit a NICE Interaction Management data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Click the **General** tab and the **General** page is presented.
4. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - the name of the data source.

- **Authentication** - select one of the following:
  - **SQL Server Authentication** - if you use Microsoft SQL Server to connect to the NICE Interaction Management database.
  - **Windows Authentication** - if you use Windows authentication to connect to the NICE Interaction Management database. Selecting this option disables the **SQL username** and **SQL password** options.

NOTE: For more information regarding SQL authentication or Windows authentication please refer to the *NICE Perform for Public Safety Installation Guide* on the NICE Inform installation release media.

- **SQL username** - the SQL username.
- **Network address** - the hostname or IP address for the data source.
- **SQL password**:
  (1) Click the **Set** button. The **Set SQL Password** dialog is presented.
  (2) Change the SQL password in the **Password** text box, and then repeat in the **Confirm password** text box.
  (3) Click the **OK** button. If there are no errors, the dialog closes.
- **Use a named SQL Server instance** - check the box and the following option is enabled:
  - **Name** - the SQL instance name used to host the NICE Interaction Management database.

NOTE: The named SQL Server instance option is **ONLY** applicable to NICE Perform and NICE Perform eXpress data sources and **NOT** NICE Interaction Management data sources.

5. On completion, click the **Save** button.

Logger available storage

Available logger storage space is displayed within the **Loggers** table in the bottom section of the General page. Information provided here includes:

NOTE: Apart from the i and **Online storage space** columns, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 9-1: Loggers table columns (NICE Interaction Management data source)

Column	Description
i	An icon is displayed if there is an error connecting to a logger.
Name	The name of the logger.
Network address	The hostname or IP address of the logger.
Online storage space	A colored bar displaying used and backed up space on the logger as a blue bar and the free space as a white bar. Hover the cursor over the bar to display a tooltip providing a percentage of free space, amount backed up and not backed up. This is **ONLY** relevant to removable media and does **NOT** include Storage Center™ data. If it is not possible to connect to the logger then the text *Unavailable* is displayed.

To update the available storage space for the loggers, click the **Refresh data** button.

9.2 Deleting a NICE Interaction Management data source

NOTE: Specific terminology is used when navigating the tree pane to delete a NICE Interaction Management data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The functions when configuring a NICE Perform or a NICE Perform eXpress data source are identical to that of a NICE Interaction Management data source. Please refer to the instructions for a NICE Interaction Management data source.

Before deleting a NICE Interaction Management data source, ensure that any required recordings held on the logger have been saved as incidents or as WAV or WMA files. You **CANNOT** access the recordings if the logger has been removed as all resources associated with this NICE Perform data source are deleted.

To delete a NICE Interaction Management data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node for deletion.
3. In the button bar, click the **Delete data source** button. A confirmation message is presented confirming the deletion.
4. Click the **Yes** button.

The NICE Interaction Management data source is removed from the tree pane.

9.3 Importing NICE Interaction Management resources from a data source

NOTE: Specific terminology is used when navigating the tree pane to import NICE Interaction Management resources from a data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The functions when configuring a NICE Perform or a NICE Perform eXpress data source are identical to that of a NICE Interaction Management data source. Please refer to the instructions for a NICE Interaction Management data source.

To import NICE Interaction Management resources from a data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.

3. Click the **Resources** tab. The **Resources** page is presented.

4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.

5. Select the **Read the resource information from the data source** radio button and click the **Next** button.

6. At the **Specify Switch Mappings** screen, the options are different depending whether you are importing resources for your NICE Interaction Management data source in Maintenance mode or not.

   You have the following two Switch Mappings screen options that you may encounter.

   – **Maintenance mode Disabled**: Select the predominant resource type for each switch.

   – **Maintenance mode Enabled**: When importing switch data, check the **Import switch mappings** check box, then select the predominant resource type for each switch. You can also check the **Import maintenance channels** check box. This enables logger channels to be imported so that they can be referenced directly to the channels on the logger, which is useful for fault-finding.

NOTE: The Import maintenance channels option is **ONLY** available if you are in **Maintenance mode**. To enable this mode, (refer to Editing site details (see page 10)).

7. To import screen resources for each agent and telephone extension, check the **Create a screen resource for each telephony agent** box.

NOTE: A screen resource is added with the same reference for each extension and agent resource.

8. Click the **Import** button.

9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.

10. Do one of the following:

    – Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.

    – Once the import process is complete, click the **Close** button to close the dialog.

11. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

9.4 Importing resources from a CSV file

NOTE: Specific terminology is used when navigating the tree pane to import resources from a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Importing resources from a CSV file is the same procedure for all data sources that support this function.

To import resources from a CSV (Comma Separated Value) file:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Select the **Read the resource information from a file** radio button.
6. When importing CAD resources **ONLY**, select one of the following options:

NOTE: For all other data source types other that CAD data sources, skip to step 7.

   – **Keep the existing resources** - existing resources are kept during the import process.
   – **Overwrite the existing resources** - resources are overwritten during the import process.
7. Click the **Next** button and at the **Select File** screen, do one of the following:
   – Click the **Browse** button and browse to the folder location where the CSV file is stored. Once the CSV file has been located, click the **Open** button.
   – Enter the folder location for the CSV file in the text box provided.
8. Click the **Import** button.
9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.
10. Do one of the following:
   – Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
   – Once the import process is complete, click the **Close** button to close the dialog.
11. At the **Wizard Complete** screen click the **Finish** button to exit the wizard.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

9.5 Exporting resources as a CSV file

NOTE: Specific terminology is used when navigating the tree pane to export resources as a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Exporting resources as a CSV file is the same procedure for all data sources that support this function.

To export a resources file in CSV (Comma Separated Value) file format:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Export** button and the **Export Resources** dialog is presented.
5. Click the **Browse** button and browse to the location to export the resources.
6. Enter the required **File name** ensuring that the **File type** is set to **CSV** and click the **Save** button.
7. On completion, click the **OK** button.
8. A progress dialog is presented providing a summary of the resources that are being exported.
9. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the export process completes, unless an error has occurred.
   - Once the export process is complete, click the **Close** button to close the dialog.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

9.6 Adding a NICE Interaction Management resource manually

NOTE: Specific terminology is used when navigating the tree pane to add a NICE Interaction Management resource manually. For help with this terminology, refer to Tree structure terminology (see page 4).

The functions when configuring a NICE Perform or a NICE Perform eXpress data source are identical to that of a NICE Interaction Management data source. Please refer to the instructions for a NICE Interaction Management data source.

To add a NICE Interaction Management resource manually:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Click the **Add** button. The **Add Resource** dialog is presented.
5. Enter the following details and where applicable use the text boxes provided:
   - **Resource type** - click the down arrow and select the required resource type so that the NICE Inform applications can group resource by type (Telephony, Radio, Generic Audio or Screen).
   - **Reference** - click the down arrow and select the required reference type for the underlying resource (Channel, Agent ID or Extension Number). Click the **Browse** ... button to display the **Enter Resource Reference** dialog. This dialog is only available if the NICE Interaction Management Resource is set to **Channel**. It shows the logger ID for all loggers associated with the NICE Perform data hub. The fields are editable so you can change the Logger ID and Channel number details.
   - **Switch** - click the down arrow and select the required switch connected to the resource you are adding. This option is only available if the **Reference type** has been set to either **Agent ID** or **Extension Number** or the **Resource type** has been set to **Screen**.
   - **Label** - a unique meaningful name that identifies the resource.
   - **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select the resource to pair with.

   a. Select one of the following:
      - **Recording systems** - resources are listed by sites and data sources.
      - **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results in NICE Inform Reconstruction, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

– **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary resource of the pairing. Otherwise, it becomes the secondary resource and the other resource in the pair becomes the primary.

6. On completion, click the **Add** button to add the resource.

NOTE: The Add Resource dialog remains open to enable you to add further resources if required. Once finished, click the **Close** button to close the dialog.

9.7 Editing and deleting a NICE Interaction Management resource

NOTE: Specific terminology is used when navigating the tree pane to edit and delete a NICE Perform resource. For help with this terminology, refer to Tree structure terminology (see page 4).

The functions when configuring a NICE Perform eXpress data source are identical to that of a NICE Perform data source.

Editing a NICE Interaction Management resource

To edit an existing NICE Interaction Management resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Do one of the following:
   – Double-click the required resource.
   – Select the required resource and click the **Edit** button.

NOTE: In both cases, the **Edit Resource** dialog is displayed.

5. Edit one or more of the following and where applicable use the text boxes provided:

   - **Resource type** - click the down arrow and select the required resource type so that the NICE Inform applications can group resource by type (Telephony, Radio, Generic Audio, Screen or Maintenance).
   - **Reference** - click the down arrow and select the required reference type for the underlying resource (Channel, Agent ID or Extension Number). Click the **Browse** ... button to display the **Enter Resource Reference** dialog. This dialog is only available if the NICE Interaction Management Resource is set to **Channel**. It shows the logger ID for all loggers associated with the NICE Interaction Management data hub. The fields are editable so you can change the Logger ID and Channel number details.
   - **Switch** - click the down arrow and select the required switch connected to the resource you are adding. This option is only available if the **Reference type** has been set to either **Agent ID** or **Extension Number** or the **Resource type** has been set to **Screen**.
   - **Label** - a unique meaningful name that identifies the resource.
   - **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select the resource to pair with.

   a. Select one of the following:

      - **Recording systems** - resources are listed by sites and data sources.
      - **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

   b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results in NICE Inform Reconstruction, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

   - **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary resource of the pairing. Otherwise, it becomes the secondary resource and the other resource in the pair becomes the primary.

6. On completion, click the **Save** button. Any changes made to the NICE Interaction Management resource are now saved.

NOTE: Any users that require access to this resource have to log out and back in again to NICE Inform once the change to the resource has been made.

Deleting NICE Interaction Management resources

▸ To delete a NICE Interaction Management resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Select the required resource or resources (by using Microsoft Windows standard Shift and Ctrl methods) and click the Delete button. A message is presented confirming the deletion.
5. Click the **Yes** button.

The resources are now deleted.

NOTE: Before deleting and removing a resource, ensure that any required voice recordings held on the resource have been saved as incidents, scenarios or as audio files. You **CANNOT** access the recordings once the resource has been removed.

9.8 NICE Interaction Management database details

NOTE: Specific terminology is used when navigating the tree pane to view details of the NICE Interaction Management databases. For help with this terminology, refer to Tree structure terminology (see page 4).

The functions when configuring a NICE Perform or a NICE Perform eXpress data source are identical to that of a NICE Interaction Management data source. Please refer to the instructions for a NICE Interaction Management data source.

▸ To view read-only details of the databases that have been configured in the NICE Interaction Management data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Click the **Database** tab and the **Database** page is presented.
4. The following details are displayed:
   - **Name -** the name of the NICE Interaction Management data source.
   - **Network address -** The hostname or IP address for the NICE Interaction Management data source.

5. NICE Interaction Management database status is displayed within the **Databases** table. Information provided here includes:

NOTE: Apart from the and **Fill status** columns, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 9-2: Databases table columns (NICE Interaction Management)

Column	Description
	An icon is displayed if there is an error connecting to a NICE Interaction Management database.
Name	The name of the NICE Interaction Management database.
Size (MB)	The current in Megabytes (MB) of the NICE Interaction Management database.
Fill status	The percentage of available storage space on the NICE Interaction Management database. Hover the cursor over the bar to display a tooltip providing a percentage of space used, the amount of space used (MB) and the total size of the database (MB).

To update the details for the NICE Interaction Management databases, click the **Refresh data** button.

9.9 Media Library server configuration

NOTE: Specific terminology is used when navigating the tree pane to view the Media Library servers configured in the NICE Interaction Management data source. For help with this terminology, refer to Tree structure terminology (see page 4).

The Media Library page is designed to provide you with a read-only view of all the Media Library servers configured in the NICE Perform data source.

The Media Library organizes all archiving media at a site by assigning sequential numbers to all these media types (DVD, DAT's etc.). These numbers are then printed automatically by the Media Library printer.

- To view all the Media Library servers configured in the NICE Interaction Management data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Click the **Media Library** tab and the **Media Library** page is presented.
4. All the Media Library servers are displayed in the associated table displaying the following information:

NOTE: Apart from the column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 9-3: Media Library servers table columns

Column	Description
i	An icon is displayed if there is an error connecting to the Media Library server.
Name	The name of the Media Library server
Hostname	The server that the Media Library server is installed on.
Printer name	The name of the Media Library printer.
Logger	The logger associated with the Media Library printer.

9.10 Media Interconnect configuration

Media Interconnect enables NICE Perform/NICE Perform eXpress data sources to be treated as logging systems of a NICE Interaction Management system. These sub-data sources are called 'external' data sources. Media Interconnect copies the call records generated on the external data sources into the main NICE Interaction Management data source.

In NICE Inform, a search for calls on the NICE Interaction Management also finds calls recorded by external data sources. If the call audio from the external data sources is also copied to a Storage Center connected to the NICE Interaction Management system, the calls can be searched and replayed in NICE Inform by only using the NICE Interaction Management data source resources.

- The NICE Inform configuration for Media Interconnect requires the following steps:

1. Add the external data sources (refer to Adding a data source (see page 17)) as stand-alone data sources within NICE Inform and import their resources (refer to Importing NICE Interaction Management resources from a data source (see page 96)).
2. Map the NICE Inform data source to the NICE Interaction Management external data source within the Mapped Data Sources table (see below)
3. Import the resources for the NICE Interaction Management data source (refer to Importing NICE Interaction Management resources from a data source (see page 96)).

NOTE: The name of the external data source is prefixed to the resource label (name) so that you can see the association between the resources and the data source e.g. NPX1_channel1012 (where **NPX1** is the data source name and **channel1012** is the resource label).

- To map the NICE Inform data source to a NICE Interaction Management external data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.

3. Click the **Media Interconnect** tab and the **Media Interconnect** page is presented.

4. Select the required NICE Interaction Management external data source from within the Mapped Data Sources table and do one of the following:

   – Double-click the required external data source.

   – Click the **Edit** button.

NOTE: In both cases, the **Edit Mapped Data Sources** dialog is presented.

5. Click the drop down arrow and select the NICE Inform data source from the list.

6. On completion, Click the **Save** button. The NICE Inform data source is now mapped to a NICE Interaction Management external data source.

7. Click the **Save** button.

External mapped data source states

The following icons are displayed in the Information (i) column within the Mapped Data Sources table:

- - displayed if the NICE Interaction Management external data source has not been mapped to a NICE Inform data source.
- - displayed if one or more channel resources on the NICE Interaction Management external data source are missing in the NICE Inform data source.

NOTE: The external data source map is successful if there are no icons displayed within the Information (i) column.

10 Configuring NICE Interaction Management database backups

NOTE:	Specific terminology is used when navigating the tree pane to back up a NICE Interaction Management database. For help with this terminology, refer to Tree structure terminology (see page 4). Tape backups have to be queried to show the contents, which might take some time. The functions when configuring NICE Perform or NICE Perform eXpress database backups are identical to that of a NICE Interaction Management database backups. Please refer to the instructions for a NICE Interaction Management data source. You **CANNOT** complete a Nice Log Backup or Nice Differential Backup before first performing a Nice Full Backup.

All NICE Interaction Management databases and system databases that are used by NICE Interaction Management can be backed up using the **Backup Configuration Wizard** in the System Administration application.

A backup device is created for each NICE Interaction Management database and is located on the same drive as the NICE Interaction Management databases. By navigating the tree pane, you can view any backups that exist on the device.

- To configure NICE Interaction Management database backups:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Select the **Database Backups** node. The **Backup Schedule** page is presented.

This section covers the following areas:

- Configuring a NICE Interaction Management scheduled database backup (see page 107)
- Starting a scheduled NICE Interaction Management backup (see page 109)
- Configuring the backup destination path (see page 109)
- Restoring a NICE Interaction Management backup (see page 110)
- NICE Interaction Management database backup device (see page 110)

10.1.1 Configuring a NICE Interaction Management scheduled database backup

- To configure a NICE Interaction Management scheduled database backup:

1. Within the **Backup Schedules** table, do one of the following:

- Select the required scheduled backup and click the **Configure schedule** button.
- Double-click the required scheduled backup.

NOTE: In both cases, the **Configure Schedule** dialog is presented.

The options available on the Configure Schedule dialog can vary depending on the backup schedule you are configuring.

The name of the backup schedule is displayed for your information only.

2. To enable the backup schedule, check the **Schedule enabled** box. To disable the backup schedule, uncheck the **Schedule enabled** box.
3. In the **Occurs** section, select one of the following:
   - **Daily** - the database backup is scheduled daily. Select one of the following:
     - **At specified backup time** - the backup occurs at the time specified within the **Time** section.
     - **At specified interval** - the backup occurs at a specified time interval. Enter the time interval (in minutes) in the text box provided or by using the up/down arrows.
   - **Weekly** - the database backup is scheduled weekly. Set the required day (or days) of the week by checking the associated box (or boxes).

NOTE: You **MUST** select at least one day.

   - **Monthly** - the database backup is scheduled monthly. Click the down arrow and select the required day of the month.
4. In the **Time** section, the following option is available:
   - **Backup time** - the time of the day that the backup is scheduled. Enter the time using the text box provided. Time entry is assisted by either selecting the hours, minutes or AM/PM and then using the up/down arrows.
5. Once you have configured the database backup schedule, click the **OK** button.

The scheduled backup is now updated in the **Backup Schedules** table.

The **Backup Schedules** table displays the following information:

NOTE: Apart from the i column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 10-1: Backup Schedules table columns

Column	Description
i	An icon is displayed if the database backup schedule was unsuccessful.
Schedule name	The name of the database backup schedule.
Databases	The databases backed up when running the backup schedule.

Column	Description
Device path	The Microsoft SQL backup device path.
Occurrence	The occurrence of the backup schedule e.g. what day of the week, or whether it is daily or monthly.
Time	The time the backup is scheduled for.
Last run time	The date/time when the last backup schedule ran.
Last run outcome	The outcome of the last scheduled database backup (either succeeded or failed).
Status	The current status of the backup schedule (idle, running or disabled).

10.1.2 Starting a scheduled NICE Interaction Management backup

- To start a scheduled NICE Interaction Management backup:

1. Within the **Backup Schedules** table, select the required scheduled backup.
2. Click the **Start backup** button and you are presented with a dialog confirming the backup has started successfully.
3. Click the **OK** button.

NOTE: Disabled backup schedules **CANNOT** be run immediately.

10.1.3 Configuring the backup destination path

- To configure the backup destination for all default backups on the backup devices.

1. Click the **Configure backup destination** button and the **Configure Destination dialog** is presented.
2. Select one of the following:
   – **Tape** - the destination of the backup is stored on a connected tape backup device.
   – **Device path** - enter the device path using the associated text box for all backup devices. This can either be a physical drive location (e.g. *c:\backup\device1*) or a network share (e.g. \\<*server name*>*backup**device1*).

NOTE: The backup is stored in the specified device path.

You **MUST** ensure that the path exists on the server.

3. Click the **OK** button.

All subsequent database backups now follow this new destination.

10.1.4 Restoring a NICE Interaction Management backup

You can restore a backup once you have performed a scheduled backup by using SQL Server Management Studio.

10.1.5 NICE Interaction Management database backup device

NOTE: Specific terminology is used when navigating the tree pane to view the backup device. For help with this terminology, refer to Tree structure terminology (see page 4).

- To view the details of all the NICE Interaction Management database backups that are stored on a particular backup device:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Expand the **Database Backups** node and then expand the **Backup Device** node. The **Backup Device** page is presented.

NOTE: A backup device is created for each NICE Interaction Management database upon installation of NICE Interaction Management.

4. The following backup device details are displayed:

Table 10-2: Backup device table columns

Column	Description
Backup name	The name of the backup stored on the backup device.
Database	The NICE Inform database that has been backed up on the backup device.
Date	The date/time that the backup was performed.
Description	The description entered when creating a backup
Size	The size (MB) filled on the backup device for the NICE Interaction Management database.

10.2 NICE Interaction Center

NOTE: Specific terminology is used when navigating the tree pane to view details of the NICE Interaction Center. For help with this terminology, refer to Tree structure terminology (see page 4).

- To view read-only details of the NICE Interaction Center:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.

3. Select the **NICE Interaction Center** node.

NOTE: If this is the first time you have added your NICE Interaction Management data source you need to click the **Refresh data** button to display the NICE Interaction node.

4. Select the **General** tab and the **General** page is presented.

5. The following logger NICE Interaction Center settings are displayed:

   – **Label -** the label (name) for the NICE Interaction Center.

   – **Network address -** the hostname or IP address for the NICE Interaction Center.

   – **Description -** the description (if entered) for the NICE Interaction Center.

Logger available storage

Available logger storage space is displayed within the **Loggers** table. Information provided here includes:

NOTE: Apart from the and **Online storage space** columns, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 10-3: Loggers table columns (NICE Interaction Center)

Column	Description
	An icon is presented if there is an error connecting to a logger.
Name	The name of the logger.
Network address	The hostname or IP address of the logger.
Online storage space	A colored bar displaying used and backed up space on the logger as a blue bar and the free space as a white bar. Hover the cursor over the bar to display a tooltip providing a percentage of free space, amount backed up and not backed up. This is **ONLY** relevant to removable media and does **NOT** include NICE Storage Center™ data. If it is not possible to connect to the logger then the text 'Unavailable' is displayed.

To update the available storage space for the loggers, click the **Refresh data** button.

10.2.1 NICE Interaction Center settings

NOTE: Specific terminology is used when navigating the tree pane to view the NICE Interaction Center settings. For help with this terminology, refer to Tree structure terminology (see page 4).

To view the settings for the NICE Interaction Center:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.

3. Select the **NICE Interaction Center** node.

NOTE: If this is the first time you have added your NICE Interaction Management data source, you need to click the **Refresh data** button to display the NICE Interaction node.

4. Click the **Settings** tab and the **Settings** page is presented.

5. The following settings are available:

   – **All calls voice recording** - check the box to enable recording of all voice calls. Uncheck the box in order to record selective calls.

   – **All calls screen recording** - check the box to enable recording of all screens. Uncheck the box in order to record selective screens.

10.2.2 Logger details

NOTE: Specific terminology is used when navigating the tree pane to view logger details. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To view the details of a logger that is assigned to a NICE Interaction Center:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.

3. Expand the **NICE Interaction Center** node and select the required logger.

4. Click the **General** tab and the **General** page is presented.

5. The logger details are displayed as in the table below.

6. If you have changed the online storage alarm settings, click the **Save** button.

Table 10-4: Logger Details table columns (NICE Interaction Center)

Column	Description
Label	The name (label) of the logger.
Network address	The hostname or IP address of the logger.
Logger ID	The unique logger ID.
Version	The specific version of the logger.
Recording channels	The number of recording channels that the logger supports.
Online capacity	The maximum capacity (hours) that is available on the logger associated with

Column	Description
(hours)	the audio logger supported compression types.
Boards	The type of boards in the logger. Types of boards may include:
Online storage space	A colored pie chart displaying free/backed up space on the logger as a yellow segment and used space that is not backed up as a blue segment. Hover the cursor over the bar to display a tool tip providing a percentage of free space, amount backed up and not backed up. This is **ONLY** relevant to removable media and does **NOT** include NICE Storage Center™ data. NOTE: If the logger reaches the online storage threshold, an icon is presented below the pie chart (with accompanying text) informing you that you have reached the threshold. You can also set an alarm when a percentage of available space on a logger has been reached by checking the **Raise an alarm when the used online storage reaches** box. Once checked, set a percentage value. When this value is reached by the logger online space, a storage alarm is raised. Set the percentage of available space into the text box provided. Entry is assisted by using the up/down arrows. This alarm can be viewed in the NICE Inform Audit application.

10.2.3 Screen logger details

NOTE: Specific terminology is used when navigating the tree pane to view screen logger details. For help with this terminology, refer to Tree structure terminology (see page 4).

To view the details of a screen logger that is assigned to a NICE Interaction Center:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Expand the **NICE Interaction Center** node and select the required logger.
4. Click the **General** tab and the **General** page is presented.
5. The following logger details are displayed:

Table 10-5: Screen Logger Details table columns (NICE Interaction Center)

Column	Description
Label	The name (label) of the screen logger.
Network address	The hostname or IP address of the screen logger.
Port	The port address of the screen logger.
Logger ID	The unique screen logger ID.

10.2.4 Logger settings

NOTE: Specific terminology is used when navigating the tree pane to configure logger settings. For help with this terminology, refer to Tree structure terminology (see page 4).

The Settings page is where you can configure the settings for selected logger.

To configure logger settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Expand the **NICE Interaction Center** node and select the required logger.
4. Click the **Settings** tab and the **Settings** page is presented.
5. If this is the first time you have clicked on the **Settings** tab since you logged into NICE Inform, the logger settings automatically refresh to ensure that they are the latest.
6. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the refresh process completes, unless an error has occurred.
   - Once the refresh process is complete, click the **Close** button to close the dialog.

The following sections are available:

Automatic Deletion Mode

There are two options available to you should the logger run out of disk space. Select one of the following:

- **Delete oldest audio -** the oldest audio is automatically deleted once the logger's disk space is full.
- **Stop recording -** all recording stops once the logger's disk space is full.

DTMF Parameters

In the DTMF Parameters section:

- If the logger supports DTMF (Dual-Tone Multi Frequency) Recording on Demand, enter:
  - The **Start** recording code in the associated text box.
  - The **End** recording code in the associated text box.

NOTE: If the logger does **NOT** support DTMF Start and Stop codes, then nothing is displayed and the text boxes are grayed out.

- In order to define DTMF detection, select one of the following:
  - **Save first 48 digits** - the logger saves the first 48 DTMF digits.
  - **Save last 48 digits** - the logger saves the last 48 DTMF digits (if more than 48 DTMF digits are detected).

Session Parameters

Define how each session length is determined within this section. The following options are available:

- **Minimum length between sessions** - two segments of active audio are considered separate audio segments if the specified number of seconds of silence is detected between them. Enter the minimum length between sessions (in seconds) into the associated text box or by using the provided up/down arrows. A valid range is 0-100 seconds between sessions.
- **Maximum session length** - the maximum number of seconds of active audio that can be considered an audio segment. Enter the maximum session length (in seconds) into the associated text box or by using the provided up/down arrows. A valid maximum session length is 1-18000 seconds.
- **Post session duration** - in the case of a timeout (inactive audio), this value is how many seconds of silence are needed before closing the session. Enter post session duration (in seconds) into the associated text box or by using the provided up/down arrows. A valid post session duration is 0-100 seconds and 0-15 seconds for VoIP loggers.

Logger Call Retention

This section provides the functionality of being able to perform an age-based deletion of the calls from the logger. Select one of the following:

- **Do not automatically delete calls based on age** - calls **CANNOT** automatically be deleted irrespective of how long they have been on the logger.
- **Delete calls older than** - enter the number of days after which calls are deleted on the logger by either entering the number into the available text box or by using the provided up/down arrows.

NOTE: Calls that have been on the logger for longer than the number of days set are automatically deleted.

- If you have changed the logger settings:

1. Click the **Save** button. A confirmation message is presented.
2. Click the **Yes** button to update the logger settings.

10.2.5 Viewing and editing channel settings

NOTE: Specific terminology is used when navigating the tree pane to view and update channel settings. For help with this terminology, refer to Tree structure terminology (see page 4).

- To view the settings of a channel (or channels) that is assigned to a NICE Interaction Center:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Expand the **NICE Interaction Center** node and select the required logger.
4. Click the **Channels** tab and the **Channels** page is presented.
5. If this is the first time you click on the Channels tab since you logged into NICE Inform, the logger channels automatically refresh to ensure that they are the latest.
6. Do one of the following:
   - Check the **Close dialog when complete** box, which, causes the dialog to close automatically shortly after the refresh process completes, unless an error has occurred.
   - Once the refresh process is complete, click the **Close** button to close the dialog.
7. The **Channels** table displays settings for each individual channel on the logger.

NOTE: Apart from the column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 10-6: Channels table columns (NICE Interaction Center)

Column	Description
	If the channel is not configured, an icon is displayed. If the channel is in an alarm state, an icon is displayed.
Channel	The individual channel number.
Channel type	The type of channel e.g. Analog or Digital.
Minimum period activity	The measured activity over the period defined by the 'Minimum period' setting. If the activity is less than the 'Minimum activity' setting, the channel is in an alarmed state.
Maximum period activity	The measured activity over the period defined by the 'Maximum period' setting. If the activity has exceeded the 'Maximum activity' setting, the channel is in an alarmed state.

Editing channel settings

- To edit the settings for a channel or a group of channels:

1. Select a channel (or multiple channels using Microsoft Windows standard Shift and Ctrl methods) from within the **Channels** table.
2. Do one of the following:
   – Click the **Edit** button.
   – Click the button on the **Settings** panel.

NOTE: You can change the settings for one channel by selecting the channel and double-clicking.

3. The **Settings** panel is presented and is divided into the following sections:

- General (see page 117)
- Activity Detection (see page 118)
- Activity Statistics (see page 119)
- Input Gain Control (see page 121)
- Session Creation Criteria (see page 121)
- Audio Alarms (see page 122)

Saving the changes to the selected channels

- To save the changes to the selected channels:

1. Once you have configured all the changes to the selected channels, click the **Save** button and the **Update Logger Channels** message is presented.
2. Double check that the correct channels are in the list and click the **Yes** button.
3. A Wizard Progress dialog is presented providing a summary of the channels that are being updated.
4. Do one of the following:
   – Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the update process completes, unless an error has occurred.
   – Once the update process is complete, click the **Close** button to close the dialog.

10.2.5.1 General

The following options are available:

NOTE: For your information, the channel number and channel type are displayed in the General section.

- **Configured** - when checked, all the channel settings in the Settings panel are enabled. Unchecking this box disables all the settings.

NOTE: When unchecking the Configured box, the affected channels are disabled and then re-enabled automatically. Recording on the affected channels stops.

- **Enabled for recording** - when checked, the selected channels are ready to record audio. Unchecking this box stops recording on the selected channels.
- **Compression type** - The compression type is the bit rate at which audio is recorded on the channel. Depending on your site configuration, select the compression type from the drop down list. The different compression types are:

Table 10-7: Audio compression types

Compression type	Compression ratio	Bit rate
ACA 5.6 kb/s	11.4:1 Compression	5.6 kb/s
ACA 6.4 kb/s	10:1 Compression	6.4 kb/s
ACA 7.2 kb/s	8.8:1 Compression	7.2 kb/s
ACA 8 kb/s	8:1 Compression	8 kb/s
G.729a 8 kb/s	8:1 Compression	8 kb/s
G.723.1 6.3 kb/s	10:1 Compression	6.3 kb/s
G.723.1 5.3 kb/s	12:1 Compression	5.3 kb/s
ADPCM 16 kb/s	4:1 Compression	16 kb/s
ADPCM 32 kb/s	2:1 Compression	32 kb/s
PCM 64 kb/s	No Compression	64 kb/s
PCM A-Law	No Compression	64 kb/s
PCM MU Law 64 kb/s	No Compression	64 kb/s

NOTE: When changing the **Compression type**, the affected channels are disabled and then re-enabled automatically. During this period, recording on the channels stop.

10.2.5.2 Activity Detection

Activity detection is how you define what type of audio is recorded on the channel. Activity detection is set separately for each channel so that you can choose to record different types of audio on different channels.

NOTE: When changing the **Activity Detection mode**, the affected channels are disabled and then re-enabled automatically. During this period, recording on the channels stop.

The following options are available:

- **Mode** - select one of the following Activity Detection modes from the drop down list. The different Activity Detection modes are:

Table 10-8: Activity detection modes

Activity Detection mode	Description
Energy	Based on average volume of the audio signal on the input channel. This type of detector is supported in all system

Activity Detection mode	Description
	configurations and is recommended for telephone inputs. The Energy detector, however, cannot differentiate between line noise and voice signals with the same level.
External	External trigger (such as a radio receiver's squelch output) is connected to the external activity detector input of the NiceLog Logger.
VOX	(Optional) Recognizes the characteristics of human voice, and rejects all other input audio so that only human voice is considered active.
On/Off Hook	(Optional) For telephone inputs. Detects when the telephone is in use (OFF hook) and not in use (ON hook). Audio on the input channel is recorded only when the connected telephone is in use.
Energy, External	Based on average volume of the audio signal on the input channel and is connected to the external activity detector input of the NiceLog Logger.
None	Disables Activity Detection for the selected audio input channels so that all audio input is recorded.

- **Threshold (%)** - the threshold determines which audio is considered active on the audio input channel and is based on the input volume of the audio relative to the threshold.

NOTE: You can **ONLY** set a threshold value if the Activity Detection mode is either set to **VOX** or **Energy**. Otherwise this feature is disabled.

The default threshold value is 39%. For a VOX Activity Detection mode, the recommended threshold value is 50%.

When changing the **Threshold** value, the affected channels are disabled and then re-enabled automatically. During this period, recording on the channels stops.

Follow these guidelines when setting the channel threshold level:

– A threshold level that is too low could cause silent audio segments to be recognized as active. In this case, disk space is wasted, and silence compression during playback does not function.

– A threshold level that is too high could cause active segments to be considered silent. Since silent segments are not recorded to the Logger's hard disk when activity detection is enabled, important audio data could be lost.

Once the correct threshold value has been decided, enter this value using the text box provided. Entry is assisted using the up/down arrows.

10.2.5.3 Activity Statistics

In the Activity Statistics section, you set minimum and maximum levels so that if the amount of activity reaches below or above these levels, an Activity Statistics alarm is triggered. These levels are computed by averaging the amount of activity over a period of time. They do not report a temporary change in activity level, as these changes occur naturally between recording sessions.

To enable the Activity Statistics section, check the **Enable alarms** box. Once enabled, the following options are available:

- **Minimum activity (%)** - The minimum activity rate (1% to 99%) allowed for the channel. The activity rate is the percentage of time that the channel is active. Normally, the minimum activity rate is 0.1%. This ensures that the Activity Statistics alarm for the channel cannot be activated unless no activity at all is detected during the minimum activity rate period. Enter the minimum activity value using the text box provided. Entry is assisted using the up/down arrows.
- **Minimum period (hours)** - The reference period (1 to 72 hours) for the minimum Activity rate check. If, during that period, the activity rate is below the minimum rate, the Activity Statistics alarm is activated. Normally, a longer period is appropriate (such as 72 hours). Enter the minimum period of hours using the text box provided. Entry is assisted using the up/down arrows.
- **Maximum activity (%)** - The maximum activity rate (1% to 99%) allowed for the channel. The activity rate is the percentage of time that the channel is active. Normally, the maximum activity rate is 99%. This ensures that the Activity Statistics alarm for the channel is only activated if active audio is detected 100% of the time during the maximum activity rate period. Enter the maximum activity value using the text box provided. Entry is assisted using the up/down arrows.
- **Maximum period (hours)** - The reference period (1 to 72 hours) for the maximum rate check. If, during the specified period, the activity rate on the selected audio input channel is above the maximum rate, the Activity Statistics alarm is activated (if enabled). Normally, a short period is appropriate (such as one hour). Enter the maximum period of hours using the text box provided. Entry is assisted using the up/down arrows.

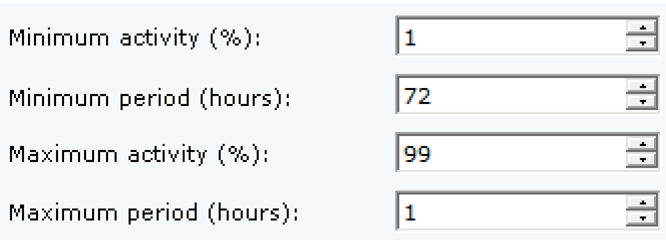
NOTE: You **MUST** ensure that the **Minimum activity (%)** * the **Minimum period (hours)** does **NOT** exceed the **Maximum activity (%)** * the **Maximum period (hours)**. If this rule is not followed, then you are presented with a dialog message informing you of this. You have to adjust the values accordingly.

Refer to the following examples to help illustrate this rule:

- **Example A**

  Example A shows a condition where the values are acceptable (1*72 = 72 and 99*1 = 99), as shown here.

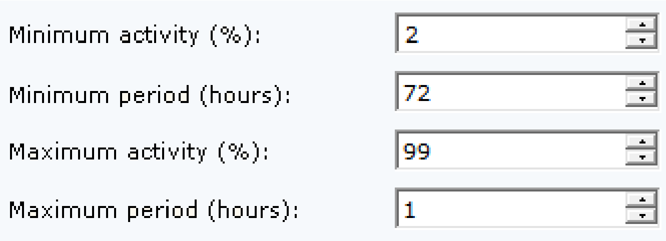
Figure 10-1: Activity stats example A



- **Example B**

  Example B shows a condition where the values are not acceptable (2*72 = 144 and 99*1 = 99), as shown here.

Figure 10-2: Activity stats example B



10.2.5.4 Input Gain Control

The Input Gain Control section allows you to specify an audio channel's input level (gain) either automatically or manually. Select one of the following:

- **Automatic** - enables AGC (Automatic Gain Control). This averages the volume level of the signal on the audio input channel so that high and low volume audio from the source are recorded automatically at the same volume level.
- **Manual (dB)** - once selected, enter the gain level between the values of zero and 30 dB (according to logger configuration) using the text box provided. Entry is assisted using the up/down arrows.

10.2.5.5 Session Creation Criteria

NOTE: When changing the **Session creation criteria**, the affected channels are disabled and then re-enabled automatically. During this period, recording on the channels stops.

Available options for session creation criteria are dependent on your logger configuration. Possible options for session creation criteria include:

- **API command** - opens a session on demand.
- **On/off hook detection** - creates sessions according to on/off hook activity. Audio segments are separated by the beginning and ending of conversations that are detected using on/off hook signal information.
- **DTMF** - Creates sessions according to DTMF parameters as defined on the logger Settings page (refer to Logger settings (see page 114)).

NOTE: This option is **ONLY** displayed if the logger supports DTMF Start and Stop codes.

- **Activity detection** - audio segments are defined by the level of activity on the telephone dependent on the activity detection mode on the channels.
- **Incoming call detection** - incoming call detected e.g. from a telephony switch.
- **External trigger** - session created by an external trigger (such as a radio receiver's squelch output).

NOTE: This option is **ONLY** displayed if the logger supports external triggers.

10.2.5.6 Audio Alarms

The following option is available:

- **Enable warning tones** - warning tones notify the caller that a telephone conversation is being recorded by sounding a beeping tone. Check the box to enable warning tones for the selected channels.

10.3 Logger backup

This section details the configuration of your NICE Interaction Management logger backups.

It covers the following areas:

10.3.1 Configuring logger backup

NOTE: Specific terminology is used when navigating the tree pane to configure logger backup. For help with this terminology, refer to Tree structure terminology (see page 4).

Any NICE Interaction Management logger device can be backed up using different configurations. All these available device options are detailed on the Backup page.

▸ To configure logger backup:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Interaction Management data source** node.
3. Expand the **NICE Interaction Center** node and select the required logger.
4. Click the **Backup** tab and the **Backup** page is presented.

The following features are available:

Devices table

The devices table lists all the devices (or drives) that are available for backup. Typically, these devices are either a tape or a DVD drive.

The following columns are displayed within the **Devices** table:

Table 10-9: Devices table columns (logger backup)

Column	Description
i	An icon is displayed if there is an error on the device. An Information icon is presented if the device is empty.
Device	The allocated number provided for the device. This is either **1** or **2** as **ONLY** two devices are supported.
Type	The type of device (typically tape or DVD).
Assignment	The mode of operation assigned to the device (manual, automatic or retrieval mode).
Status	The archiving status for the device.
Fill status	A progress bar providing a percentage of space used on the device.

Button bar

Select the required device from the **Devices** table and the following buttons are available to help you configure logger backup:

Table 10-10: Logger backup button bar

Button	Name
	Manual archiving (refer to Configuring manual archiving (see page 123))
	Configure automatic archiving (refer to Configuring automatic archiving (see page 124))
	Eject media (refer to Ejecting media (see page 126))
	View contents (future feature)
	Select archiving mode (refer to Selecting archive mode (see page 127))

10.3.2 Configuring manual archiving

- To manually configure which recordings are to be archived based on recording time and logger channels:

1. From within the **Backup** page, select the required device from the **Devices** table.

NOTE: For help navigating to the **Backup** page, refer to Configuring logger backup (see page 122).

2. Click the **Select archiving mode** button and select **Manual archiving** from the drop down list.

3. Within the button bar, click the **Manual archiving** button and the **Manual Archiving** dialog is presented.

4. At the **Archive from** section, select one of the following:

   – **Channel start** - archive starts from the earliest recording on the selected channels.

   – **At specified time -** recordings between the specified times are archived. Enter the archive date by using the text box provided. Date entry is assisted by clicking the **Calendar** button. A calendar control is provided to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*). Enter the archive time (if required) using the text box provided. Time entry is assisted by either selecting the hours, minutes or AM/PM and then using the up/down arrows.

5. At the **Archive to** section, select one of the following:
   - **Channel end** - archive ends at the last recording on the selected channels.
   - **At specific time -** recordings between the specified times are archived. Enter the archive date by using the text box provided. Date entry is assisted by clicking the **Calendar** button. A calendar control is provided to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*). Enter the archive time (if required) using the text box provided. Time entry is assisted by either selecting the hours, minutes or AM/PM and then using the up/down arrows.
6. Select the channels you wish to archive.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected channels from the list.

7. Click the **OK** button and after a few moments the manual archiving task starts. The device status changes to **Archiving** in the **Devices** table.

10.3.3 Configuring automatic archiving

To configure which recordings are to be automatically archived based on recording time and logger channels:

1. From within the **Backup** page, select the required device from the **Devices** table.

NOTE: For help navigating to the **Backup** page, refer to Configuring logger backup (see page 122).

2. Click the **Configuring archiving mode** button. The **Automatic Archiving Configuration Wizard** opens at the **Welcome** screen. Click the **Next** button to continue.
3. At the **Select Archiving Scheme** screen, select the device to configure e.g. tape or DVD drive by checking the associated **Device** box. If the logger has two available devices, you can select the second one using the same method.

NOTE: If you uncheck all available devices, automatic archiving **CANNOT** start once you complete the wizard. The device assignment changes to **Not used** in the **Devices** table to indicate this.

4. At the **Archiving scheme** section, select one of the following:
   - **Continuous -** all recordings on the logger are continuously archived to the media loaded into the device. When the media is full, it is ejected automatically. If the logger has two devices and you have selected both in the **Devices** section

archiving begins on the first media and once full, continues on the second media.

- **Channel based** - each device is configured to archive recordings on specific channels. You can select which channels are assigned to each device however, all channels **MUST** be assigned.
- **Mirrored** - two devices archive the same recordings from the logger at the same time. Once selected you **MUST** set a timeout value (in minutes) either by entering the minutes in the text box provided or by using the up/down arrows. The timeout value determines how long a device waits for the other device in the event of archiving failure. If the failed archiving device resumes within the timeout period, mirrored archiving continues. If the failed archiving device does not resume within the specified timeout period, the remaining device continues independently.

NOTE: The mirrored archiving scheme requires two devices. If your logger only has one device, this option is disabled.

5. Click the **Next** button to continue and the **Select Archiving Schedule** screen is presented.
6. At the **Start archiving** section, select one of the following:
   - **When the media is inserted** - archiving starts as soon as the media is inserted into the device.
   - **Periodically at** - set archiving to begin at a specific time on a specific day (or days) of the week. First, set the time using the text box provided. Time entry is assisted by either selecting the hours, minutes or AM/PM and then using the up/down arrows. Then, select the day or days of the week by checking the associated boxes.
7. At the **Finish archiving** section, select one of the following:
   - **When the media is full** - archiving finishes when the media inserted into the device is full.

NOTE: This feature is disabled if you have selected the **Periodically at** option in the **Start archiving** section.

   - Periodically at - set archiving to end at a specific time on a specific day (or days) of the week. First, set the time using the text box provided. Time entry is assisted by either selecting the hours, minutes or AM/PM and then using the up/down arrows. Then, select the day or days of the week by checking the associated boxes.

NOTE: If you have set archiving to begin at a specific time and on a specific day (or days), the **Finish archiving** mode automatically changes to 6 hours later. Therefore, the **Periodically at** option is disabled.

8. Click the **Next** button to continue and the **Select Media Overwrite Rules** screen is presented.

NOTE: The **Select Media Overwrite Rules** screen is only presented if one or more devices have been selected within the **Select Archiving Scheme** screen.

9. Chose when to overwrite media on each device or devices by selecting one of the following:
   - **Always overwrite** - recordings that have been archived are overwritten immediately when a different media is inserted into the device.

NOTE: If you eject a media and then insert it back into the device, the new contents are appended. If you insert a different media into the device, the media is overwritten.

   - **Only overwrite after** - specify the number of days or months before archived recordings can be overwritten. First, set the number for either days or months using the text box provided. Entry is assisted by using the up/down arrows. Then select either **Days** or **Months** from the drop down list.
10. Click the **Next** button to continue and the **Select Channels** screen is presented.

NOTE: The **Select Channels** screen is only presented if you have selected at least one device and set the **Archiving scheme** option to **Channel based** within the **Select Archiving Scheme** screen.

11. Select the channels you wish to archive.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected channels from the list.

12. Click the **Next** button to continue. If you have selected two devices from within the **Select Archiving Scheme** screen, the **Select Channels** screen is presented again for this second device. You must select the channels using the same method as for the first device.

NOTE: You can select which channels are assigned to each device however, all channels **MUST** be assigned.

13. Once the channels have been selected for the devices, and you have clicked the **Next** button, the **Summary** screen is presented.
14. Check that the details relating to the automatic archiving are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

10.3.4 Ejecting media

- To eject media (tape or DVD) from a device:

1. From within the **Backup** page, select the required device from the **Devices** table.

NOTE: For help navigating to the **Backup** page, refer to Configuring logger backup (see page 122).

2. Click the **Eject media** button.

3. The device status changes to **Ejecting** and once the media has been ejected the status changes to **Drive empty**.

NOTE: To use this device for archiving, you need to re-insert the media back into the drive.

10.3.5 Selecting archive mode

- To select the archiving mode for the device (tape or DVD drive) on the logger:

1. From within the **Backup** page, select the required device from the **Devices** table.

NOTE: For help navigating to the **Backup** page, refer to Configuring logger backup (see page 122).

2. Click the **Select archiving mode** button. The following options are available for selection from the resulting drop down list:

   – **Retrieval** - sets the selected device to be able to retrieve recordings from the appropriate media e.g. tape or DVD drive.

   – **Manual archiving** - sets the selected device to archive in manual mode. Select this option and click the **Manual archiving** button to configure manual archiving on the selected logger channels (refer to Configuring manual archiving (see page 123)).

NOTE: If you have two available devices for backup, you **CANNOT** set both to **Manual archiving** mode at the same time.

   – **Automatic archiving** - sets the selected device to archive in automatic mode. You first need to configure automatic archiving by running the **Automatic Archiving Configuration Wizard** followed by setting the **Automatic archiving** mode.

NOTE: If you have two available devices for backup, you **CANNOT** set one device in **Retrieval** mode and the other in **Automatic archiving** mode at the same time.

3. Once you have made your selection, a tick is placed alongside the active mode.

NOTE: Changing the mode results in the media being ejected from the device. You must re-insert the media back into the archiving before archiving can begin.

Changing to Manual mode

When changing from **Retrieval** or **Automatic archiving** mode to **Manual archiving** mode, you are presented with a message asking if you would like to overwrite the current media or append to the current media. Click **No** to append to the current media or click **Yes** to overwrite the current media.

10.4 NICE Perform Storage Center

NOTE: Specific terminology is used when navigating the tree pane to view details of the NICE Perform Storage Center. For help with this terminology, refer to Tree structure terminology (see page 4).

The configuration of NICE Perform Storage Center in this section applies only to NICE Perform 3.2 and 3.5 data sources and **NOT** NICE Interaction Management 4.1 data sources.

- To view the details of the NICE Perform Storage Center:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Perform data source** node.
3. Select the **NICE Perform Storage Center** node.
4. Select the **General** tab and the **General** page is presented.
5. The following read-only details are displayed:
   - **Label** - the label (name) of the NICE Perform Storage Center.
   - **Network address** - the hostname or IP address of the NICE Perform Storage Center.
   - **Capacity** - the total storage capacity in GB (Gigabytes) of the NICE Perform Storage Center.

An accompanying pie chart is displayed to provide you with a graphical representation of the free space and used space on the NICE Perform Storage Center. In addition, text is displayed alongside the pie chart providing you with a percentage or gigabyte value of the used and free space.

10.4.1 NICE Perform Storage Center rules

NOTE: Specific terminology is used when navigating the tree pane to view NICE Perform Storage Center rules. For help with this terminology, refer to Tree structure terminology (see page 4).

Storage rules define which recordings **MUST** be archived to the NICE Perform Storage Center, when archiving should take place and where the recordings must be archived (in a NICE Perform Storage Center group).

- To view the storage rules configured on the NICE Perform server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **NICE Perform data source** node.

3. Select the **NICE Perform Storage Center** node.

4. Select the **Storage Rules** tab and the **Storage Rules** page is presented.

5. The following columns are displayed within the **Storage Rules** table:

NOTE: Apart from the and **Status** columns, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 10-11: Storage Rules table columns

Column	Description
	An icon is displayed if the storage rule is inactive.
Rule name	The (name) provided for the storage rule.
Description	The description (if added) for the storage rule.
Schedule start	The date / time that the storage rule is scheduled to start.
Interval	The interval time between each archive task of the storage rule.
Storage groups	The NICE Perform Storage Center group (or groups) where recordings are archived to.
Status	The percentage completion of the current archive task.

Viewing storage rules schedule

A storage rules schedule is configured on the NICE Interaction Management server.

- To view the storage rules schedule:

1. Click the **Storage rule schedule** button. The **Storage Rule Schedule** dialog is presented.

2. The following read-only information is presented:

   – **Schedule Start time** - The date / time that the storage rule is scheduled to start.

   – **Schedule runs every** - The interval time between each archive task.

   – **Maximum task duration (minutes)** - The maximum amount of time (in minutes) that each archive task runs.

3. Once you have checked the storage rules schedule details, click the **OK** button to close the dialog.

10.4.2 Editing a NICE Perform Storage Center group

NOTE: Specific terminology is used when navigating the tree pane to edit the details of the NICE Perform Storage Center group. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit the details of a NICE Perform Storage Center group:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Perform data source** node.
3. Select the **NICE Perform Storage Center** node and select the required **NICE Perform Storage Center group** node.
4. Select the **General** tab and the **General** page is presented.
5. Edit one or more of the following:
   - **Label** - edit the label (name) of the NICE Perform Storage Center group in the text box provided.
   - **Number of storage units** - the number of storage units that have been configured for this NICE Perform Storage Center group.
   - **Capacity (GB)** - the maximum storage capacity (GB) available for all configured NICE Perform Storage Center units.

NOTE: The **Number of storage units** and **Capacity** fields are read-only and **CANNOT** be edited.

   - **Retention period (days)** - do one of the following:
     - Check the associated box and edit the number of days that files **MUST** remain in this NICE Perform Storage Center group in the text box provided. Entry is assisted by using the up/down arrows.
     - Uncheck the box if you do not want to set a retention value.
6. On completion, click the **Save** button.

An accompanying pie chart is displayed to provide you with a graphical representation of the free space and used space on the NICE Perform Storage Center group. In addition, text is displayed alongside the pie chart providing you with a percentage or gigabyte value of the used and free space.

10.4.3 Configuring NICE Perform Storage Center units

NOTE: Specific terminology is used when navigating the tree pane to configure the NICE Perform Storage Center units. For help with this terminology, refer to Tree structure terminology (see page 4).

A NICE Perform Storage Center unit is a configurable physical storage path that is located on the NICE Perform Storage Center group. Recordings are stored in this location. Multiple storage paths can be configured in order to increase storage capacity.

To configure NICE Perform Storage Center units:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Perform data source** node.
3. Select the **NICE Perform Storage Center** node and select the required **NICE Perform Storage Center group** node.
4. Select the **Storage Units** tab and the **Storage Units** page is presented.
5. The following columns are displayed within the **Storage Units** table:

NOTE: Apart from the i and **Fill status** columns, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 10-12: Storage Units table columns

Column	Description
i	An icon is presented if the maximum threshold for storage on the NICE Perform Storage Center unit has been reached.
Unit name	The name of the NICE Perform Storage Center unit.
Storage path	The file path (network share) where the recordings are stored. NOTE: Ensure that the Microsoft Windows user account used to run the NICE Inform Server service under also has access to the server used by the NICE Perform Storage Center
Type	The type of storage. Select one of the following: ▪ **Directory per day** - subdirectories are created under the defined storage path for each day of the year, ▪ **Multiple directories** - subdirectories are created under the defined storage path (based on destination type). Recordings are stored in a cyclic manner. When one subdirectory reaches full capacity, recordings are automatically stored to the next subdirectory.
Capacity	The storage capacity in GB (Gigabytes) on the NICE Perform Storage Center unit.
Fill status	The percentage of used storage space on the NICE Perform Storage Center unit. Hover the cursor over the bar to display a tooltip providing a percentage

Column	Description
	of space used, the capacity of the database device (GB) and the used space (GB).

Button bar

Select the required device from the **Storage Units** table and the following buttons are available to help you add, edit and delete NICE Perform Storage Center units:

Table 10-13: NICE Perform Storage Center units button bar

Button	Name
	Add storage unit (refer to Adding a NICE Perform Storage Center unit (see page 132))
	Edit storage unit (refer to Editing a NICE Perform Storage Center unit (see page 133))
	Delete storage unit (refer to Deleting a NICE Perform Storage Center unit (see page 134))

10.4.3.1 Adding a NICE Perform Storage Center unit

- To add a new NICE Perform Storage Center unit:

1. From within the **Storage Units** page, click the **Add storage unit** button and the **Add Storage Unit** dialog is presented.

NOTE: For help navigating to the **Storage Units** page, refer to Configuring NICE Perform Storage Center units (see page 131).

2. Enter the following details:

   - **Name** - enter a name for the storage unit in the text box provided.
   - **Storage path** - enter a valid path for the NICE Perform Storage Center unit in the text box provided.

NOTE: The storage path **MUST** be a valid network share e.g. *storage server**storage* directory.

   - **Storage type** - select one of the following:
     - **Directories per day** - subdirectories are created under the defined storage path for each day of the year.
     - **Multiple directories** - subdirectories are created under the defined storage path based on the destination type. Files are written to the subdirectories in a cyclic manner and therefore when one subdirectory reaches full capacity, files are written to the next subdirectory. Once selected, set the number of subdirectories on the storage unit in the text box provided. Entry is assisted by using the up/down arrows.

NOTE: The Number of subdirectories option is only available when the storage type has been set to **Multiple directories**.

- **Capacity (GB)** - the total capacity (GB) for storage on this storage unit. Enter the storage capacity in the text box provided. Entry is assisted by using the up/down arrows.
- **Maximum threshold %** - the maximum percentage threshold for storage on the storage unit. Enter the maximum threshold in the text box provided. Entry is assisted by using the up/down arrows.

NOTE: When total storage reaches the maximum percentage threshold, deletion of archived recordings occurs (unless the group retention period has not expired).

3. Click the **OK** button.
4. You are presented with a message informing you that you must restart the NICE Perform Storage Center to apply these changes. Click the **OK** button and restart the NICE Perform Storage Center.

The new NICE Perform Storage Center unit is displayed in the **Storage unit** table.

10.4.3.2 Editing a NICE Perform Storage Center unit

To edit a NICE Perform Storage Center unit:

1. From within the **Storage Units** page, select the required NICE Perform Storage Center unit from the **Storage Units** table.

NOTE: For help navigating to the Storage Units page, refer to Configuring NICE Perform Storage Center units (see page 131).

2. Click the **Edit storage unit** button and the **Edit Storage Unit** dialog is presented.
3. Edit one or more of the following:
   - **Name** - edit the name for the NICE Perform Storage Center unit in the text box provided.
   - **Capacity (GB)** - the total capacity (GB) for storage on this storage unit. Edit the storage capacity in the text box provided. Entry is assisted by using the up/down arrows.
   - **Maximum threshold %** - the maximum percentage threshold for storage on the storage unit. Edit the maximum threshold in the text box provided. Entry is assisted by using the up/down arrows.

NOTE: The Storage path and Storage type fields are read-only and **CANNOT** be edited.

4. Click the **OK** button.
5. You are presented with a message informing you that you must restart the NICE Perform Storage Center to apply these changes. Click the **OK** button and restart the NICE Perform Storage Center.

The edited NICE Perform Storage Center unit is displayed in the **Storage unit** table.

10.4.3.3 Deleting a NICE Perform Storage Center unit

- To delete a NICE Perform Storage Center unit:

1. From within the **Storage Units** page, select the required NICE Perform Storage Center unit for deletion from the **Storage Units** table.

NOTE: For help navigating to the Storage Units page, refer to Configuring NICE Perform Storage Center units (see page 131).

2. Click the **Delete storage unit** ✖ button. A confirmation message is presented confirming the deletion.
3. Click the **Yes** button.
4. You are then presented with a message informing you that you must restart the NICE Perform Storage Center to apply these changes. Click the **OK** button and restart the NICE Perform Storage Center.

The NICE Perform Storage Center unit is deleted from the **Storage unit** table.

11 NICE Inform hub data sources

This section covers all the available functions when configuring your NICE Inform Hub data sources:

11.1 Editing a NICE Inform hub data source

NOTE: Specific terminology is used when navigating the tree pane to edit a NICE Inform hub data source. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit a NICE Inform hub data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform hub data source** node.
3. Click the **General** tab and the **General** page is presented.
4. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - the name of the data source.
   - **Hub account** - the hub account name for the NICE Inform hub data source.
   - **Network address** - the hostname or IP address of the data source.

NOTE: If this set as a legacy data source, you **MUST** ensure the port number is set to 8086.

   - **Account password**:

   a. Click the **Set** button. The **Set Password** dialog is displayed.
   b. Change the hub account password for the NICE Inform hub data source in the **Password** text box, and then repeat in the **Confirm password** text box.
   c. Click the **OK** button. If there are no errors, the dialog closes.

5. On completion, click the **Save** button.

11.2 Deleting a NICE Inform hub data source

NOTE: Specific terminology is used when navigating the tree pane to delete a NICE Inform hub data source. For help with this terminology, refer to Tree structure terminology (see page 4).

All resources associated with this NICE Inform hub data source are also deleted and therefore **CANNOT** be searched against.

To delete a NICE Inform hub data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform hub data source** node for deletion.
3. In the button bar, click the **Delete data source** button. A confirmation message is presented confirming the deletion.
4. Click the **Yes** button.

The NICE Inform hub data source is removed from the tree pane.

11.3 Importing resources from a NICE Inform hub data source

NOTE: Specific terminology is used when navigating the tree pane to import resources from a NICE Inform hub data source. For help with this terminology, refer to Tree structure terminology (see page 4).

To import resources from a NICE Inform hub data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform hub data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Click the **Import** button.
6. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.
7. Do one of the following:

- Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
- Once the import process is complete, click the **Close** button to close the dialog.

8. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

NOTE: Resources imported are those that have been assigned to the hub account on the NICE Inform system represented by the NICE Inform hub data source (refer to Assigning resources to a hub account (see page 197)).

11.4 Editing and deleting a resource

NOTE: Specific terminology is used when navigating the tree pane to edit and delete a NICE Inform hub data source resource. For help with this terminology, refer to Tree structure terminology (see page 4).

Editing a NICE Inform hub data source resource

To edit a NICE Inform hub data source resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform hub data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Do one of the following:
   - Double-click the required resource.
   - Select the required resource and click the **Edit** button.

NOTE: In both cases, the **Edit Resource** dialog is presented.

Editing a resource can cover many different data source resource types and therefore the options on the **Edit Resource** dialog differ.

5. Edit the following options using the text boxes provided:
   - **Label** - a unique meaningful name that identifies the resource.
   - **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select a new resource to pair with.

   a. Select one of the following:
      - **Recording systems** - resources are listed by sites and data sources.
      - **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results in NICE Inform Reconstruction, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

– **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary source of the pairing. Otherwise, it becomes the secondary source and the other source in the pair becomes the primary.

NOTE: The remaining resource details **CANNOT** be edited as they are controlled on another NICE Inform system. For details as to what each option means, refer to the relevant data source section within the help.

6. On completion, click the **Save** button. Any changes made to the label for the resource is saved.

NOTE: Any users that require access to this resource have to log out and back in again to NICE Inform once the change to the resource has been made.

Deleting NICE Inform hub data source resources

- To delete resources:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **NICE Inform hub data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Select the required resources (by using Microsoft Windows standard Shift and Ctrl methods) and click the **Delete** button. A message is presented confirming the deletion.
5. Click the **Yes** button.

The resources are now deleted.

12 Media Vault data sources

This section covers all the available functions when configuring your Media Vault data sources:

12.1 Editing a Media Vault data source

NOTE: Specific terminology is used when navigating the tree pane to edit a Media Vault data source. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit a Media Vault data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Media Vault data source** node.
3. Click the **General** tab and the **General** page is presented.
4. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - the name of the data source.
   - **Network address** - the hostname or IP address of the data source.
   - **Port** - the port used to connect to the data source.
   - **Category** - defines how the Media Vault data source collects its results. For example, if it is a text category, the results are grouped into text conversations.
   - **Driver source** - defines which specific driver the Media Vault data source collects results for.
5. On completion, click the **Save** button.

12.2 Deleting a Media Vault data source

NOTE: Specific terminology is used when navigating the tree pane to delete a Media Vault data source. For help with this terminology, refer to Tree structure terminology (see page 4).

All resources associated with this Media Vault data source are also deleted and therefore **CANNOT** be searched against.

To delete a Media Vault data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Media Vault data source** node for deletion.
3. In the button bar, click the **Delete data source** button. A confirmation message is presented confirming the deletion.
4. Click the **Yes** button.

The Media Vault data source is removed from the tree pane.

12.3 Importing Media Vault resources from a data source

NOTE: Specific terminology is used when navigating the tree pane to import Media Vault resources from a data source. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To import Media Vault resources from a data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Media Vault data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Select one of the following:
   - **Keep the existing resources** - new resources are imported and any existing resources are kept.
   - **Overwrite the existing resources** - all existing resources are overwritten with the new resources.
6. Click the **Import** button.
7. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.
8. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
   - Once the import process is complete, click the **Close** button to close the dialog.
9. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

12.4 Editing a resource

NOTE: Specific terminology is used when navigating the tree pane to edit a generic resource. For help with this terminology, refer to Tree structure terminology (see page 4).

A generic resource is a basic resource that has limited customization e.g. a Media Vault resource.

- To edit a generic resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **data source** node (e.g. Media Vault data source).
3. Click the **Resources** tab and the **Resources** page is presented.
4. Do one of the following:
   - Double-click the required resource.
   - Select the required resource and click the **Edit** button.

NOTE: In both cases, the **Edit Resource** dialog is presented.

5. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - a unique meaningful name that identifies the resource.
   - **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select a new resource to pair with.

NOTE: The **Pair** and **Primary** options are **ONLY** available for text resources.

   a. Select one of the following:
      - **Recording systems** - resources are listed by sites and data sources.
      - **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

   b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results in NICE Inform Reconstruction, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

- **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary source of the pairing. Otherwise, it becomes the secondary source and the other source in the pair becomes the primary.

NOTE: The **Reference** text box is grayed out as editing this option is not supported.

6. On completion, click the **Save** button. Any changes made to the label for the resource is saved.

NOTE: Any users that require access to this resource have to log out and back in again to NICE Inform once the change to the resource has been made.

13 VPI Audio Logger data sources

This section covers all the available functions when configuring your VPI Audio Logger data sources:

13.1 Editing a VPI Audio Logger data source

NOTE: Specific terminology is used when navigating the tree pane to edit a VPI Audio Logger data source. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit a VPI Audio Logger data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **VPI Audio Logger data source** node.
3. Click the **General** tab and the **General** page is presented.
4. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - the name of the data source.
   - **Network address** - the hostname or IP address of the data source.
   - **SQL server authentication** - if you are using SQL server authentication for this data source, check the box and enter the following:
     - **SQL username** - the SQL username.
     - **SQL password** - the SQL password.
   - **SQL named instance** - check the box and the following option is enabled:
     - **Instance name** - the SQL instance name used to host the VPI Audio Logger database.
   - **Legacy system** - check the box if this VPI Audio Logger data source contains legacy resources. As a legacy system, the VPI Audio Logger remains in the same location but recording is disabled. Recording channels are no longer licensed by NICE Inform and you can only search and replay existing calls.

NOTE: If this data source has already been set as a legacy system, the box is checked and disabled. Once set as a legacy data source, you **CANNOT** change its legacy status.

- **Migrated system** - check the box if this VPI Audio Logger data source is in a migrated state. As a migrated system, the VPI Audio logger databases are removed and can be installed on a different server. As part of this process the databases are modified to include the path to the audio file for each call record and the audio remains in the same location. NICE Inform **ONLY** interacts with the database and reads the audio from the provided paths within the database and does not interact with the logger software as it is not present.
  - **Retention period (days)** - only enabled if you have checked the **Migrated system** box. Enter the number of days in the text box that after which call and recording files will be deleted.

5. On completion, click the **Save** button.

13.2 Deleting a VPI Audio Logger data source

NOTE: Specific terminology is used when navigating the tree pane to delete a VPI Audio Logger data source. For help with this terminology, refer to Tree structure terminology (see page 4).

All resources associated with this VPI Audio Logger data source are also deleted and therefore **CANNOT** be searched against.

To delete a VPI Audio Logger data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **VPI Audio Logger data source** node for deletion.
3. In the button bar, click the **Delete data source** button. A confirmation message is presented confirming the deletion.
4. Click the **Yes** button.

The VPI Audio Logger data source is removed from the tree pane.

13.3 Importing VPI Audio Logger resources from a data source

NOTE: Specific terminology is used when navigating the tree pane to import VPI Audio Logger resources from a data source. For help with this terminology, refer to Tree structure terminology (see page 4).

To import VPI Audio Logger resources from a data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **VPI Audio Logger data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Select the **Read the resource information from the data source** radio button.
6. Click the **Next** button and the **Specify Mappings** screen is presented.
7. The following options are available:
   - **Enable automatic import of resources** - check this box and the resources are automatically imported periodically.
   - **Resource type** - select the predominant resource type for the VPI Audio Logger from the drop down list.
8. Click the **Import** button to continue.
9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.
10. Do one of the following:
    - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
    - Once the import process is complete, click the **Close** button to close the dialog.
11. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

13.4 Importing resources from a CSV file

NOTE: Specific terminology is used when navigating the tree pane to import resources from a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Importing resources from a CSV file is the same procedure for all data sources that support this function.

To import resources from a CSV (Comma Separated Value) file:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.

3. Click the **Resources** tab. The **Resources** page is presented.

4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.

5. Select the **Read the resource information from a file** radio button.

6. When importing CAD resources **ONLY**, select one of the following options:

NOTE: For all other data source types other that CAD data sources, skip to step 7.

   – **Keep the existing resources -** existing resources are kept during the import process.
   – **Overwrite the existing resources** - resources are overwritten during the import process.

7. Click the **Next** button and at the **Select File** screen, do one of the following:

   – Click the **Browse** button and browse to the folder location where the CSV file is stored. Once the CSV file has been located, click the **Open** button.
   – Enter the folder location for the CSV file in the text box provided.

8. Click the **Import** button.

9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.

10. Do one of the following:

   – Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
   – Once the import process is complete, click the **Close** button to close the dialog.

11. At the **Wizard Complete** screen click the **Finish** button to exit the wizard.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

13.5 Exporting resources as a CSV file

NOTE: Specific terminology is used when navigating the tree pane to export resources as a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Exporting resources as a CSV file is the same procedure for all data sources that support this function.

▸ To export a resources file in CSV (Comma Separated Value) file format:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Export** button and the **Export Resources** dialog is presented.
5. Click the **Browse** button and browse to the location to export the resources.
6. Enter the required **File name** ensuring that the **File type** is set to **CSV** and click the **Save** button.
7. On completion, click the **OK** button.
8. A progress dialog is presented providing a summary of the resources that are being exported.
9. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the export process completes, unless an error has occurred.
   - Once the export process is complete, click the **Close** button to close the dialog.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

13.6 Adding a VPI Audio Logger resource manually

NOTE: Specific terminology is used when navigating the tree pane to add a VPI Audio Logger resource manually. For help with this terminology, refer to Tree structure terminology (see page 4).

To add a VPI Audio Logger resource manually:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **VPI Audio Logger data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Click the **Add** button. The **Add Resource** dialog is presented.
5. Enter the following details and where applicable use the text boxes provided:
   - **Resource type** - click the down arrow and select the required resource type so that the NICE inform applications can group resource by type (Telephony, Radio, Generic Audio or Maintenance).
   - **Reference** - click the down arrow and select the required reference type for the underlying resource (Channel, Agent, Extension, Talk Group or Radio). Click the

Browse ... button to display the **Enter Resource Reference** dialog. This dialog is only available if the VPI Audio Logger resource is set to **Channel**. It shows the logger ID for all loggers associated with the VPI Audio Logger data source. The fields are editable so you can change the Logger ID and Channel number details.

- **Label** - a unique meaningful name that identifies the resource.
- **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select the resource to pair with.

a. Select one of the following:

   - **Recording systems** - resources are listed by sites and data sources.
   - **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

- **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary resource of the pairing. Otherwise, it becomes the secondary resource and the other resource in the pair becomes the primary.

6. On completion, click the **Add** button to add the resource.

NOTE: The **Add Resource** dialog remains open to enable you to add further resources if required. Once finished, click the **Close** button to close the dialog.

13.7 Editing and deleting a VPI Audio Logger resource

NOTE: Specific terminology is used when navigating the tree pane to edit and delete a VPI Audio Logger resource. For help with this terminology, refer to Tree structure terminology (see page 4).

Editing a VPI Audio Logger resource

- To edit a VPI Audio Logger resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Data Sources** node and then select the required **VPI Audio Logger data source** node.

3. Click the **Resources** tab and the **Resources** page is presented.

4. Do one of the following:

   – Double-click the required resource.

   – Select the required resource and click the **Edit** button.

NOTE: In both cases, the **Edit Resource** dialog is presented.

5. Edit one or more of the following and where applicable use the text boxes provided:

   – **Resource type** - click the down arrow and select the required resource type so that the NICE inform applications can group resource by type (Telephony, Radio, Generic Audio or Maintenance).

   – **Reference** - click the down arrow and select the required reference type for the underlying resource (Channel Agent, Extension, Talk Group or Radio). Click the **Browse** ... button to display the **Enter Resource Reference** dialog. This dialog is only available if the VPI Audio Logger resource is set to Channel. It shows the logger ID for all loggers associated with the VPI Audio Logger data source. The fields are editable so you can change the Logger ID and Channel number details.

   – **Label** - a unique meaningful name that identifies the resource.

   – **Pair** - used for parallel recording in resilient systems. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select the resource to pair with.

   a. **Select one of the following:**

      ➢ **Recording systems** - resources are listed by sites and data sources.

      ➢ **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

   b. Select the resource to pair with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

The resource that is being paired with has to exist before the new resource can be added.

You **CANNOT** pair a new resource with one that has already been paired to a different resource, if does not yet exist or if it is a different resource type. For help viewing paired results, refer to *Viewing paired results* in *NICE Inform Reconstruction*.

   – **Primary** - this check box becomes enabled when data is entered into the **Pair** field. If the check box is selected, the resource being added becomes the primary resource of the pairing. Otherwise, it becomes the secondary resource and the other resource in the pair becomes the primary.

6. On completion, click the **Save** button. Any changes made to the VPI Audio Logger resource are now saved.

NOTE: Any users that require access to this resource have to log out and back in again to NICE Inform once the change to the resource has been made.

Deleting VPI Audio Logger resources

To delete VPI Audio Logger resources:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **VPI Audio Logger data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Select the required resource or resources (by using Microsoft Windows standard Shift and Ctrl methods) and click the **Delete** button. A message is presented confirming the deletion.
5. Click the **Yes** button.

The resources are now deleted.

NOTE: Before deleting and removing resources, ensure that any required voice recordings held on the resources have been saved as incidents or WAV files. You **CANNOT** access the recordings once the resources have been removed.

14 CAD data sources

This section covers all the available functions when configuring your CAD data source:

- Editing a CAD data source (see page 151)
- Deleting a CAD data source (see page 153)
- Importing CAD resources from a data source (see page 153)
- Editing and deleting a CAD resource (see page 155)
- Configuring CAD agency partitioning (see page 156)

NOTE: You can add up to 9 CAD data sources to NICE Inform at any one time.

14.1 Editing a CAD data source

NOTE: Specific terminology is used when navigating the tree pane to edit a CAD data source data source. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit a CAD data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the **CAD data source** node.
3. Click the **General** tab and the **General** page is presented.
4. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - the name of the data source.
   - **Network address** - the hostname or IP address of the data source.

NOTE: The **Network address** option is **NOT** supported for eFORCE CAD systems

   - **Database name** - the name of the CAD database.

NOTE: The **Database name** option is **ONLY** supported for Hexagon Intergraph CAD, TriTech TotalCommand CAD, TriTech Inform CAD and Versaterm CAD systems.

   - **User account name** - the user account name for the data source.
   - **User account password** - the user account password for the data source.

NOTE: The **User account name** and **User account password** options are **ONLY** supported for Spillman CAD systems.

- **Base API URI** - the Uniform Resource Identifier (typically a URL) for the data source.

NOTE: The **Base API URI** option is **ONLY** supported for eFORCE CAD systems.

- **SQL server authentication** - if you are using SQL server authentication for this data source, check the box and enter the following:
  - **SQL username** - the SQL username.
  - **SQL password** - the SQL password.

NOTE: The **SQL server authentication** options are **NOT** supported for Spillman CAD and eFORCE CAD systems.

- **Bearer token** - access token needed to connect to the data source.
- **CAD User** - user ID needed to connect to the data source.

NOTE: The **Bearer token** and **CAD User** options are **ONLY** supported for eFORCE CAD systems.

- **Time zone** - click the drop down arrow and select the time zone where the CAD server is located. Failure to select the correct time zone will result in incorrect times for your CAD search results in NICE Inform Reconstruction.

NOTE: The **Time zone** option is **NOT** supported for Hexagon Intergraph CAD systems.

- **Telephony search time before event, seconds** - applicable for telephony calls only, enter the number of seconds that you require to search before all found CAD events in the text box provided.
- **Telephony search time after event, seconds** - applicable for telephony calls only, enter the number of seconds that you require to search after all found CAD events in the text box provided.
- **Maximum ongoing incident duration** - sets the assumed duration (in hours) for incidents where the end time is unknown.
- **CAD version** - the version of the CAD system. To change, click the down arrow and select the required CAD version.

NOTE: The **CAD version** option is **ONLY** supported for Hexagon Intergraph CAD systems.

5. On completion, click the **Save** button.

14.2 Deleting a CAD data source

NOTE: Specific terminology is used when navigating the tree pane to delete a CAD data source. For help with this terminology, refer to Tree structure terminology (see page 4).

All resources associated with this CAD data source are also deleted and therefore **CANNOT** be searched against.

To delete a CAD data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **CAD data source** node for deletion.
3. In the button bar, click the **Delete data source** button. A confirmation message is presented confirming the deletion.
4. Click the **Yes** button.

The CAD data source is removed from the tree pane.

14.3 Importing CAD resources from a data source

NOTE: Specific terminology is used when navigating the tree pane to import CAD resources from a data source. For help with this terminology, refer to Tree structure terminology (see page 4).

To import CAD resources from a data source:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **CAD data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Click the **Next** button and at the **Specify Resources Prefix** page do the following:
   a. Check the **Add resource name prefix** box if you require to enter a prefix for all the CAD resources.
   b. Using the **Resource prefix** text box, enter a prefix for all the CAD resources.
   c. Click the **Import** button.
6. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.

7. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
   - Once the import process is complete, click the **Close** button to close the dialog.
8. At the **Wizard Complete** screen, click the **Finish** button to exit the wizard.

14.4 Importing resources from a CSV file

NOTE: Specific terminology is used when navigating the tree pane to import resources from a CSV file. For help with this terminology, refer to Tree structure terminology (see page 4).

Importing resources from a CSV file is the same procedure for all data sources that support this function.

▶ To import resources from a CSV (Comma Separated Value) file:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **Data source** node.
3. Click the **Resources** tab. The **Resources** page is presented.
4. Click the **Import** button and the **Import Resources Wizard** starts at the **Welcome** screen.
5. Select the **Read the resource information from a file** radio button.
6. When importing CAD resources **ONLY**, select one of the following options:

NOTE: For all other data source types other that CAD data sources, skip to step 7.

   - **Keep the existing resources -** existing resources are kept during the import process.
   - **Overwrite the existing resources** - resources are overwritten during the import process.
7. Click the **Next** button and at the **Select File** screen, do one of the following:
   - Click the **Browse** button and browse to the folder location where the CSV file is stored. Once the CSV file has been located, click the **Open** button.
   - Enter the folder location for the CSV file in the text box provided.
8. Click the **Import** button.
9. A Wizard Progress dialog is presented providing a summary of the resources that are being imported.

10. Do one of the following:
    - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
    - Once the import process is complete, click the **Close** button to close the dialog.
11. At the **Wizard Complete** screen click the **Finish** button to exit the wizard.

For help regarding the information displayed in the CSV file, refer to CSV resources file details (see page 89).

14.5 Editing and deleting a CAD resource

NOTE: Specific terminology is used when navigating the tree pane to edit and delete a CAD resource. For help with this terminology, refer to Tree structure terminology (see page 4).

Editing a CAD resource

To edit a CAD resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **CAD data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Do one of the following:
    - Double-click the required resource.
    - Select the required resource and click the **Edit** button.

NOTE: In both cases, the **Edit Resource** dialog is presented.

5. Edit one or more of the following and where applicable use the text boxes provided:
    - **Label** - a unique meaningful name that identifies the resource.
    - **Reference** - the reference derived from the CAD system. This field is read-only.
    - **Linked resources** - enables you to link a resource to the CAD resource so that when you perform a CAD search in NICE Inform Reconstruction, the corresponding recording is automatically searched for and displayed alongside the CAD incident. Click the **Browse** ... button to display **Resource Selection** screen. Here you can select the resource to link with.

    a. **Select one of the following:**
        - **Recording systems** - resources are listed by sites and data sources.

- **Resource group** - resources are listed in the groups set up under System Administration (refer to Creating a resource group (see page 164)).

b. Select the resource to link with.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove the selected resource from the list.

6. On completion, click the **Save** button. Any changes made to the CAD resource are now saved.

NOTE: Any users that require access to this resource have to log out and back in again to NICE Inform once the change to the resource has been made.

Deleting CAD resources

- To delete CAD resources:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the required **CAD data source** node.
3. Click the **Resources** tab and the **Resources** page is presented.
4. Select the required resource or resources (by using Microsoft Windows standard Shift and Ctrl methods) and click the **Delete** button. A message is presented confirming the deletion.
5. Click the **Yes** button.

The resources are now deleted.

14.6 Configuring CAD agency partitioning

NOTE: Specific terminology is used when navigating the tree pane configure CAD agency partitioning. For help with this terminology, refer to Tree structure terminology (see page 4).

The configuring CAD agency partitioning feature is **ONLY** available if you are licensed for NICE Inform Intelligence Center.

Use this section enables configure CAD agency partitioning for NICE Intelligence Center reporting. Once configured, agencies can be assigned to a CAD resource that is attached to a user group. This then restrict the CAD incidents viewable by the user in NICE Intelligence Center to only those incidents that belong to one of the assigned agencies. To assign an agency to a CAD resource within a user group, refer to *Assigning agencies to a CAD resource* within *NICE Inform User Administration*.

- To configure CAD agency partitioning:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the **CAD data source** node.
3. Click the **Agencies for IC Partitioning** tab and the **Agencies for IC Partitioning** page is presented.

An **Agency** table is displayed for your configured agency partitions displaying each agency name and associated agency partitions.

The following CAD agency partitioning features are provided:

- Adding an agency (see page 157)
- Editing an agency (see page 158)
- Deleting an agency (see page 159)

14.6.1 Adding an agency

NOTE: Specific terminology is used when navigating the tree pane to add an agency. For help with this terminology, refer to Tree structure terminology (see page 4).

The configuring CAD agency partitioning feature is **ONLY** available if you are licensed for NICE Inform Intelligence Center.

To add an agency:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the **CAD data source** node.
3. Click the **Agencies for IC Partitioning** tab and the **Agencies for IC Partitioning** page is presented.
4. Click the **Add** button and the **Add Agency** dialog is presented.
5. Enter the following information for the agency using the text boxes provided:
   - **Agency Name** - a unique name for the agency.
   - **Agency Identifier** 1, 2 and 3 - the identifier for the agency (e.g. *Fire*) which is the value from the CAD system for the agency. The aggregation of the agency identifiers is the grouping of the fields to form a single value so that *Agency Identifier 1 = Law*, *Agency Identifier 2 = 123* is different to *Agency Identifier 1 = Fire*, *Agency Identifier 2 = 123*.

NOTE: You **MUST** at least provide an agency name and an agency identifier 1 in order to save the new agency.

If the agency name, or the aggregation of the agency identifiers already exist then an error message is displayed, and the agency is not added. The agency name and the aggregation of the agency identifiers **MUST** be unique before you can save this agency.

6. Click the **Add** button.

The agency is now added and is displayed within the **Agency** table.

14.6.2 Editing an agency

NOTE: Specific terminology is used when navigating the tree pane to edit an agency. For help with this terminology, refer to Tree structure terminology (see page 4).

The configuring CAD agency partitioning feature is **ONLY** available if you are licensed for NICE Inform Intelligence Center.

To edit an agency:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the **CAD data source** node.
3. Click the **Agencies for IC Partitioning** tab and the **Agencies for IC Partitioning** page is presented.
4. Select the required agency from within the **Agency** table
5. Click the **Edit** button and the **Edit Agency** dialog is presented.
6. Edit one or more of the following information for the agency using the text boxes provided:
   - **Agency Name** - a unique name for the agency.
   - **Agency Identifier** 1, 2 and 3 - the identifier for the agency (e.g. *Fire*) which is the value from the CAD system for the agency. The aggregation of the agency identifiers is the grouping of the fields to form a single value so that *Agency Identifier 1 = Law*, *Agency Identifier 2 = 123* is different to *Agency Identifier 1 = Fire*, *Agency Identifier 2 = 123*.

NOTE: You **MUST** at least provide an agency name and an agency identifier 1 in order to save changes for the agency.

If the agency name, or the aggregation of the agency identifiers already exist then an error message is displayed, and the agency is not updated. The agency name and the aggregation of the agency identifiers **MUST** be unique before you can save the change to the agency.

7. Click the **Save** button.

The agency is now updated within the **Agency** table.

14.6.3 Deleting an agency

NOTE: Specific terminology is used when navigating the tree pane to delete an agency. For help with this terminology, refer to Tree structure terminology (see page 4).

The configuring CAD agency partitioning feature is **ONLY** available if you are licensed for NICE Inform Intelligence Center.

To delete an agency:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Data Sources** node and then select the **CAD data source** node.
3. Click the **Agencies for IC Partitioning** tab and the **Agencies for IC Partitioning** page is presented.
4. Select an agency or a group of agencies from within the **Agency** table (using Microsoft Windows standard Shift and Ctrl methods).
5. Click the **Delete** button. A message is presented confirming the deletion.
6. Click the **Yes** button followed by the **Save** button.

The selected agencies are now removed from the **Agency** table and are no longer available for user group assignment and therefore access to view CAD incidents that belong to these agencies in NICE Inform Intelligence Center will be removed.

15 Replay devices

NOTE: Specific terminology is used when navigating the tree pane to configure replay devices. For help with this terminology, refer to Tree structure terminology (see page 4).

Replaying certain recordings (e.g. and Motorola Dimetra radio calls) are not performed directly within NICE Inform. For you to replay these types of recordings, you **MUST** use a replay device.

The replay device is a workstation that is connected to NICE Inform.

- To configure replay devices:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Replay Devices** node and then select the required replay device type (e.g. CryptR).

NOTE: For help configuring a CryptR replay device, refer to CryptR replay devices (see page 160).

15.1 CryptR replay devices

NOTE: Specific terminology is used when navigating the tree pane to configure CryptR replay devices. For help with this terminology, refer to Tree structure terminology (see page 4).

Replaying Motorola encrypted Dimetra radio calls is not performed directly within NICE Inform.

First, you **MUST** add a replay device called a CryptR. Encrypted recordings are then forwarded to the CryptR whereby they are decrypted and replayed using the Audio Module through speakers or a headset (or both).

The CryptR replay device is connected to individual NICE Inform workstations. Follow this section for help configuring your CryptR replay devices.

NOTE: Once you have configured your CryptR replay device, you **MUST** assign it to a workstation (refer to Assigning a replay device to a workstation (see page 236)).

- To configure CryptR replay devices:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Replay Devices** node and select the **CryptR** node. The **General** page is presented.

The following functions are available:

- Adding a CryptR replay device (see page 161)
- Editing a CryptR replay device (see page 162)
- Deleting a CryptR replay device (see page 163)

Saving statistics

Statistical information relating to the CryptR can be saved to the Audio Module.

▶ To save CryptR statistical information to the Audio Module:

1. Select the required CryptR from the **CryptR** table.
2. Click the **Save statistics** button.
3. A message is presented informing you that the request was sent successfully. Click the **OK** button.

Saving diagnostics

Diagnostic information relating to the CryptR can be sent to the connected NICE Inform workstation.

▶ To save CryptR diagnostic information to the connected NICE Inform workstation:

1. Select the required CryptR from the **CryptR** table.
2. Click the **Save diagnostics** button.
3. Click the **Browse** button and browse to the location to save the diagnostics.
4. Click the **Save** button.

15.1.1 Adding a CryptR replay device

NOTE:	Specific terminology is used when navigating the tree pane to add a CryptR replay device. For help with this terminology, refer to Tree structure terminology (see page 4).

▶ To add a CryptR replay device:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Replay Devices** node and select the **CryptR** node. The **General** page is presented.
3. Click the **Add** button and the **Add CryptR Replay Device** dialog is presented.
4. Enter the following details in the text boxes provided:
   - **Label** - type a meaningful name for the CryptR replay device.
   - **CryptR network address** - enter the address for the CryptR replay device.

   - **CryptR network port** - either leave the default port or enter the correct port for the CryptR replay device.

5. At the **Audio Module speaker configuration** section, select one of the following:
   - **One speaker** - recordings are replayed through one speaker on the Audio Module.
   - **Two speakers** - recordings are replayed through two speakers on the Audio Module.
6. On completion, click the **OK** button to add the new replay device. The new replay device is now added into the **CryptR** table.
7. Click the **Save** button.

15.1.2 Editing a CryptR replay device

NOTE: Specific terminology is used when navigating the tree pane to edit a CryptR replay device. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit a CryptR replay device:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Replay Devices** node and select the **CryptR** node. The **General** page is presented.
3. Within the **CryptR** table, select one of the following:
   - Double-click the required replay device.
   - Select the required replay device and click the **Edit** button.

NOTE: In both cases, the **Edit CryptR Replay Device** dialog is presented.

4. Edit the existing entries as required in the text boxes provided:
   - **Label** - the name for the CryptR replay device.
   - **CryptR network address** - the address for the CryptR replay device.
   - **CryptR network port** - the port for the CryptR replay device.
5. At the **Audio Module speaker configuration** section, select one of the following:
   - **One speaker** - recordings are replayed through one speaker on the Audio Module.
   - **Two speakers** - recordings are replayed through two speakers on the Audio Module.
6. On completion, click the **OK** button followed by the **Save** button.

15.1.3 Deleting a CryptR replay device

NOTE: Specific terminology is used when navigating the tree pane to delete a CryptR replay device. For help with this terminology, refer to Tree structure terminology (see page 4).

- To delete a CryptR replay device:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Replay Devices** node and select the **CryptR** node. The **General** page is presented.
3. Select the required replay device from the **CryptR** table.
4. Click the **Delete** button followed by the **Save** button.

The CryptR replay device is now deleted.

16 Resource groups

This section details the configuration of your resource groups.

It covers the following main areas:

- Creating a resource group (see page 164)
- Editing a resource group (see page 165)
- Moving a resource group (see page 166)
- Deleting a resource group (see page 166)

16.1 Creating a resource group

NOTE: Specific terminology is used when navigating the tree pane to create a resource group. For help with this terminology, refer to Tree structure terminology (see page 4).

To create a resource group:

1. Do one of the following:

   – Select the **Resource Groups** node in the tree (if the new group is to be a child of this node).

   – Expand the **Resource Groups** node in the tree and select the required group (if this new group is to be the child of this node).

2. Click the **Add** button and select the **Add Resource Group** option from the drop down menu.

3. The **New Resource Group Wizard** opens at the **Welcome** screen. Click the **Next** button to continue.

4. At the **Group Name and Description** screen:

   a. Enter the name of the **Group** (mandatory).
   b. Enter a **Description** (optional).
   c. On completion, click the **Next** button.

5. At the **Add Resources** screen is presented, select the resources to be added to the resource group:

   a. Select either **Recording systems** or **Resource groups** from within the **Groups** tree.
   b. Select the resources to be added

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

   c. On completion, click the **Next** button.

6. At the **Summary** screen, check that the details for the resource group are correct. Once satisfied, click the Finish button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

7. Click the **Finish** button to add the resource group.

16.2 Editing a resource group

NOTE: The Maintenance Resources group **CANNOT** be edited and is **ONLY** displayed if Maintenance mode is enabled. To enable this mode, refer to Editing site details (see page 10).

Specific terminology is used when navigating the tree pane to edit a resource group. For help with this terminology, refer to Tree structure terminology (see page 4).

- To edit an existing resource group:

1. In the tree pane, expand the **Resource Group** node and select the required **Resource Group** node.

2. In the right hand pane, two tabbed pages are available for editing (the **General** page (default) and the **Members** page).

3. The following tabbed pages are available:

   – General page (see page 165)

   – Members page (see page 165)

16.2.1 General page

- To edit the resource group details:

1. Edit the existing **Group** name (if required) in the text box provided

2. Edit the existing **Description** (if required) in the text box provided.

3. On completion, click the **Save** button.

16.2.2 Members page

At the Members page, you can add further resources to the group.

- To add resources (members) to the resources group:

1. Click the **Add** button and the **Add Resource Group Members** dialog is presented.

2. Select the members to be added to the **Group** (optional):

   a. Select the required group, either **Recording Systems** or **Resource Groups**.
   b. Select the required resources.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list:

c. On completion, click the **OK** button.

Removing resources

- To remove resources from the resource group:

1. Select the required resource or resources (using Microsoft Windows standard Shift and Ctrl methods) within the **Members** table.
2. Click the **Remove** button. A message is presented confirming the removal.
3. Click the **Yes** button.

The resources are now removed from the resource group.

16.3 Moving a resource group

NOTE: Specific terminology is used when navigating the tree pane to move a resource group. For help with this terminology, refer to Tree structure terminology (see page 4).

- To move a resource group and all of its sub-groups:

1. In the tree pane, expand the **Resource Group** node and select the required **Resource Group** node to be moved.
2. Click the **Move Resource Group** button.
3. A **Move Group** dialog is presented displaying the tree structure of the resource groups that you have the privilege to view.

NOTE: The **Maintenance Resources** group **CANNOT** be moved and is **ONLY** displayed if **Maintenance mode** is enabled. To enable this mode, refer to Editing site details (see page 10).

4. Select a group as the new location for the resource group you wish to move, and click the **OK** button.

The group and any of its sub-groups are all moved to the new location.

16.4 Deleting a resource group

NOTE: Specific terminology is used when navigating the tree pane to delete a resource group. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a resource group:

1. In the tree pane, expand the **Resource Group** node and select the required **Resource Group** node for deletion.
2. Click the **Delete Resource Group** button. A message is presented confirming the deletion.
3. Click the **Yes** button.

The resource group is now deleted.

17 Inform servers

This section details the configuration of your NICE Inform servers.

It covers the following main areas:

17.1 Inform server details

NOTE: Specific terminology is used when navigating the tree pane to view NICE Inform server details. For help with this terminology, refer to Tree structure terminology (see page 4).

To view the details of the NICE Inform server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Inform Servers** node.
3. Click the **Servers** tab and the **Servers** page is presented.

The following NICE Inform server details are displayed within the table on Servers page:

NOTE: Apart from the column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 17-1: Inform Servers table columns

Column	Description
i	An icon is displayed if there is an error connecting to the NICE Inform server.
Label	The label (name) for the NICE Inform server.
Network address	The hostname or IP address of the NICE Inform server.
Description	A description relating to the NICE Inform server.
Server type	The NICE Inform server type (Standalone, Master or Standby).

17.2 Editing Inform server details

NOTE: Specific terminology is used when navigating the tree pane to edit NICE Inform server details. For help with this terminology, refer to Tree structure terminology (see page 4).

- To edit the details of the NICE Inform server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Inform Servers** node and select the required **Inform server** node.
3. Click the **General** tab and the **General** page is presented displaying the NICE Inform server details.
4. Edit the existing entries as required:
   - **Label** - the label (name) for the NICE Inform server.
   - **Network address** - the hostname or IP address of the NICE Inform server.

NOTE: If the NICE Inform server is using IPV6, you **MUST** enter the hostname and **NOT** the IP address.

   - **Description** - a description relating to the NICE Inform server.
5. Edit one or more of these fields in the associated text boxes if required.

NOTE: An entry is required in each field otherwise it is not possible to make changes to the NICE Inform server details.

6. On completion, click the **Save** button to commit the changes.

The following sections are also available:

- Server Resilience (see page 169)
- System Diagnostics (see page 170)

17.2.1 Server Resilience

NOTE: In order to use the Server Resilience section you **MUST** be licensed for Server Resilience (refer to Importing licensing details (see page 188)).

- To configure server resilience:

1. Within the **Server Resilience** section set the **Type** to one of the following:
   - **Standalone** - set this Inform server to be standalone and hence removing Inform server resilience. Any standby servers are removed from the Inform server configuration.

– **Master** - set this Inform server to be the master. Once you save the Inform server as a master, the **Inform Server** icon within the tree pane changes to reflect that it is now the master.

NOTE: The **Type** option is disabled if there is an issue preventing the configuration of server resilience. If so, an information icon is displayed. Hover the cursor over the icon and a tooltip is displayed providing you with information as to the reason why it is disabled.

The **Folder path** field is read-only path for the location of the log shipping files on the server. This path can **ONLY** be changed in the Server Configuration Wizard.

In order to add a standby Inform server (refer to Adding a standby Inform server (see page 175)) you have to make this NICE Inform server a master.

2. On completion, click the **Save** button to commit the changes.

NOTE: If you have changed the Inform server type, a message is presented informing that all users will be automatically logged out from the NICE Inform server that is being updated. All users will be unable to log back in until the server has automatically been reconfigured and restarted. Click the **Yes** button to continue.

Inform server resilience status

The Status Details table displays information relating to the NICE Inform server and databases. The table displays the following information:

Table 17-2: Status Details table columns (Inform server resilience)

Column	Description
ℹ	If the server is either uncontactable or has been misconfigured then an icon is displayed informing you that there is a problem. If a server is contactable and there is an error backing up one or more NICE Inform databases, the icon displayed for each database that has an error.
Database	The name of the NICE Inform database.
Last Backup	The date and time that the last backup was made.
Status	Any errors occurred when backing up the database are displayed here. If there are no errors the status column is empty. NOTE: It can take a short while before the status information is retrieved from all the standby Inform servers.

17.2.2 System Diagnostics

This section provides the function of being able to run a SNMP system diagnostic test.

NOTE: This feature is designed **ONLY** for NICE Inform Installation engineers.

▸ To perform a SNMP system diagnostic test:

1. Click the drop down arrow and select **Send test SNMP** trap.

2. Click the **Run** button and a confirmation message is presented.

3. Click the **Yes** button followed by the **OK** button to the second message.

The test SNMP trap is sent.

17.3 Inform server settings

NOTE: Specific terminology is used when navigating the tree pane to change NICE Inform server settings. For help with this terminology, refer to Tree structure terminology (see page 4).

To change the settings for the Inform server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Select the **Inform Servers** node.

3. Click the **Settings** tab and the **Settings** page is presented.

The following sections are available:

- Time Monitor (see page 171)
- Check Paired Resources (see page 173)
- Tamper Detection (see page 173)
- EMC Centera (see page 173)

17.3.1 Time Monitor

When enabled, the Time Monitor checks that the local timers on a number of systems are progressing at the same rate of time. Here the definition of 'systems' includes the 'standard systems' such as Inform Server, NiceLog loggers only data sources, NiceCLS data sources, NICE Interaction Management data sources and an extra list of user defined servers (see Monitoring Remote Microsoft Windows servers below).

At periodic intervals (specified by the Polling Frequency) the time elapsed on these systems is compared with the time elapsed on the NICE Inform server host system. If the difference is greater than the threshold value (the Margin of Error) an audit event is raised. You can view this audit event in the NICE Inform Audit application.

There are a number of configurable options which (once set) raise such an audit event once the Time Monitor feature has been enabled:

- **Polling Frequency** - How often the Time Monitor checks for time discrepancies. Enter a figure in the text box and then from the drop down list, select either minutes or hours as required.
- **Margin of error (when polling locally)** - Set the margin of error when monitoring the time on the Inform server (locally). Enter a figure in the text box and then from the drop down list, select either seconds or minutes as required.
- **Margin of error (when polling over the network)** - Set the margin of error when monitoring the time on anything that is coming over the network. Enter a figure in the

text box and then from the drop down list, select either seconds or minutes as required.

Monitoring remote servers

In addition, to checking the standard servers mentioned in the Time Monitor section you can add a custom list of Microsoft Windows servers and/or workstation's which can be monitored for time synchronization.

This feature requires the Time Monitor feature enabled. When enabled the following options are available to you:

Adding a server

- To add a server or workstation for monitoring:

1. Click the **Add** button and the **Add Server** dialog is presented.
2. Enter the following details:
   - **Label** - enter a name (label) for the server or workstation in the text box provided.
   - **Network address -** enter the hostname or IP address for the server or workstation in the text box provided.
3. Click the **OK** button followed by the **Save** button. The server or workstation is now added in the **Monitored Servers** table.

NOTE: The Monitored Servers table also shows **ALL** servers that are being monitored. You **CANNOT** edit or remove these servers.

Editing a server

- To edit a server or workstation:

1. Click the **Edit** button and the **Edit Server** dialog is presented.
2. Edit the following details:
   - **Label** - edit the name (label) for the server or workstation in the text box provided.
   - **Network address** - edit the hostname or IP address for the server or client workstation in the text box provided.
3. Click the **OK** button followed by the **Save** button to confirm the changes you have made.

Removing a server

- To remove a server or a workstation so that is no longer monitored:

1. Select the Microsoft Windows server from within the **Monitored Servers** table.
2. Click the **Remove** button followed by the **Save** button.

17.3.2 Check Paired Resources

This section provides an automated system check for matching errors between paired resources.

Enable this option by checking the **Periodically check paired resources for matching errors** box. Any paired resources that do not match are displayed as an audit event in the NICE Inform Audit application. In addition, an SNMP trap is raised.

NOTE: Only **Channel**, **Radio**, **Telephony** and **Text** resource types are checked.

17.3.3 Tamper Detection

This section identifies potential security risks by detecting if the NICE Inform databases have been altered and whether the code has been changed within NICE Inform.

- To check for database and code tampering:

1. Enable this feature by checking the **Enable tamper detection** box.
2. Click the **Check Button** to perform the database and code tamper checks.
3. The System integrity section displays details of any detected tampering. By design, the initial check always results in a **Data tampering detected** message. This is normal behavior.

   If any tampering has been detected, an audit event is raised whereby you can view what tables and/or what code modules have been tampered with by using the NICE Inform Audit application.

NOTE: When changing a resilience environment (e.g. switching to a master server), code tampering may be detected. Please review the audit event for details.

If you have used NICE Inform Database Backup Wizard (refer to NICE Inform Database backups (see page 248)) to back up the NICE Inform databases, then you can restore the database that has been tampered with to an earlier date when its data was still correct by using the SQL Enterprise Manager.

NOTE: Writing to any database using the NICE Inform application suite does **NOT** affect this tampering check.

4. Click the **Reset** button to reset the tamper detection. If the System integrity status message is **OK**, data tampering has been reset successfully.

NOTE: Clicking the **Reset** button does **NOT** repair the tampered database or code modules.

17.3.4 EMC Centera

If you have an EMC Centera storage device, you can configure it in this section. Once configured, you can set it as your default storage management for all future incident and evaluation storage. For help configuring incident and evaluation storage, (refer to Managing incident and evaluation storage (see page 181)).

The following options are available:

Adding an EMC Centera device

- To add an EMC Centera device:

1. Click the **Add** button and the **Add EMC Centera** dialog is presented.
2. Enter the following details:
   - **EMC Centera location -** enter the hostname or IP address for the Centera device in the text box provided.
   - **Configuration file** - enter the file path for the configuration file which has been exported from the Centera in the text box provided (usually a .pea file).

NOTE: In this text box, you are specifying a file path that is located on the NICE Inform server. The configuration file **MUST** already exist prior to adding the Centera device.

3. Click the **OK** button to followed by the **Save** button. The EMC Centera device is now added in the **EMC Centera** table.

Editing an EMC Centera device

- To edit an EMC Centera device:

1. Select the EMC Centera device from the **EMC Centera** table.
2. Click the **Edit** button and the **Edit EMC Centera** dialog is presented.
3. Edit the following details:
   - **EMC Centera location -** edit the hostname or IP address for the Centera device in the text box provided.
   - **Configuration file -** edit the file path for the configuration file which has been exported from the Centera in the text box provided.
4. Click the **OK** button followed by the **Save** button to confirm the changes you have made.

Removing an EMC Centera device

- To remove an EMC Centera device:

1. Select the EMC Centera device from the **EMC Centera** table.
2. Click the **Remove** button followed by the **Save** button.

17.4 Creating a master Inform server

NOTE: Specific terminology is used when navigating the tree pane to edit NICE Inform server details. For help with this terminology, refer to Tree structure terminology (see page 4).

In order to use the Server Resilience section you **MUST** be licensed for Server Resilience (refer to Importing licensing details (see page 188)).

To create a master NICE Inform server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Inform Servers** node and select the required **Inform server** node.
3. Click the **General** tab and the **General** page is presented displaying the NICE Inform server details.
4. Within the **Server Resilience** section:
   a. Using the down arrow set the **Type** option to **Master**.
   b. Change the default resilience **Folder path** if required although it is recommended that you choose a destination for the resilience files that is **NOT** on the same disk drive as the operating system. The default destination for NICE Inform server resilience is *D:\NICE Inform\ServerResilience\NiceInformResilience*.
5. On completion, click the **Save** button to commit the changes.

17.5 Adding a standby Inform server

NOTE: Specific terminology is used when navigating the tree pane when adding a standby NICE Inform server. For help with this terminology, refer to Tree structure terminology (see page 4).

A standby NICE Inform server can **ONLY** be added from a NICE Inform server that has been set to a master (refer to Editing Inform server details (see page 169)).

The standby NICE Inform server **MUST** be licensed for NICE Inform Server Resilience (refer to Importing licensing details (see page 188)).

To add a standby NICE Inform server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Inform Servers** node.

3. Click the **Add** button and select the **Add NICE Inform Server** option from the drop down menu. The **General** page is presented.

NOTE: Before you can add a standby NICE Inform resilient server, you **MUST** ensure that you have created a master NICE Inform server. If not, you are presented with a message informing you to do so. For help setting a NICE Inform server as a master, refer to Editing Inform server details (see page 169).

4. Enter the following server information:
   - **Label** - enter the label (name) for the NICE Inform server in the text box provided.
   - **Network address** - enter the network address or hostname of the NICE Inform server in the text box provided.
   - **Description** - enter a description relating to the NICE Inform server in the text box provided.
5. Within the **Server Resilience** section, the **Type** option is grayed out and set to **Standby**.
6. Change the default resilience **Folder path** if required although it is recommended that the default path should be used. The folder path is where the resilience files are stored.
7. On completion, click the **Add** button to commit the changes.

NOTE: When adding a standby NICE Inform server, a message is presented informing that all users will be automatically logged out from the NICE Inform standby server that is being added. All users **CANNOT** log back in until the NICE Inform standby server has automatically been reconfigured and restarted. Click the **Yes** button to continue.

All NICE Inform standby servers are displayed in the tree pane under the **Inform Servers** node.

Inform server resilience status

The **Status Details** table displays information relating to the NICE Inform databases. The table displays the following information:

Table 17-3: Status Details table columns (Inform server resilience)

Column	Description
i	If the server is either uncontactable or has been misconfigured then an icon is displayed informing you that there is a problem. If a server is contactable and there is an error backing up one or more NICE Inform databases, the icon displayed for each database that has an error.
Database	The name of the NICE Inform database.
Last Backup	The date and time that the last backup was made.
Status	Any errors occurred when backing up the database are displayed here. If there are no errors the status column is empty. NOTE: It can take a short while before the status information is

Column	Description
	retrieved from all the standby Inform servers.

17.6 Changing the role of a standby Inform server

NOTE: Specific terminology is used when navigating the tree pane to change the role of a standby NICE Inform server. For help with this terminology, refer to Tree structure terminology (see page 4).

If the master NICE Inform server becomes unreachable you have two options available:

Promoting a standby server to a master server

- To promote a standby NICE Inform server to a master NICE Inform server:

1. Log into NICE Inform on the standby NICE Inform server that you require to be the new master.
2. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
3. Expand the **Inform Servers** node and select the required **Inform server** node.
4. Click the **General** tab and the **General** page is presented displaying the NICE Inform server details.
5. Within the **Server Resilience** section set the **Type** to **Master**.
6. Change the default **Folder path** if required although it is recommended that the default path should be used. The folder path is where the resilience files are stored.
7. On completion, click the **Save** button to commit the changes.

The previous master NICE Inform server is automatically removed from the NICE Inform server configuration. Any additional standby servers are reconfigured as standby servers to the new master as long as they are reachable. If unreachable then they are removed from the NICE Inform server configuration.

NOTE: When the original master NICE Inform server becomes reachable again, it can be reintroduced as a resilient standby NICE Inform server. For help reintroducing it, refer to Reintroducing the original master Inform server (see page 178).

When changing a resilience environment (e.g. switching to a master NICE Inform server), code tampering may be detected. Please review the audit event for details. You can view this audit event in the NICE Inform Audit application.

Resetting a standby server to a standalone server

- To reset a standby NICE Inform server to a standalone NICE Inform server:

1. Log into NICE Inform on the standby NICE Inform server that you require to be a standalone NICE Inform server.

2. Expand the **Inform Servers** node and select the required **Inform server** node.

3. Click the **General** tab and the **General** page is presented displaying the NICE Inform server details.

4. Within the **Server Resilience** section set the **Type** to **Standalone**.

5. On completion, click the **Save** button to commit the changes.

The previous master NICE Inform server and any additional standby NICE Inform servers are automatically removed from the NICE Inform server configuration.

17.7 Reintroducing the original master Inform server

When the original master NICE Inform server becomes reachable again, it can be reintroduced as a resilient standby NICE Inform server.

NOTE: Specific terminology is used when navigating the tree pane to reintroduce the original master NICE Inform server. For help with this terminology, refer to Tree structure terminology (see page 4).

Before you reintroduce the original standby NICE Inform server, you **MUST** run the ResetResiliencyConfiguration.sql script. This is located in the **\Tools\Scripts** folder on the installation media. There is an accompanying Readme file (Readme (resetting resilience.pdf)) to assist you in running the script.

In the event that the original NICE Inform server needs rebuilding you need to reinstall NICE Inform. Please refer to *NICE Inform Installation Guide* for help.

To reintroduce the original standby NICE Inform server:

1. Log into NICE Inform on the original master NICE Inform server.

2. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

3. Expand the **Inform Servers** node and select the required **Inform server** node.

4. Click the **General** tab and the **General** page is presented displaying the NICE Inform server details.

5. Within the **Server Resilience** section set the **Type** to **Standalone**.

6. Log into NICE Inform on the current master NICE Inform server.

7. Add the original master NICE Inform server as a standby NICE Inform server. For help adding standby NICE Inform server, refer to Adding a standby Inform server (see page 175).

17.8 Deleting a standby Inform server

NOTE: Specific terminology is used when navigating the tree pane to delete a standby NICE Inform server. For help with this terminology, refer to Tree structure terminology (see page 4).

- To delete a standby NICE Inform server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Inform Servers** node and select the required **Inform server** node.
3. Click the **Delete Inform server** button.
4. A message is presented informing you that this is a resilient standby NICE Inform server and after deletion, it will be configured as a standalone NICE Inform server. Click the **Yes** button.

The standby NICE Inform server is now deleted.

NOTE: You **CANNOT** delete a master or standalone NICE Inform server.

17.9 Inform server resilience failover

When there is more than one NICE Inform server present in the system the workstation will automatically fail over to a second NICE Inform server if it detects that it has either lost the connection to the current NICE Inform server (either for scheduled maintenance or actual failure) or the current NICE Inform server loses its database connection.

NOTE: Failover **ONLY** occurs if your system is configured for NICE Inform server resilience.

Any unsaved work prior to the NICE Inform server becoming unavailable may become lost.

- If the NICE Inform server to which you are currently connected becomes unavailable:

1. You are initially presented with a message asking you if you want to reconnect to an alternative NICE Inform server.
2. Click the **Yes** button to try and reconnect to an alternative NICE Inform server.
3. The NICE Inform application suite now closes.
4. You are now automatically logged in to an alternative NICE Inform server.

NOTE: Your login details and the NICE Inform application that you were using are remembered. Therefore, once you connect to an alternative standby NICE Inform server, it automatically logs you in to the same application.

Once the Initial NICE Inform server is available again, close the NICE Inform application, re-launch Microsoft Internet Explorer and open NICE Inform from your web link or Internet favorite.

When NICE Inform standby server is isolated from NICE Inform master server

There are several features that become unavailable if the NICE Inform standby server becomes isolated from the NICE Inform master server. This is because the master server has become unavailable or the standby server cannot connect to it.

These include most features that write information to a NICE Inform database that is controlled by the master NICE Inform server. These features are:

Table 17-4: NICE Inform standby server unavailable features

Application	Unavailable feature
NICE Inform Verify	Saving user preferences. Refer to your NICE Inform Verify user documentation to customize preferences which are then saved to your workstation.
NICE Inform Monitor	Saving user preferences in the Monitoring panel & saving user preferences in the Recent Calls panel.
NICE Inform Reconstruction	Saving user preferences.
NICE Inform Reconstruction	Saving searches.
NICE Inform Reconstruction	Adding to NICE Inform Organizer using the Add to Organizer Wizard and Smart Transfer to Organizer Wizard.
NICE Inform Reconstruction	Adding and updating annotations.
NICE Inform Organizer	The application is disabled.
NICE Inform Evaluator	The application is disabled.
NICE Inform User Administration	The application is disabled.
NICE Inform System Administration	The application is disabled apart from being able to promote a standby NICE Inform server to a master NICE Inform server and being able to add, edit and delete NICE Inform standby servers.
NICE Inform Audit	Saving user preferences.
NICE Inform Reporter	The application is disabled.

17.10 Managing incident and evaluation storage

NOTE: Specific terminology is used when navigating the tree pane to manage settings for incident and evaluation storage. For help with this terminology, refer to Tree structure terminology (see page 4).

- To manage the settings for incident and evaluation storage:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Inform Servers** node.
3. Click the **Incident Storage** tab and the **Incident Storage** page is presented. The page is different depending on the **System type** you select within the **Storage Management** section.
4. The following sections are available:

At the **Storage Management** section, what you select from the System type drop down list depends on what incident and evaluation storage configuration options you have available to you.

Select one of the following:

- **File share** - to configure your incident/evaluation storage and incident/evaluation retention using file share (refer to Managing incident and evaluation storage for file sharing (see page 181)).
- **EMC Centera** - to configure your incident and evaluation storage using an EMC Centera device (refer to Managing incident and evaluation storage for EMC Centera (see page 184)).

17.10.1 Managing incident and evaluation storage for file sharing

- To manage incident and evaluation storage for file sharing, use the following sections:

Storage Management

1. Navigate to the **Incident Storage** page and select the **File share** option from the **System type** drop down list. For help, refer to Managing incident and evaluation storage (see page 181).
2. Enter a valid file path in the **Path** text box. This path is where all future incident data will be stored.

   Changing the path for the incident storage enables you to create a network share on a different device e.g. a NAS (Network Attached Storage device) and thus providing you with a dedicated resource to store all your future incident data.

NOTE: For a resilience NICE Inform system, the storage location **MUST** be a network share specified by a UNC path e.g. *ServerName**IncidentStorage*.

3. Once you have entered a valid file path, click the **Verify** button. This tests the path and displays free and used space on the storage device in the pie chart below.

4. The following issues may occur when verifying the path:

   – If the path is incorrect or unreachable, you are presented with an error message informing you that the verification process found the storage path to be invalid.

   – If the path does not exist, you are presented with a message informing you of this and whether you wish to create the new folder. Click the **Yes** button and the verification process completes.

   – If the path cannot be verified, the pie chart is replaced with text informing you that the specified path was not verified. Ensure that you enter a valid path and click the **Verify** button.

NOTE: Changing the incident storage file path affects all future incident storage. It does **NOT** affect existing incidents even if further recordings etc. are added to an existing incident. In this instance, the incidents are still stored in the original location to avoid splitting incidents over two or more storage locations.

Incident and Evaluation Storage Usage

The Incident and Evaluation Storage Usage section provides a graphical view of the free space and used space on the incident and evaluation storage device in the form of a pie chart. In addition, you can set storage thresholds in order to generate events in NICE Inform Audit and SNMP traps when a chosen threshold has been reached.

NOTE: This is the space available on the drive and does **NOT** imply the size of the incident and evaluation storage.

If thresholds are not set then incident data is written to the storage location until it is full with **NO** threshold warnings.

▸ To customize the incident storage usage:

1. Check the **Storage thresholds** box to enable the **Storage Usage** section and select one of the following:

   – **Used storage space** - threshold triggers once a predefined amount of storage space has been used.

   – **Remaining storage space** - threshold triggers once a predefined amount of storage space is left.

2. At the **Warning** option, enter a value with a corresponding measure. The options are MB (Megabyte), GB (Gigabyte), TB (Terabyte) or % (percentage). This warning threshold is displayed as a blue line within the pie chart when the **Show markers** box is checked.

3. At the **Maximum** option, enter a value with a corresponding measure. The options are MB (Megabyte), GB (Gigabyte), TB (Terabyte) or % (percentage). No additional data is written to the storage device once this maximum level has been reached. This maximum threshold is displayed as a blue line within the pie chart when the **Show markers** box is checked.

NOTE: If the warning threshold is bigger than the maximum threshold or the maximum threshold is beyond the physical size of your storage device, when clicking the **Save**, button you are presented with a warning message informing you of this and therefore you cannot save your storage usage threshold settings.

Analyzing incident and evaluation storage

- If you require viewing just incident and evaluation storage instead of overall storage on the device:

1. Click the **Details** button within the pie chart.
2. If you have made a storage usage change, a confirmation message is presented asking if you require saving any changes. Click the **Yes** button to continue.
3. A Progress screen is presented. All incident and evaluation data below the share path is summed. The **Details** button only works on saved data. If the path has been modified, the button is grayed out.
4. Click the **Close** button to close this screen.

Incident Retention Period

Within the Incident Retention Period section, you can set the retention period for all new incidents. This is a global setting and therefore **ANY** new incidents **CANNOT** be deleted before the set date once this feature is enabled.

- To enable the incident retention period:

1. Check the **Enable incident retention** box.
2. Set the number of days that all incidents are available for deletion in the text box provided or by using the up/down arrows.

   All incidents that are created from now on **CANNOT** be deleted before the number of days has elapsed. All incidents created prior to enabling this feature can be deleted but if you wish to set incident retention these global settings apply. They also automatically have incident retention enabled and their minimum availability for deletion set.

Evaluation Age Based Deletion

Within the Evaluation Age Based Deletion section, you can set the maximum period that media used in evaluations is stored for. All the media for the evaluation is deleted once the oldest recording start time in the evaluation reaches the age specified.

- To enable the evaluation age based deletion period:

1. Check the **Enable media deletion** retention box.
2. At the **Delete evaluation media after** option, using the up/down arrows, set the number of units and then click the down arrow and select either Days, Months or Years.

Incident Age Based Deletion

Within the Incident Age Based Deletion section, you can set the maximum period that incidents and their associated media are stored for. The incident and its media is deleted once the incident creation date reaches the age specified.

The following conditions apply:

- This setting **ONLY** applies to incidents which are not attached to an evaluation.

- If you require using this feature and it is not available and text is displayed instead informing you that this feature is not currently configurable, contact your system administrator for more information.
- If you have the **Incident Retention Period** feature configured and you set the incident age based deletion to a date before the incident retention date, the date that incidents are deleted will occur on the incident retention date.

To enable the incident age based deletion period:

1. Check the **Enable incident deletion** retention box.
2. At the **Delete incidents after** option, using the up/down arrows, set the number of units and then click the down arrow and select either Days, Months or Years.

Once you have configured the Incident Storage for file sharing, click the **Save** button to commit the changes.

17.10.2 Managing incident and evaluation storage for EMC Centera

To manage incident storage for EMC Centera, use the following sections:

Storage Management

1. Navigate to the Incident Storage page and select the **EMC Centera** option from the **System type** drop down list. For help, refer to Managing incident and evaluation storage (see page 181).
2. Check the box for the EMC Centera device from the **EMC Centera** table.

NOTE: For help adding an EMC Centera device in to the system, refer to EMC Centera (see page 173) in the Inform server settings (see page 171) section.

Incident Retention Period

Within the Incident Retention Period section, you can set the incident retention for all new incidents. This is a global setting and therefore **ANY** new incident that is created **CANNOT** be deleted before the set date once this feature is enabled.

To enable the retention period:

1. Check the **Enable incident** retention box.
2. Set the number of days that all incidents are available for deletion either in the text box provided or by using the up/down arrows.

   All incidents that are created from now on **CANNOT** be deleted before the number of days has elapsed. All incidents created prior to enabling this feature can be deleted but if you wish to set incident retention these global settings apply. They also automatically have incident retention enabled and their minimum availability for deletion set.

Evaluation Age Based Deletion

Within the Evaluation Age Based Deletion section, you can set the maximum period that media used in evaluations is stored for. All the media for the evaluation is deleted once the oldest recording start time in the evaluation reaches the age specified.

- To enable the evaluation age based deletion period:

1. Check the **Enable media deletion** retention box.
2. At the **Delete evaluation media after** option, using the up/down arrows, set the number of units and then click the down arrow and select either Days, Months or Years.

NOTE: A month period is 30 days.

Once you have configured the Incident Storage for EMC Centera, click the **Save** button to commit the changes.

17.11 Defining audit parameters

NOTE: Specific terminology is used when navigating the tree pane to define audit parameters. For help with this terminology, refer to Tree structure terminology (see page 4).

- To define audit parameters:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Inform Servers** node.
3. Click the **Audit** tab and the **Audit** page is presented.

The following sections are available:

Deletion Settings

Enter the required values in the following text boxes, which determine how many audit entries are kept in the system:

- **Maximum number of entries** - check the box and select the maximum number of audit entries that are kept in the system by using the provided up/down arrows.
- **Maximum age of entries -** check the box and select the number of days, weeks, months or years using the up/down arrows and associated drop down list. Any audit entries that are older than your selection will be deleted.

Audit Log Settings

- To configure the Audit log settings:

1. Check the **Raise an alarm when the size of the log has reached** box and enter a percentage in the corresponding **% of available space** text box (default 90%).

An audit alarm is triggered when the log file reaches the configured percentage space.

2. Once the audit settings have been configured, click the **Save** button.

Audit Event Entry Settings

Use this section to customize which audit events are available to search for within NICE Inform Audit (refer to *Searching for Audit events* in *NICE Inform Audit*).

NOTE: All the audit events are selected by default. For details of all audit events, refer to *NICE Inform audit events* in *NICE Inform Glossary*.

- To customize audit event settings:

1. Check/uncheck the **Applications**, their associated **Groups** and finally their corresponding **Audit Events** as required.

NOTE: Click the **Clear All** button to clear all the check boxes and click the **Select All** button to select all the check boxes.

2. Once complete, click the **Save** button.

17.12 Configuring Reporter warehouse and time zone

NOTE: Specific terminology is used when navigating the tree pane to configure the Reporter warehouse and time zone settings. For help with this terminology, refer to Tree structure terminology (see page 4).

The Reporter page is **NOT** available if your system is **NOT** licensed for NICE Inform Reporter.

The Reporter page allows you to configure the settings that manage the Reporter Warehouse database. The Reporter Warehouse database stores information collected from data sources (call records) that is used when reports are run.

- To configure the Reporter Warehouse settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Inform Servers** node.
3. Click the **Reporter Warehouse** tab and the **Reporter Warehouse** page is presented.
4. The following sections are available:

Time Zone

- **Reporter Reference time zone** - a list of system times zones available to the NICE Inform server are displayed in the list. Click the down arrow and select the required time zone.

NOTE: All reports that are run will use this time zone and **NOT** the time zone on the NICE Inform workstation.

Once you set the time zone and click the **Save** button, a confirmation message is presented stating that the Reporter reference time zone cannot be changed after it has been set. Once you click the **Yes** button to this message, the option is grayed out and unavailable for selection.

Data Collection

The following option is available:

- **Reference time zone** - a list of system times zones available to the NICE Inform server are displayed in the list. Click the down arrow and select the required time zone.

NOTE: All reports that are run will use this time zone and **NOT** the time zone on the NICE Inform workstation.

- **Start date for warehouse data** - the date that NICE Inform Reporter starts collecting its data from. Call records are collected when this has been set. This can take some time depending on the amount of data to be collected. Date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).

NOTE: Once you have configured (and saved) the reference time zone and warehouse start date, you **CANNOT** change them again. All you are able to do is enable and disable the data collection.

- **Warehouse data valid up to** - the oldest checkpoint date and time (in the server reference time zone) for any resource currently being collected. If no data has yet been collected, **Not available** is displayed.

NOTE: If a new data source has been added to the system that is to be used to generate reports from, the Warehouse data valid up to field will be reset as calls from that data source will not have been archived into the warehouse yet.

Fill Status

The Fill Status section provides a graphical view of the free space and used space on the Reporter warehouse database in the form of a pie chart.

NOTE: This is the space available on the drive and does **NOT** imply the size of the report storage.

▶ To customize the fill status for your warehouse storage:

1. Check the **Raise a warning when the used space reaches** box.
2. Set a percentage value. When this value is reached, a storage alarm is raised. Set the percentage of available space into the text box provided. Entry is assisted by using the up/down arrows.
3. Click the **Details** button to display storage details.

4. A Progress screen is presented providing the following details:
   - **Used space -** KB, MB, GB or TB.
   - **Available space** - KB, MB, GB or TB.
   - **Total size** - KB, MB, GB or TB.
   - **Fill estimation** - the estimation when the remaining storage will be full (in years and months).
   - **Fill date** - date estimation when the database will become full.
5. Click the **Close** button to close the Progress screen.

Data Retention

Within the data retention section, you can set the warehouse retention period for all data source records. This is a global setting and therefore any records will not be deleted if they are newer than the retention date.

- To enable data retention:

1. Check the **Enable Reporter warehouse data retention** box.
2. Set the number of either months (maximum of 60 (minimum of 2)) or years (maximum of 5) that all reports are available for deletion in the text box provided or by using the up/down arrows.
3. Click the drop down arrow and select either **months** or **years**.

   All data that is stored from now on **CANNOT** be deleted before the number of months or years has elapsed.
4. Within the **Behavior if the Reporter warehouse database becomes full** section, select one of the following:
   - **Stop inserting new records -** new records are stopped being inserted into the Reporter warehouse database once it becomes full.
   - **Overwrite oldest records -** the oldest records are overwritten first once the Reporter warehouse database becomes full.
5. On completion, click the **Save** button to commit the changes.

NOTE: If you click the **Save** button with the **Enable data collection** option enabled but either the **Reporter reference time zone** is not specified or the **Start date for warehouse data** is not set, you are prompted to provide both of these settings.

17.13 Importing licensing details

NOTE: Specific terminology is used when navigating the tree pane to import licensing details. For help with this terminology, refer to Tree structure terminology (see page 4).

To gain access to all the NICE Inform applications that you have purchased, you need to import the license file provided by NICE. Until you have imported the licensing details, you only have access to NICE User Administration and System Administration applications.

NOTE: You only need to import the licensing details once per installation of NICE Inform.

▸ To import licensing details:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Inform Servers** node.
3. Click the **Licensing** tab and the **Licensing** page is presented.
4. Click the **Import** button and the **Import License Wizard** opens at the **Welcome** screen.
5. Click the **Next** button and the **Select License File** screen is presented.
6. Do one of the following:
   - Click the **Browse** button and locate the licensing file that has been provided to you from NICE. Once the file has been located, click the **Open** button.
   - Enter the path for the license file in the text box provided.
7. Click the **Next** button and the **Summary** screen is presented. Check that the details relating to the licensing information that you have imported are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.
8. A Wizard Progress dialog is presented providing a summary of the license that is being imported.
9. Do one of the following:
   - Check the **Close dialog when complete** box, which causes the dialog to close automatically shortly after the import process completes, unless an error has occurred.
   - Once the import process is complete, click the **Close** button to close the dialog.

NOTE: For the licensing details to take effect, all users **MUST** first log out and then log back into NICE Inform.

The Licensing page now updates and displays the newly imported licensing details.

Information displayed includes:

Table 17-5: License information

License information	Description
Customer name	The name of the customer for the license.
Sales order number	The number provided by NICE as part of your order.
License serial number	The unique license serial number.
License version	The version of the license.
License date	The date that the license was generated.
License state	The license state. The state is either: ▪ **Valid** - the license state is valid. ▪ **Invalid** - the license state is invalid. ▪ **Partially valid** - one feature is overdrawn rendering the license to enter the grace period. ▪ **Expired** - the license state is expired.

The License Details table provides a breakdown of the licensing information features (applications and resources). Information here includes:

Table 17-6: License Details table columns

License detail column	Description
Feature	The name of the licensed feature.
Value	**Yes**/**No** (if license is enabled/disabled) or a number value (the maximum number of licenses which can be assigned to users or resources).
Remaining	The available number of licenses/resources left. If this is a negative figure then you have exceeded all your available licenses and therefore you are in a grace period.

Grace period

In exceptional circumstances, you may require to exceed your license parameters by perhaps adding more users and resources etc. The grace period is provided for these circumstances whereby you can act instantly permitting you to add these users and resources etc. By default, this period lasts for 30 days.

When one or more of the license parameters has been exceeded, the license still remains valid.

When the grace period of 30 days ends, the license reverts back to its original parameters.

NOTE: Grace period is **NOT** applicable for concurrent user licensing.

Further licensing information

For further details regarding licensing information, refer to *Licensing information* in *Getting started*.

17.14 Configuring SNMP settings

Use the SNMP Settings page to enable SNMP traps generated by NICE inform to be sent to an SNMP management tool e.g. NICE Inform Health Manager. During the configuration you specify which SNMP version you require to configure and then you can add multiple destinations to send traps to. A separate trap will be sent for each critical, major and minor alarm severity.

- To configure SNMP settings:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Inform Servers** node.
3. Click the **SNMP Settings** tab and the **SNMP Settings** page is presented.
4. Click the **SNMP version** down arrow and select either **SNMP v1/v2c** or **SNMP v3** from the list. Refer to the sections below to help configure the required SNMP version.
5. Configure the following options which are applicable to all SNMP versions:
   - **Port number** - enter the port provided by the SNMP service, which must be used to send traps to the SNMP Management tool. Entry is assisted by clicking the up/down arrows.
   - **Send authentication failure** - check the box and a trap is sent back to the destination providing information as to why the connection failed.

SNMP v1/v2c

Configure the following settings:

- **Destinations** (to send traps for SNMP v1/v2c) - refer to the Configuring destinations section below for more information.
- **Community string** - enter the community string in the text box provided which is similar to username and password credentials enabling the two devices to communicate with each other.

SNMP v3

Configure the following settings:

- **Engine ID** - the Engine ID is used to uniquely identify both NICE Inform SNMP Service and the SNMP Manager (e.g. NICE Inform Health Manager) so they can talk to each other directly. This field is prepopulated and is read-only.
- **Security model** - defines the security model of the communication between NICE Inform and the SNMP Manager. Select one of the following security models:
  - **No authentication - No privacy** - no security is applied however, you must enter an Authentication name.

NOTE: Both the **Authentication - No privacy** and **Authentication - Privacy** options are disabled once you select the **No authentication - No privacy** option.

- **Authentication - No privacy** - SNMP communication is authenticated against the Authentication name and Authentication password.

NOTE: The **Authentication - Privacy** option is disabled when you select the **Authentication - No privacy** option.

- **Authentication - Privacy** - SNMP communication is authenticated and encrypted. It is authenticated by not only using the **Authentication name** and **Authentication password** but the **Privacy password** and **Privacy protocol** as well (see below). These options therefore become available for selection.

- **Destinations** (to send traps for SNMP v3) - refer to the Configuring destinations section below for more information.
- **Authentication setting** - configure the following authentication settings:
  - **Password** - enter the authentication password in the text box provided. This field is only available if the **Security model** is set to either **Authentication - No privacy** or **Authentication - Privacy** and must be populated with the password that matches the authentication password configured on the SNMP Server.
  - **Protocol** - click the down arrow and select the required authentication protocol from the list. This field is only available if the **Security level** is set to either **Authentication - No privacy** or **Authentication - Privacy**. The authentication protocol can be either **None**, **MD5** or **SHA** and must match that configured on the SNMP server.
- **Privacy setting** - configure the following privacy settings:
  - **Privacy password** - enter the privacy password in the text box provided. This field is only available if the **Security model** is set to **Authentication - Privacy** and must be populated with the password that matches the Privacy password configured on the SNMP server.
  - **Privacy protocol** - click the down arrow and select the required privacy protocol. This field is only available if the **Security level** is set to **Authentication - Privacy**. The authentication protocol can either be **None**, **DES**, **TRIPLEDES**, **AES128**, **AES192** or **ASE256** and must match that configured on the SNMP server.

Configuring destinations

Once you have configured your SNMP settings, you must add at least one destination to send the traps to. This destination is a SNMP Management tool such as NICE Inform Health Manager.

NOTE: A maximum of five destinations can be added.

Adding a destination

To add a new destination:

1. Click the **Add** button and the **Add Destination** dialog is presented.
2. Enter the following information using the text boxes provided:
   - **Label** - The name for the destination.

- **Network address** - the IP address or Hostname for the destination SNMP Server which is used to receive SNMP traps.
- **Port number** - the port number for the destination SNMP Server which is used to receive SNMP traps. Entry is assisted by clicking the up/down arrows.

3. Click the **Add** button.

The destination is now added to the **Destination** table.

Removing a destination

▸ To remove a destination:

1. Select the required destination within the **Destinations** table.
2. Click the **Remove** button.
3. A confirmation message is displayed asking if you are sure you want to remove this destination. Click the **Yes** button.

The destination is removed from the **Destinations** table.

NOTE:	Once you have completed your SNMP configuration settings, click the **Save** button.

18 Hub accounts

NOTE: Specific terminology is used when navigating the tree pane to configure hub accounts. For help with this terminology, refer to Tree structure terminology (see page 4).

A hub account can be added to the system. When this NICE Inform system is added as a NICE Inform hub data source (refer to Adding a data source (see page 17)) in another NICE Inform system this hub account is used to gain access to the resources that have been assigned to the account.

This provides the ability for the NICE Inform system to replay recordings etc. that derive from resources on another NICE Inform system which often resides in a different geographical location.

The following resource types are supported when assigning resources to a hub account:

- NICE Recording/NICE Inform Recorder audio resources
- NLS audio resources
- NICE Interaction Management resources
- Media vault resources
- VPI Audio Logger resources

NOTE: Any resources from NICE Inform hub data sources are **NOT** supported.

To configure hub accounts:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Hub Accounts** node and the **General** page is presented.

The following functions are available:

- Adding a hub account (see page 194)
- Editing a hub account (see page 196)
- Deleting a hub account (see page 196)
- Assigning resources to a hub account (see page 197)
- Removing resources from a hub account (see page 198)

18.1 Adding a hub account

NOTE: Specific terminology is used when navigating the tree pane to add a hub account. For help with this terminology, refer to Tree structure terminology (see page 4).

To add a new hub account so that another NICE Inform system can gain access to the resources that have been assigned to this account:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Hub Accounts** node and the **General** page is presented.
3. Click the **Add** button and the **New Hub Account Wizard** starts at the **Welcome** screen.
4. Click the **Next** button and the **Hub Account Details** screen is presented.
5. Enter the following details using the text boxes provided:
   - **Name** - the name for the hub account.
   - **Password** - the password for the hub account.
   - **Confirm password** - the password confirmed for the hub account.

NOTE: The hub account password **MUST** conform to the password rules (refer to *Changing your password* in *Getting Started*) with the exception of no second password and the password never expires.

The name and password details are required when adding the hub account details whilst adding the NICE Inform hub data source (refer to Adding a data source (see page 17)).

   - **Description** - the description for the hub account.
6. Click the **Next** button to continue and the **Assign Resources** screen is presented.
7. Do one of the following:
   - Click the **Recording systems** radio button to assign resources from a data source. Select the required resources.
   - Click the **Resource groups** radio button to assign resources from a resource group or resources from within a group. To add resources from within a resource group, select the individual resource group from the **Groups** tree and then select the resources you wish to add.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

You **CANNOT** assign a NICE Inform hub data source resources to a hub account.

8. Click the **Next** button to continue.
9. At the **Summary** screen, check that the details for the new hub account are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.
10. Click the **Finish** button to add the hub account.

18.2 Editing a hub account

NOTE: Specific terminology is used when navigating the tree pane to edit a hub account. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit a hub account:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Hub Accounts** node and the **General** page is presented.
3. Within the **Hub accounts** table, do one of the following:
   – Double-click the required hub account.
   – Select the required hub account and click the **Edit** button.

NOTE: In both cases, **the Edit Hub Account** dialog is presented.

4. Edit one or more of the following and where applicable use the text boxes provided:
   – **Name** - the name for the hub account.
   – **Password** - the password for the hub account.
   – **Confirm password** - the password confirmed for the hub account.

NOTE: The hub account password **MUST** conform to the password rules (refer to *Changing your password* in *Getting Started*).

The name and password details are required when adding the hub account details whilst adding the NICE Inform hub data source (refer to Adding a data source (see page 17)).

   – Description - the description for the hub account.
5. Click the **OK** button to confirm the changes to the hub account.
6. Click the **Save** button.

18.3 Deleting a hub account

NOTE: Specific terminology is used when navigating the tree pane to delete a hub account. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a hub account:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Select the **Hub Accounts** node and the **General** page is presented.
3. Select the required hub account from the **Hub accounts** table.
4. Click the **Delete** button. A message is presented confirming the deletion.
5. Click the **Yes** button followed by the **Save** button.

The hub account is now deleted.

18.4 Assigning resources to a hub account

NOTE: Specific terminology is used when navigating the tree pane to assign resources to a hub account. For help with this terminology, refer to Tree structure terminology (see page 4).

You **CANNOT** assign NICE Inform hub data source resources to a hub account.

- To assign resources to a hub account so that another NICE Inform system can gain access to the resources that have been assigned to this account:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Hub Accounts** node and the **General** page is presented.
3. Select the required hub account from the **Hub accounts** table to assign resources to.
4. Within the **Assigned resources** section, click the **Assign** button. The **Assign Resources** dialog is presented.
5. Do one of the following:
   - Click the **Recording systems** radio button to assign resources from a data source. Select the required resources.
   - Click the **Resource groups** radio button to assign resources from a resource group or resources from within a group. To add resources from within a resource group, select the individual resource group from the Groups tree and then select the resources you wish to add.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

When **Maintenance mode** is enabled (refer to Editing site details (see page 10)) and you are adding or removing a resource to (or from) from the **Selected resources** list, all secondary resources are displayed (if configured). If your selection contains at least one primary or secondary resource, when the other resource of the pair is not selected, a message is displayed asking whether you require adding or removing the pair or not.

6. Click the **OK** button followed by the **Save** button.

18.5 Removing resources from a hub account

NOTE: Specific terminology is used when navigating the tree pane to assign resources to a hub account. For help with this terminology, refer to Tree structure terminology (see page 4).

- To remove resources from a hub account:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Hub Accounts** node and the **General** page is presented.
3. Select the required hub account from the **Hub accounts** table to remove resources from.
4. Select the required resource or resources (using Microsoft Windows standard Shift and Ctrl methods) from the **Assigned resources** table.
5. Click the **Remove** button. A message is presented confirming the deletion.
6. Click the **Yes** button followed by the **Save** button.

The resources are now removed from the hub account.

19 Mapping

NOTE: Specific terminology is used when navigating the tree pane to configure mapping. For help with this terminology, refer to Tree structure terminology (see page 4).

A map is made up of different layers which create a view. A layer can either be in a SHP, OpenStreetMap or in a ArcGIS file format.

For example, a layer could consist of:

- A map of a city.
- Major roads of a city.
- Minor roads of a city.
- A transportation map of an underground railway network of a city.
- Buildings within a city.
  - A floor plan of a building within a city.

Views are displayed in the *GIS Map panel* in *NICE Inform Reconstruction*).

▸ To configure mapping:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Mapping** node and the **General** page is presented.

The following functions are available:

- Adding a view (see page 199)
- Editing a view (see page 200)
- Deleting a view (see page 201)
- Adding a layer (see page 201)
- Editing a layer (see page 202)
- Deleting a layer (see page 204)

19.1 Adding a view

NOTE: Specific terminology is used when navigating the tree pane to add a view. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To add a view:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Mapping** node and the **Maps** page is presented.

3. Within the **Views** section, click the **Add** button. The **Add View** dialog is presented.

4. At the **Label** text box, enter a unique meaningful name for the view.

5. Within the **Bounding box** section, you can set latitude and longitude coordinates to zoom into the map once loaded. To set the bounding box coordinates:

   a. Click the + button to expand the **Bounding Box** section.
   b. Enter the minimum and maximum latitude and longitude coordinates in the **X/Y Min** and **Max** text boxes.

6. On completion, click the **OK** button to add the view. The new view is now located within the **Views** table.

7. Click the **Save** button.

NOTE: Once you have added your view you **MUST** add at least one layer to the view. For help adding a layer, refer to Adding a layer (see page 201).

19.2 Editing a view

NOTE: Specific terminology is used when navigating the tree pane to edit a view. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit a view:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Select the **Mapping** node and the **Maps** page is presented. Within the **Views** table, do one of the following:

   – Double-click the required view.

   – Select the required view and click the **Edit** button.

NOTE: In both cases, the **Edit View** dialog is presented.

3. At the **Label** text box, edit the name for the view.

4. Within the **Bounding box** section, you can edit the latitude and longitude coordinates to zoom into the map once loaded. To edit the bounding box coordinates:

   a. Click the + button to expand the **Bounding Box** section.
   b. Edit the minimum and maximum latitude and longitude coordinates in the **X/Y Min** and **Max** text boxes.

5. On completion, click the **OK** button to update the view. The view is now updated in the **Views** table.

6. Click the **Save** button.

19.3 Deleting a view

NOTE: Specific terminology is used when navigating the tree pane to delete a view. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a view:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Mapping** node and the **Maps** page is presented.
3. Select the required view or a group of views (using Microsoft Windows standard Shift and Ctrl methods) from the **Views** table.
4. Click the **Delete** button. A message is presented confirming the deletion.
5. Click the **Yes** button followed by the **Save** button.

The view is now deleted.

19.4 Adding a layer

NOTE: Specific terminology is used when navigating the tree pane to add a layer. For help with this terminology, refer to Tree structure terminology (see page 4).

Only tile based layers are supported when adding a layer.

To add a layer:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Mapping** node and the **Maps** page is presented.
3. Within the **Views** table, select the view that you require to add the layer to.
4. Within the **Layers** section, click the **Add** button. The **Add Layer** dialog is presented.
5. Enter a name for the layer in the **Label** text box.
6. Click the **Layer Type** down arrow and select the required layer type from the list.
7. At the **Path or URL** text box, do one of the following:
   - Enter the file location for the layer in the **Path** text box.
   - Click the **Browse** button, browse to the layer file location and click the **Open** button.

NOTE: In order to view the layer in each NICE Inform client, you **MUST** either add the file (e.g. shp file) in the exact same location on each NICE Inform client as it is on the NICE Inform Server or place the file on a network share accessible from all NICE Inform client workstations using a common file path.

- Enter the URL that points to a remote ArcIMS or ArcGIS server map service in the **Path** text box.

8. There are two further tile schema options that are **ONLY** available if you have selected the **ArcGIS map service** layer type at step 6:
   - **Use WMTS Tile Schema** - check the box to enable the use of the World Map Tile Schema (WMTS) tile source which is based on WMTS GetCapabilities.
   - **Custom Tile Schema** - check the box to enable the use of a NICE Inform custom generated tile schema which is imported as an xml file and contains information such as base URL, resolution levels, orientation information, and the coordination system.
9. On completion, click the **OK** button to add the layer. The new layer is now located within the **Layers** table.
10. Click the **Save** button.

List order controls

Use the list order controls to configure the order that the layers are displayed in the **Layers** table. Any layers added are automatically displayed on the view in the *GIS Map panel* within *NICE Inform Reconstruction*.

Table 19-1: List order controls

Button	Description
	Moves the highlighted layer to the top of the table.
	Moves the highlighted layer up one place in the table.
	Moves the highlighted layer down one place in the table.
	Moves the highlighted layer to the end of the table.

19.5 Editing a layer

NOTE: Specific terminology is used when navigating the tree pane to edit a layer. For help with this terminology, refer to Tree structure terminology (see page 4).

Only tile based layers are supported when editing a layer.

To edit a layer:

1. In the tree pane, expand the **Recording Systems**  node and then expand the **Site**  node.
2. Select the **Mapping**  node and the **Maps** page is presented.
3. Within the **Views** table, select the view that you require to edit the layer for.

4. Within the **Layers** section, do one of the following:
   - Double-click the required layer.
   - Select the required layer and click the **Edit** button.

NOTE: In both cases, the **Edit Layer** dialog is presented.

5. Edit the name for the layer in the **Label** text box.
6. Click the **Layer Type** down arrow and select the required layer type from the list.
7. At the **Path or URL** text box, do one of the following:
   - Edit the file location for the layer in the **Path** text box.
   - Click the **Browse** button, browse to a new layer file location and click the **Open** button.

NOTE: In order to view the layer in each NICE Inform client, you **MUST** either add the file (e.g. shp file) in the exact same location on each NICE Inform client as it is on the NICE Inform Server or place the file on a network share accessible from all NICE Inform client workstations using a common file path.

   - Edit the URL that points to a remote ArcIMS or ArcGIS server map service in the **Path** text box.
8. There are two further tile schema options that are **ONLY** available if you have selected the **ArcGIS map service** layer type at step 6:
   - **Use WMTS Tile Schema** - check the box to enable the use of the World Map Tile Schema (WMTS) tile source which is based on WMTS GetCapabilities.
   - **Custom Tile Schema** - check the box to enable the use of a NICE Inform custom generated tile schema which is imported as an xml file and contains information such as base URL, resolution levels, orientation information, and the coordination system.
9. On completion, click the **OK** button to update the layer. The layer is now updated within the **Layers** table.
10. Click the **Save** button.

List order controls

Use the list order controls to configure the order that the layers are displayed in the **Layers** table. Any layers added are automatically displayed on the view in the *GIS Map panel* within *NICE Inform Reconstruction*.

Table 19-2: List order controls

Button	Description
	Moves the highlighted layer to the top of the table.
	Moves the highlighted layer up one place in the table.
	Moves the highlighted layer down one place in the table.
	Moves the highlighted layer to the end of the table.

19.6 Deleting a layer

NOTE: Specific terminology is used when navigating the tree pane to delete a layer. For help with this terminology, refer to Tree structure terminology (see page 4).

- To delete a layer:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Mapping** node and the **Maps** page is presented.
3. Within the **Views** table, select the view that you require to delete the layer from.
4. Select the required layer or a group of layers (using Microsoft Windows standard Shift and Ctrl methods) from the **Layers** table.
5. Click the **Delete** button. A message is presented confirming the deletion.
6. Click the **Yes** button followed by the **Save** button.

The layer is now deleted.

20 Audio Analytics

NOTE: Specific terminology is used when navigating the tree pane to configure NICE Inform Audio analytics. For help with this terminology, refer to Tree structure terminology (see page 4).

NICE Inform Audio analytics is the process of identifying the words spoken in audio recordings. Once identified, those words can be searched for key words and phrases using NICE Inform Reconstruction.

- To configure NICE Inform Audio analytics:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and the following nodes are available for selection:

NOTE: The Audio Analytics node is not displayed if your system is **NOT** licensed for NICE Inform Audio Analytics.

   – Analytics Servers (see page 206) - enables you to configure the:
      - Analytics servers.
      - Indexing server where your text output is stored and can be searched from.
      - Audio resources that the word discovery engine uses to convert to text.
      - Analytics categories (see page 210) used to create a group of related matching words and phrases.

   – Analytics Engines (see page 216) - word discovery engines are the only analytics engine type available for configuration. These are used to identify words and phrases within audio recordings and then convert them to text.

20.1 Audio Analytics prerequisites

- In order to use NICE Inform Audio Analytics, you need to perform the following steps:

1. Create a new NICE inform user (refer to *Adding a new user to the system* in *NICE Inform User Administration*).

NOTE: If you have an existing user account for use with NICE Inform Audio Analytics, ensure you use that account.

2. Create a new user group (refer to Creating a new user group in NICE Inform User and add this user to the group (refer to *Creating a new user group* and *Adding user group members* in *NICE Inform User Administration*.

NOTE: If you have an existing user group, ensure you use that one and add the user to it.

3. Attach the required resources that will be analyzed by the user to the resource group (refer to *Attaching resources to a user group* in *NICE Inform User Administration*.

4. Create a new profile (refer to *Creating a new profile* in *NICE Inform User Administration*) ensuring you add the NICE Inform API application and select the following application privileges:

   – Use NICE Inform API

   – Use search and retrieval API

NOTE: If you already have a profile configured, use this profile and ensure it has the NICE Inform API application and these privileges selected (refer to *Editing a profile* in *NICE Inform User Administration*).

5. Attach the profile to the user you have created (refer to *Attaching a profile to a user* in *NICE Inform User Administration*).

6. Add a new NICE Inform Analytics server (refer to Adding an analytics server (see page 207)) ensuring that you select the username and password for the user you created in step 1.

7. Add a new word discovery engine (refer to Adding a word discovery engine (see page 217)).

8. Add the required resources that are to be used for NICE Inform Audio Analytics (refer to *Adding resources to an analytics server* (see page 213)).

9. Configure any analytics categories (refer to *Adding a category* (see page 210)).

20.2 Analytics servers

NOTE: Specific terminology is used when navigating the tree pane to configure your analytics servers. For help with this terminology, refer to Tree structure terminology (see page 4).

An analytics server enables you to retrieve audio from selected resources for the process of converting the audio to text. The text output is then sent to the indexing server so that you can search for the results using NICE Inform Reconstruction.

▸ To configure analytics servers:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Audio Analytics** node and then select the **Analytics Servers** node.

The following is available within the Analytics Servers section:

- Adding an analytics server (see page 207)
- Editing an analytics server (see page 208)
- Deleting an analytics server (see page 209)

- Analytics servers details (see page 215)
- Analytics categories (see page 210)
- Indexing server settings (see page 213)
- Adding resources to an analytics server (see page 213)
- Editing analytics server resources (see page 214)
- Removing resources from an analytics server (see page 215)

20.2.1 Adding an analytics server

NOTE: Specific terminology is used when navigating the tree pane to add an analytics server. For help with this terminology, refer to Tree structure terminology (see page 4).

To add an analytics server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then select the **Analytics Servers** node.
3. Click the **Add** button and select the **Add audio analytics server** option from the drop down menu. The **Audio Analytics Server Wizard** opens at the **General Details** screen.
4. Enter the following details and where applicable use the text boxes provided:
   - **Label** - enter a name for the analytics server.

NOTE: The label **CANNOT** match any service label (name) within NICE Inform analytics or any existing data source name.

   - **Network address** - enter the hostname or IP address of the analytics server.
   - **Port** - enter the port used to connect to the analytics server. The range must be between 1024-65535.
   - **NICE Inform server** - the NICE Inform server used for audio retrieval. Click the drop down arrow and select the required NICE Inform server. In NICE Inform resilience conditions, if you have selected the master NICE Inform server and this configuration puts too much load on the server, you can select a standby NICE Inform server instead.
   - **NIAPI username** - click the drop down button and select the required username for the NICE Inform user used for audio retrieval via the NIAPI (NICE Inform Application Program Interface) from the list.

NOTE: Only user accounts that have the privilege to search and retrieve via the NIAPI are available for selection.

User accounts that have derived from an Active Directory domain are **NOT** supported.

– **NIAPI password** - enter the password for the NICE Inform user used for audio retrieval via the NICE Inform API.

NOTE: Ensure that there is no second password set for the NICE Inform user. Only accounts with one password are permitted.

– **Use analytics retention period** - check the box and set the analytics server retention period (days) that the analytics server keeps the text results for. This period is in relation to the start time of the call, not the time at which the call was processed. Entry is assisted by using the up/down arrows. After the number of days has elapsed, all of the analytics data is deleted.

5. Click the **Next** button to continue.

6. At the **Indexing Details** screen, enter the following information using the text boxes provided:

– **Label** - enter a name for the indexing server.

NOTE: The label **CANNOT** match any service label (name) within NICE Inform analytics or any existing data source name.

– **Network address** - enter the hostname or IP address of the indexing server.

– **Port** - enter the port used to connect to the indexing server. The range must be between 1024-65535.

7. Click the **Next** button to continue.

8. At the **Summary** screen, check that the details for the analytics and indexing servers are correct. Once satisfied, click the **Add** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

20.2.2 Editing an analytics server

NOTE: Specific terminology is used when navigating the tree pane to edit an analytics server. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To edit an analytics server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Audio Analytics** node and then expand the **Analytics Servers** node.

3. Select the **Analytics Server** node and click the **General** tab. The **General** page is presented.

4. Edit one or more of the following and where applicable use the text boxes provided:

– **Label** - the name for the analytics server.

NOTE: The label **CANNOT** match any service label (name) within NICE Inform analytics or any existing data source name.

- **Network address** - the hostname or IP address of the analytics server.
- **Port** - the port used to connect to the analytics server. The range must be between 1024-65535.
- **NICE Inform server** - the NICE Inform server used for audio retrieval. Click the drop down arrow and change the NICE Inform server. In NICE Inform resilience conditions, if you have selected the master NICE Inform server and this configuration puts too much load on the server, you can select a standby NICE Inform server instead.
- **NIAPI username** - the username for the NICE Inform user used for audio retrieval via the NIAPI (NICE Inform Application Program Interface). Click the drop down button and select the required username from the list.

NOTE: Only user accounts that have the privilege to search and retrieve via the NIAPI are available for selection.

User accounts that have derived from an Active Directory domain are **NOT** supported.

- **NIAPI password** - the password for the NICE Inform user used for audio retrieval via the NICE Inform API.
- **Use analytics retention period** - check the box and set the analytics server retention period (days) that the analytics server keeps the text results for. This period is in relation to the start time of the call, not the time at which the call was processed. Entry is assisted by using the up/down arrows. After the number of days has elapsed, all of the analytics data is deleted.

5. On completion, click the **Save** button.

20.2.3 Deleting an analytics server

NOTE: Specific terminology is used when navigating the tree pane to delete an analytics server. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To delete an analytics server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then expand the **Analytics Servers** node.
3. Select the **Analytics Server** node for deletion.
4. Click the **Delete analytics server** button. A confirmation message is presented confirming the deletion.

5. Click the **Yes** button.

20.2.4 Analytics categories

NOTE: Specific terminology is used when navigating the tree pane to configure your analytics categories. For help with this terminology, refer to Tree structure terminology (see page 4).

Use the categories page to create a category which consists of a group of related words and phrases. These are known as category matches. For example, a category of 'firearms' could have matches of 'gun', 'bullet' and 'shot'.

To configure analytics categories:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then expand the **Analytics Servers** node.
3. Select the **Analytics Server** node and click the **Categories** tab. The **Categories** page is presented.

The following analytics categories are displayed within the Categories table:

Table 20-1: Analytics categories table columns

Column	Description
i	The color configured for the category.
Label	The label (name) for the category.
Matches	A list of all the words and phrases for the category.

The following functions are available:

- Adding a category (see page 210)
- Editing a category (see page 211)
- Deleting a category (see page 212)

20.2.4.1 Adding a category

NOTE: Specific terminology is used when navigating the tree pane to add a category. For help with this terminology, refer to Tree structure terminology (see page 4).

To add a category:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then select the **Analytics Servers** node.

3. Click the **Categories** tab. The **Categories** page is presented.
4. Click the **Add** button and the **Add Category** dialog is presented.
5. Enter the following details:
   – **Label** - enter a label (name) for the category in the text box provided.

NOTE: The category label **MUST** be unique.

   – **Display color** - the color that is used for the detection for this category. The color is added to the **Audio analytics category detection** event icon that gets displayed on the *Timeline display* in *NICE Inform Reconstruction*. To add a color, click the **Browse** ... button, and within the **Color** dialog, select the required color and click the **OK** button.

NOTE: The category color **CANNOT** match the color of an existing category.

6. Click the **Add** button and the **Add Category Match** dialog is presented.

NOTE: There is also an **Edit** and a **Delete** button available to edit and delete matches. Refer to Editing a category (see page 211) for help editing a match. To delete a match, select the required match from the **Matches** list and click the **Delete** button.

7. Enter a word or phrase relating to the category in the text box provided. Phrases are added by inserting double quotation marks before and after the phrase e.g. "please help".

NOTE: It is recommended not adding the same word and phrase match across more than one category. This may cause unexpected search behaviors.

8. Click the **Add** button to add the category match. All matches are displayed in the **Matches** list.

NOTE: The **Add Category Match** dialog remains open to add further matches if required. Once finished, click the **Close** button to close the dialog.

9. On completion, click the **OK** button. The category is now added.

20.2.4.2 Editing a category

NOTE: Specific terminology is used when navigating the tree pane to edit a category. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To edit a category:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Audio Analytics** node and then select the **Analytics Servers** node.

3. Click the **Categories** tab. The **Categories** page is presented.

4. Click the **Edit** button and the **Edit Category** dialog is presented.

5. Edit one or more of the following:

   – **Label** - the label (name) for the category.

NOTE: The category label **MUST** be unique.

   – **Display color** - the color that is used for the detection for this category. The color is added to the **Audio analytics category detection** event icon that gets displayed on the *Timeline display* in *NICE Inform Reconstruction*. To edit a color, click the **Browse** ... button, and within the **Color** dialog, change the color and click the **OK** button.

NOTE: The category color **CANNOT** match the color of an existing category.

6. Select a word or phrase match for editing from within the **Matches** list and click the **Edit** button. The **Edit Category Match** dialog is presented.

NOTE: There is also an **Add** and a **Delete** button available. Refer to Adding a category (see page 210) and Deleting a category (see page 212) for help with these buttons.

7. Edit the word or phrase relating to the category in the text box provided. Phrases are added by inserting double quotation marks before and after the phrase e.g. "please help".

NOTE: It is recommended not adding the same word and phrase match across more than one category. This may cause unexpected search behaviors.

8. Click the **OK** button.

9. Repeat steps 6**-**8 to edit additional matches.

10. On completion, click the **OK** button. The category is now updated.

20.2.4.3 Deleting a category

NOTE: Specific terminology is used when navigating the tree pane to delete a category. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To delete a category:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Audio Analytics** node and then select the **Analytics Servers** node.

3. Click the **Categories** tab. The **Categories** page is presented.

4. Select the required category or a group of categories (using Microsoft Windows standard Shift and Ctrl methods) from the **Categories** table.

5. Click the **Delete** button. A message is presented confirming the deletion.

6. Click the **Yes** button.

The category is now deleted

20.2.5 Indexing server settings

NOTE: Specific terminology is used when navigating the tree pane to edit indexing server settings. For help with this terminology, refer to Tree structure terminology (see page 4).

- To edit the settings for the indexing server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Audio Analytics** node and then expand the **Analytics Servers** node.

3. Select the **Analytics Server** node and click the **Indexing** tab. The **Indexing** page is presented.

4. Edit one or more of the following using the text boxes provided:

   – **Label** - the name for the indexing server.

NOTE: The label **CANNOT** match any service label (name) within NICE Inform analytics or any existing data source name.

   – **Network address** - the hostname or IP address of the indexing server.

   – **Port** - the port used to connect to the indexing server. The range must be between 1024-65535.

5. On completion, click the **Save** button.

20.2.6 Adding resources to an analytics server

NOTE: Specific terminology is used when navigating the tree pane to add resources to an analytics server. For help with this terminology, refer to Tree structure terminology (see page 4).

- To add resources to an analytics server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then expand the **Analytics Servers** node.
3. Select the **Analytics Server** node and click the **Resources** tab. The **Resources** page is presented.
4. Click the **Add** button. The **Audio Analytics Resources Wizard** opens at the **Resource Selection** screen.
5. Select the resources to be added to the analytics server:
   a. Select either **Recording systems** or **Resource groups** from within the **Groups** tree.
   b. Select the resources to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

Only resources that the selected NIAPI (NICE Inform API) user is permitted to see are available for selection. It is therefore a prerequisite that the required resources are assigned to the NIAPI user before they can be added to the analytics server.

   c. On completion, click the **Next** button.
6. At the **Resource Language Selection** screen, do the following:
   a. Select the required resource from the table.
   b. Select the required language from the **Language** drop down list.

TIP: If you require setting multiple resources to the same language, select the required resources by using Microsoft Windows standard Shift and Ctrl methods.

   c. On completion, click the **Next** button.
7. At the **Summary** screen, check that the details relating to the resources you are adding to the analytics server are correct. Once satisfied, click the **Add** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

20.2.7 Editing analytics server resources

NOTE: Specific terminology is used when navigating the tree pane to edit an analytics server resource. For help with this terminology, refer to Tree structure terminology (see page 4).

▶ To edit an analytics server resource:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then expand the **Analytics Servers** node.
3. Select the **Analytics Server** node and click the **Resources** tab. The **Resources** page is presented.
4. Select the required resource or resources (using the Microsoft Windows standard Shift and Ctrl methods) and click the **Edit** button. The **Edit Audio Analytics Resource** dialog is presented.
5. Click the **Language** drop down arrow and change the language that the word discovery engine uses when converting audio to text for the selected resources.
6. On completion, click the **OK** button.

20.2.8 Removing resources from an analytics server

NOTE: Specific terminology is used when navigating the tree pane to remove resources from an analytics server. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To remove resources from an analytics server:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then expand the **Analytics Servers** node.
3. Select the **Analytics Server** node and click the **Resources** tab. The **Resources** page is presented.
4. Select the required resource or resources (using the Microsoft Windows standard Shift and Ctrl methods) and click the **Remove** button.

The resources are now removed from the analytics server.

20.2.9 Analytics servers details

NOTE: Specific terminology is used when navigating the tree pane to view analytics servers details. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To view the details of the analytics servers:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Audio Analytics** node and then expand the **Analytics Servers** node.

3. Select the **Analytics Server** node and click the **Servers** tab. The **Servers** page is presented.

The following analytics servers details are displayed within the table on **Servers** page:

NOTE: Apart from the column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 20-2: Analytics servers table columns

Column	Description
	An icon is displayed if there is an error connecting to the analytics server most likely due to a configuration issue.
Label	The label (name) for the analytics server.
Network address	The hostname or IP address of the analytics server.
Port	The network port used to connect to the analytics server.
Status	The analytics server status. The following status messages may be displayed: ▪ OK ▪ Login failed using the specified NICE Inform API user details ▪ Unable to connect to the Analytics Server ▪ Unable to connect to the Indexing Server ▪ Unable to connect to Word Discovery Engine ▪ The analytics configuration does not contain all of the required information ▪ The NICE Inform API user details specified are incomplete ▪ Invalid category information specified ▪ The Indexing Server details specified are incomplete ▪ The NICE Inform Server details specified are incomplete ▪ Invalid resource information specified ▪ Incomplete Word Discovery Engine details specified ▪ No resources have been specified ▪ No Word Discovery Engines specified ▪ Processing suspended due to insufficient disk space ▪ The NICE Inform API user does not have access to all specified resources

20.3 Analytics engines

NOTE: Specific terminology is used when navigating the tree pane to configure your Analytics engines. For help with this terminology, refer to Tree structure terminology (see page 4).

Word discovery engines are the only analytics engine type available for configuration.

Audio analytics is the process of identifying the words spoken in audio recordings. Once identified, those words can be searched for key words and phrases using NICE Inform Reconstruction.

- To configure available analytics engines:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then select the **Analytics Engines** node.

The following is available within the Analytics Engines section:

20.3.1 Adding a word discovery engine

NOTE: Specific terminology is used when navigating the tree pane to add a word discovery engine. For help with this terminology, refer to Tree structure terminology (see page 4).

- To add a word discovery engine:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then select the **Analytics Engines** node.
3. Click the **Add** button and select the **Add word discovery engine** option from the drop down menu. The **Word Discovery Engine Wizard** opens at the **General Details** screen.
4. Enter the following details and where applicable use the text boxes provided:
   - **Label** - enter a name for the word discovery engine.

NOTE: The label **CANNOT** match any service label (name) within NICE Inform analytics or any existing data source name.

   - **Network address** - enter the hostname or IP address of the word discovery engine.
   - **Port** - enter the port used to connect to the word discovery engine. The range must be between 1024-65535.
   - **Word discovery processors** - enter the number of processors to be used for identifying words and phrases on the word discovery engine. The maximum number of processors is limited by the value in your NICE Inform license. Should you try and exceed this value, a message is displayed informing you that you

have exceeded the permitted value. Entry is assisted by using the up/down arrows.

- **Language** - the language that the word discovery engine uses when converting audio to text. Click the drop down arrow and select the required language.

5. Click the **Next** button to continue.
6. At the **Summary** screen, check that the details relating to the word discovery engine are correct. Once satisfied, click the **Add** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

20.3.2 Editing a word discovery engine

NOTE: Specific terminology is used when navigating the tree pane to edit a word discovery engine. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To edit a word discovery engine:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then expand the **Analytics Engines** node.
3. Select the required **Word Discovery Engine** node.
4. Click the **General** tab and the **General** page is presented.
5. Edit one or more of the following and where applicable use the text boxes provided:
   - **Label** - the name for the word discovery engine.

NOTE: The label **CANNOT** match any service label (name) within NICE Inform analytics or any existing data source name.

   - **Network address** - the hostname or IP address of the word discovery engine.
   - **Port** - the port used to connect to the word discovery engine. The range must be between 1024-65535.
   - **Word discovery processors** - the number of processors to be used for identifying words and phrases on the word discovery engine. The maximum number of processors is limited by the value in your NICE Inform license. Should you try and exceed this value, a message is displayed informing you that you have exceeded the permitted value. Entry is assisted by using the up/down arrows.
6. On completion, click the **Save** button.

20.3.3 Deleting a word discovery engine

NOTE: Specific terminology is used when navigating the tree pane to delete a word discovery engine. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a word discovery engine:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then expand the **Analytics Engines** node.
3. Select the required **Word Discovery Engine** node for deletion.
4. In the button bar, click the **Delete word discovery engine** button. A confirmation message is presented confirming the deletion.
5. Click the **Yes** button.

The word discovery engine is removed from the tree pane.

20.3.4 Word discovery engine settings

NOTE: Specific terminology is used when navigating the tree pane to edit the settings for a word discovery engine. For help with this terminology, refer to Tree structure terminology (see page 4).

To edit the settings for a word discovery engine:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then expand the **Analytics Engines** node.
3. Select the required **Word Discovery Engine** node.
4. Click the **Settings** tab and the **Settings** page is presented.
5. Edit the following setting:
   - **Language** - the language that the word discovery engines uses when converting audio to text. Click the drop down arrow and change to the required language.
6. On completion, click the **Save** button.

20.3.5 Analytics engines details

NOTE: Specific terminology is used when navigating the tree pane to view analytics engines details. For help with this terminology, refer to Tree structure terminology (see page 4).

To view the details of analytics engines:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Audio Analytics** node and then select the **Analytics Engines** node. The **Servers** page is presented.

The following analytics engines details are displayed within the table on **Servers** page:

NOTE: Apart from the column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 20-3: Analytics engines table columns

Column	Description
	An icon is displayed if there is an error connecting to the analytics engine which is most likely due to a configuration issue.
Label	The label (name) for the analytics engine.
Network address	The hostname or IP address of the analytics engine.
Port	The network port used to connect to the analytics engine.
Language	The language that the analytics engine (word discovery engine) uses when converting audio to text.
Status	The analytics engine status. The following status messages may be displayed: ▪ OK ▪ Unable to connect to Word Discovery Engine

21 Applications

NOTE: Specific terminology is used when navigating the tree pane to configure applications. For help with this terminology, refer to Tree structure terminology (see page 4).

In order to configure applications, you **MUST** have the **Configure application settings** privilege assigned to you by a NICE Inform Administrator.

Use the Application section to configure application system wide settings for a particular NICE Inform application.

▸ To configure applications:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Applications** node and then select the required application node (e.g. Organizer).

The following NICE Inform application is available:

- Evaluator (see page 221)
- Organizer (see page 224)
- Reconstruction (see page 232)

21.1 Evaluator

NOTE: Specific terminology is used when navigating the tree pane to configure the system wide settings for the NICE Inform Evaluator application. For help with this terminology, refer to Tree structure terminology (see page 4).

Available system wide settings for the Evaluator application are provided within the Evaluator section.

▸ To configure the system wide settings for the NICE Inform Evaluator application:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Applications** node and then select the **Evaluator** application node .
3. Select one of the following tabbed pages:
   - General page (see page 222) - use this page to configure evaluation schedule settings.
   - Metadata page (see page 223) - use this page to select up to 5 CAD metadata fields which are displayed alongside CAD evaluations.

21.1.1 General page

NOTE: Specific terminology is used when navigating the tree pane to configure the system wide settings for the NICE Inform Evaluator general settings. For help with this terminology, refer to Tree structure terminology (see page 4).

The General page is provided for you to configure specific evaluation schedule settings.

- To configure evaluation schedule settings for the NICE Inform Evaluator application:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Applications** node and then select the **Evaluator** application node .
3. Click the **General** tab and the **General** page is presented.
4. Within the **Evaluation Schedule** section, the following settings are provided:
   - **Schedule run time** - enables you to specify the time of day (in local time) evaluation schedules are run to generate evaluations. By default the time is set to midnight UTC time. To change, enter the new time in the provided text boxes. Time entry is assisted by either selecting the hours, minutes or seconds and then using the up/down arrows.

NOTE: Daylight saving is ignored when setting the schedule run time.

   - **Maximum search duration in days** - the maximum number of days from the current day that the evaluation schedule will search back for calls and CAD incidents. To change, enter the number of days in text box. Entry is assisted using the up/down arrows.
5. Within the **Operator Shifts** section, you can configure the different shifts that operators work (NICE Inform users). These shifts are available to select when *Adding a new user to the system* and when editing a NICE inform user within the *Inform User page* in *NICE Inform User Administration* and, they can then be assigned to an evaluation within the *Evaluation panel* in *NICE Inform Evaluator* for operators that have been assigned to a shift. The following features are provided to configure shifts:
   - **Adding a shift** - enter the name for the shift in the text box provided and click the **Add** button. The new shift is added to the list of shifts.
   - **Editing a shift** - select the shift in the list and click the **Edit** button. Edit the name for the shift in the text box provided.
   - **Deleting a shift** - select the shift in the list and click the **Delete** button. The shift is removed from the list.

NOTE: All available shifts are displayed on the Metadata page (see page 223) where you can enable/disable shifts so that they are available/unavailable for selection when adding or editing a user or when updating an evaluation.

6. Click the **Save** button.

21.1.2 Metadata page

NOTE: Specific terminology is used when navigating the tree pane to configure the system wide settings for the NICE Inform Evaluator metadata settings. For help with this terminology, refer to Tree structure terminology (see page 4).

You can use the Metadata page for the following:

– To select up to 5 CAD metadata fields which are displayed alongside CAD evaluations

– To enable which shifts operators are working that are being evaluated.

To configure metadata settings for the NICE Inform Evaluator application:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Applications** node and then select the **Evaluator** application node .
3. Click the **Metadata** tab and the **Metadata** page is presented.
4. For shift metadata fields skip to step 8 and for CAD metadata fields, click the **Browse** ... button alongside a meta data field and at the **CAD Field Selection** dialog, select the required CAD meta data field using standard selection methods.

NOTE: Refer to Adding and removing items on how to add or remove selected items.

The top metadata CAD field is a commonly used field (Time to Enter) is auto populated and read-only.

5. Check the **Update metadata name** box if you require auto populating this metadata name as the **Name** for this field. Leave the box unchecked and you can enter a name later.
6. Click the **OK** button upon completion.
7. Repeat steps 4-6 to add additional CAD metadata fields.
8. Check the **Enabled** box for each metadata field that you want to be made available to NICE Inform Evaluator and also for User Administration (for shift metadata fields).
9. Click the **Save** button.

Once metadata fields are enabled, the following applies:

- For **CAD** metadata fields, new CAD evaluations will now show these metadata fields in the *Evaluations list* and *Evaluation panel* within *NICE Inform Evaluator*.
- For **Shift** metadata fields, they are now available for selection when *Adding a new user to the system* and when editing a NICE inform user within the *Inform User page*

in *NICE Inform User Administration*. These shifts can then be assigned to an evaluation within the *Evaluation panel* in *NICE Inform Evaluator* for operators that have been assigned to a shift.

21.2 Organizer

NOTE: Specific terminology is used when navigating the tree pane to configure the system wide settings for the NICE Inform Organizer application. For help with this terminology, refer to Tree structure terminology (see page 4).

Available system wide settings for the Organizer application are provided on the Organizer page.

To configure the system wide settings for the NICE Inform Organizer application:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Applications** node and then select the **Organizer** application node. The **General** page is presented.
3. The following section is provided:

Incident Properties

Incident properties are used to store additional information within an incident e.g. a police officer ID or a case ID.

The following functions are available:

- Adding an incident property (see page 225)
- Editing an incident property (see page 228)
- Deleting an incident property (see page 231)

List order controls

Use the list order controls to configure the order that the incident properties are displayed in the **Incident Properties** table. They are also displayed in this order when creating a new incident (refer to *Creating a new incident*, *Adding Reconstruction Content to a new incident, Copying Reconstruction Content to a new incident*, and *Copying Related Material to a new incident* in *NICE Inform Organizer*).

Table 21-1: List order controls

Button	Description
	Moves the highlighted property to the top of the table.
	Moves the highlighted property up one place in the table.
	Moves the highlighted property down one place in the table.
	Moves the highlighted property to the end of the table.

21.2.1 Adding an incident property

NOTE: Specific terminology is used when navigating the tree pane to add an incident property. For help with this terminology, refer to Tree structure terminology (see page 4).

To add an incident property:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Applications** node and then select the **Organizer** application node. The **General** page is presented.
3. Click the **Add** button and the **Add Property** dialog is presented.
4. Enter the following details and where applicable use the text boxes provided.
   - **Name** - enter a name for the incident property.

NOTE: The incident property name **MUST** be unique.

   - **Type** - click the down arrow and select the required incident property type (Text, Numeric or List).
   - **Set as mandatory when creating an incident** - check the box if you require this to be a mandatory incident property. Once set as mandatory, a value has to be entered for this incident property when creating a new incident (refer to *Creating a new incident*, *Adding Reconstruction Content to a new incident, Copying Reconstruction Content to a new incident*, and *Copying Related Material to a new incident* in *NICE Inform Organizer*).
5. The subsequent options differ depending on what you have selected for the incident property type. Select one of the following that matches which incident property type you are adding:
   - Adding a text incident property type (see page 225)
   - Adding a numeric incident property type (see page 226)
   - Adding an incident property list option (see page 227)

21.2.1.1 Adding a text incident property type

For help with the initial steps creating your incident property, refer to Adding an incident property (see page 225).

To add a text incident property type:

1. Check the **Enable text validation** box to enable the **Text format** and **Prompt** text boxes below for you to create a new text format.

NOTE: Leave the box unchecked and any text can be entered for this incident property.

2. Within the **Text format** text box, enter the required format for the text incident property type using a simple syntax:

   – 'A' - any uppercase letter
   – 'a' - any lowercase letter
   – '0' - any digit (0 to 9)
   – '-' - any non-alphanumeric character
   – ' ' - a space
   – '.' - any character

NOTE: For example, entering a syntax of AAA-000-aaa may have an entry of ABC-123-abc.

3. Within the **Prompt text** box, enter guidance for the syntax for this incident property. This guidance is provided in the **Value** field when creating the incident to assist you when entering the text in the correct format.
4. On completion, click the **OK** button and the new text incident property type is added to the **Incident Properties** list.
5. Click the **Save** button.

21.2.1.2 Adding a numeric incident property type

For help with the initial steps creating your incident property, refer to Adding an incident property (see page 225).

To add a numeric incident property type:

1. Check the **Enable numeric validation** box to enable the Minimum and Maximum value boxes below for you to create a new numeric incident property type.

NOTE: Leave the **Enable numeric validation** box unchecked and any numeric value can be entered for this incident property.

2. Configure the following numeric values:

   – **Minimum value** - enter a minimum value in the text box provided. Entry is assisted by clicking the up/down arrows.
   – **Maximum value** - enter a maximum value in the text box provided. Entry is assisted by clicking the up/down arrows.

NOTE: Once you have set the minimum and maximum range, you can only enter a number within these values when adding the numeric incident property when creating an incident.

3. On completion, click the **OK** button and the new numeric incident property type is added to the **Incident Properties** list.
4. Click the **Save** button.

21.2.1.3 Adding an incident property list option

For help with the initial steps creating your incident property, refer to Adding an incident property (see page 225).

Within the **Options** section, you can add, edit, delete and reorder the property list options. This section is **ONLY** available if you have set the **Type** option to **List**.

NOTE: Once the property list options have been configured, they are used for selection for this incident property when the incident is created in NICE Inform Organizer.

To add, edit, delete and reorder an incident property list option:

1. To add a property list option:

   a. Check the **Use to calculate incident retention period** box if you require this incident property list option to trigger retention for this incident. This over rides incident retention as configured within the **Incident Storage** page (refer to Managing incident and evaluation storage for file sharing (see page 181)). You configure the retention period after clicking the **Add property option** button.

NOTE: If this setting has already been enabled for another incident property, this checkbox is unchecked and disabled. Only one incident property can be configured this way.

   b. Click the **Add property option** button and the **Add Property Option** dialog is presented.
   c. Enter a name for the property list option in the text box provided.
   d. If you have checked the **Use to calculate incident retention period** box, extra options are available which you **MUST** configure:

      (1) Check the **Enable incident retention** box.
      (2) At the **Available for deletion after** option, using the up/down arrows, set the number of units and then click the down arrow and select either Days, Months or Years.

NOTE: All incidents that are created from now on **CANNOT** be deleted before the number of days has elapsed. All incidents created prior to enabling this feature can be deleted but if you wish to set incident retention these settings apply. They also automatically have incident retention enabled and their minimum availability for deletion set.

   e. On completion, click the **Add** button to add the property option.

NOTE: The **Add Property Option** dialog remains open to enable you to add further property options if required. Once finished, click the **Close** button to close the dialog. You can add a maximum of 50 property options.

2. To edit a property option:

   a. Check the **Use to calculate incident retention period** box if you require this incident property list option to trigger retention for this incident. This over rides incident retention as configured within the **Incident Storage** page (refer to

Managing incident and evaluation storage for file sharing (see page 181)). You configure the retention period after clicking the **Edit property** button.

b. Either select a property option from the **Options** list and double click or click the **Edit property** button. The **Edit Property Option** dialog is presented.
c. Edit the name for the property option in the text box provided.
d. If you have checked the **Use to calculate incident retention period** box or if this incident property option has incident retention configured, there are further options:
    (1) Check the **Enable incident retention** box.
    (2) At the **Available for deletion after** option, using the up/down arrows, set the number of units and then click the down arrow and select either Days, Months or Years.

NOTE: All incidents that are created from now on **CANNOT** be deleted before the number of days has elapsed. All incidents created prior to enabling this feature can be deleted but if you wish to set incident retention these settings apply. They also automatically have incident retention enabled and their minimum availability for deletion set.

e. On completion, click the **OK** button.

3. To delete a property option:
    a. Select a property option from the **Options** list.
    b. Click the **Delete property** button.
4. To reorder a property option:
    a. Select the property option from the list.
    b. Use either the **Move up** button or the **Move down** button until the property option is in the correct position in the list.
5. On completion, click the **OK** button and the incident property list option is added to the **Incident Properties** list.
6. Click the **Save** button.

21.2.2 Editing an incident property

NOTE: Specific terminology is used when navigating the tree pane to edit an incident property. For help with this terminology, refer to Tree structure terminology (see page 4).

- To edit an incident property:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Applications** node and then select the **Organizer** application node. The **General** page is presented.

3. Select the required incident property from the **Incident Property** table and click the **Edit** button. The **Edit Property** dialog is presented.

4. Edit one or more of the following and where applicable use the text boxes provided:

   – **Name** - the name for the incident property.

NOTE: The incident property name **MUST** be unique.

   – **Type** - the incident property type. To change, click the down arrow and change the incident property type (Text, Numeric or List).

   – **Set as mandatory when creating an incident** - check the box if you require this to be a mandatory incident property. Once set as mandatory, a value has to be entered for this incident property when creating a new incident (refer to *Creating a new incident*, *Adding Reconstruction Content to a new incident, Copying Reconstruction Content to a new incident*, and *Copying Related Material to a new incident* in *NICE Inform Organizer*).

5. The subsequent options differ depending on what you have selected for the incident property type. Select one of the following that matches which incident property type you are editing:

   – Editing a text incident property type (see page 229)

   – Editing a numeric incident property type (see page 230)

   – Editing an incident property list option (see page 230)

21.2.2.1 Editing a text incident property type

For help with the initial steps when editing your incident property, refer to Editing an incident property (see page 228).

▸ To edit a text incident property type:

1. If this text incident property type has a syntax text format already configured, the **Enable text validation** box is enabled and the **Text format** and **Prompt** text boxes below are also enabled. If not and you require creating a syntax text format, check the box.

NOTE: Leave the box unchecked and any text can be entered for this incident property.

2. Within the **Text format** text box, edit the required format for the text incident property type using a simple syntax:

   – ‘A’ - any uppercase letter

   – ‘a’ - any lowercase letter

   – ‘0’ - any digit (0 to 9)

   – ‘-’ - any non-alphanumeric character

   – ‘ ‘ - a space

   – ‘.’ - any character

NOTE: For example, entering a syntax of AAA-000-aaa may have an entry of ABC-123-abc.

3. Within the **Prompt text** box, edit the guidance for the syntax for this incident property. This guidance is provided in the **Value** field when creating the incident to assist you when entering the text in the correct format.
4. On completion, click the **OK** button and the changes to the text incident property type are updated.
5. Click the **Save** button.

21.2.2.2 Editing a numeric incident property type

For help with the initial steps when editing your incident property, refer to Editing an incident property (see page 228).

- To edit a numeric incident property type:

1. If this numeric incident property type has minimum and maximum values already configured, the **Enable numeric validation** box is enabled and the **Minimum value** and **Maximum value** text boxes below are also enabled. If not and you require creating new values, check the box.

NOTE: Leave the **Enable numeric validation** box unchecked and any numeric value can be entered for this incident property.

2. Edit the following numeric values where required:
   - **Minimum value -** edit the minimum value in the text box provided. Entry is assisted by clicking the up/down arrows.
   - **Maximum value** - edit the maximum value in the text box provided. Entry is assisted by clicking the up/down arrows.

NOTE: Once you edited the minimum and maximum range, you can only enter a number within these values when adding the numeric incident property when creating an incident.

3. On completion, click the **OK** button and the changes to the numeric incident property type are updated.
4. Click the **Save** button.

21.2.2.3 Editing an incident property list option

For help with the initial steps when editing your incident property, refer to Editing an incident property (see page 228).

Within the **Options** section, you can edit, add, delete and reorder the property list options. This section is **ONLY** available if the **Type** option has been set to **List**.

NOTE: Once the property list options have been configured, they are used for selection for this incident property when the incident is created in NICE Inform Organizer.

- To edit, add, delete and reorder a property list option:

1. To edit a property list option:
   a. Either select a property option from the **Options** list and double click or click the **Edit property** button. The **Edit Property Option** dialog is presented.
   b. Edit the name for the property option in the text box provided.
   c. On completion, click the **OK** button.
2. To add a property list option:
   a. Click the **Add property option** button and the **Add Property Option** dialog is presented.
   b. Enter a name for the property list option in the text box provided.
   c. On completion, click the **Add** button to add the property option.

NOTE: The **Add Property Option** dialog remains open to enable you to add further property options if required. Once finished, click the **Close** button to close the dialog. You can add a maximum of 50 property options.

3. To delete a property option:
   a. Select a property option from the **Options** list.
   b. Click the **Delete property** button.
4. To reorder a property option:
   a. Select the property option from the list.
   b. Use either the **Move up** button or the **Move down** button until the property option is in the correct position in the list.
5. On completion, click the **OK** button and the changes to the incident property list option are updated.
6. Click the **Save** button.

21.2.3 Deleting an incident property

NOTE: Specific terminology is used when navigating the tree pane to delete an incident property. For help with this terminology, refer to Tree structure terminology (see page 4).

- To delete an incident property:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Applications** node and then select the **Organizer** application node. The **General** page is presented.

3. Select the required incident property for deletion from the **Incident Property** table.

4. Click the **Delete** button. A message is presented confirming the deletion.

5. Click the **Yes** button followed by the **Save** button.

The incident property is now deleted.

NOTE: Incident properties are **NOT** deleted from existing incidents. They become independent and are only associated to individual incidents.

21.3 Reconstruction

NOTE: Specific terminology is used when navigating the tree pane to configure the system wide settings for the NICE Inform Reconstruction application. For help with this terminology, refer to Tree structure terminology (see page 4).

Available system wide settings for the Reconstruction application are provided on the Reconstruction page.

- To configure the system wide settings for the NICE Inform Reconstruction application:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Applications** node and then select the **Reconstruction** application node. The **General** page is presented.

3. The following option is provided:

   – **Export header for PDF -** enter a PDF header in the text box provided which, when saving text conversations (refer to *Save Text* in *NICE Inform Reconstruction*), this header will be included in the PDF file.

4. Click the **Save** button.

22 Workstations

NOTE: Specific terminology is used when navigating the tree pane to configure workstations. For help with this terminology, refer to Tree structure terminology (see page 4).

Workstations can be added to the system and configured where necessary.

Workstations can then be assigned to users and assigned to positions in order to manage NICE Inform user access.

- To configure workstations:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Workstations** node.
3. Select the **Workstations** tab. The **Workstations** page is presented.

The following functions are available:

- Adding a workstation (see page 233)
- Editing a workstation (see page 234)
- Deleting a workstation (see page 235)
- Assigning a replay device to a workstation (see page 236)
- Removing a replay device from a workstation (see page 236)

22.1 Adding a workstation

NOTE: Specific terminology is used when navigating the tree pane to add a workstation. For help with this terminology, refer to Tree structure terminology (see page 4).

- To add a new workstation to be used to connect to NICE Inform or used in a position:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Workstations** node.
3. Select the **Workstations** tab. The **Workstations** page is presented.
4. Click the **Add** button and the **Add Workstation** dialog is presented.
5. Enter the following details in the text boxes provided:
   - **Workstation hostname** - the workstation hostname.
   - **Description** - a description (optional) for the workstation. This could be the name of the user who connects to NICE Inform using this workstation.

6. Click the **Add** button to add the new workstation. The new workstation is now located within the **Workstations** table.

7. The **Add Workstation** screen remains open to allow you to continue adding more workstations. To exit this screen, click the **Close** button.

8. Click the **Save** button.

22.2 Editing a workstation

NOTE: Specific terminology is used when navigating the tree pane to edit a workstation. For help with this terminology, refer to Tree structure terminology (see page 4).

- To edit workstation details:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Select the **Workstations** node.

3. Select the **Workstations** tab. The **Workstations** page is presented.

4. Within the **Workstations** table, do one of the following:

   – Double-click the required workstation hostname.

   – Select the required workstation hostname and click the **Edit** button.

NOTE: In both cases, the **Edit Workstation** dialog is presented.

5. Edit the existing entries as required in the text boxes provided:

   – **Workstation hostname** - edit the hostname for the workstation.

   – **Description** - edit the description for the workstation.

6. On completion, click the **OK** button.

NOTE: You can edit the description of multiple workstations at the same time. Select the required workstations using Microsoft Windows standard Shift and Ctrl methods and click the **Edit** button. Change the description and all the selected workstations are updated with the same description.

You **CANNOT** edit multiple workstation hostnames at the same time.

7. Click the **Save** button.

22.3 Workstation settings

NOTE: Specific terminology is used when navigating the tree pane to edit workstation settings. For help with this terminology, refer to Tree structure terminology (see page 4).

- To change the settings for the configured workstations:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Workstations** node.
3. Click the **Settings** tab and the **Settings** page is presented.
4. The following setting is available:
   - **Auto learn workstations -** when checked the system automatically learns workstations once a new workstation is used to access NICE Inform.
5. On completion, click the **Save** button.

NOTE: By default, the **Automatically learn workstations** feature is enabled.

22.4 Deleting a workstation

NOTE: Specific terminology is used when navigating the tree pane to delete a workstation. For help with this terminology, refer to Tree structure terminology (see page 4).

- To delete a workstation:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Workstations** node.
3. Select the **Workstations** tab. The **Workstations** page is presented.
4. Select the required workstation or a group of workstations (using Microsoft Windows standard Shift and Ctrl methods) from the **Workstations** table.
5. Click the **Delete** button. A message is presented confirming the deletion. Click the **Yes** button followed by the **Save** button

NOTE: A user who does not have full workstation access may be prevented from being able to access NICE Inform again if an assigned workstation has been deleted. For help identifying whether a user has full workstation access or not, you need to check the **Allowed Workstations** section within the **Inform User** page (refer to *Editing user details* in *NICE Inform User Administration*).

6. Click the **Yes** button followed by the **Save** button.

The workstation is now deleted.

22.5 Assigning a replay device to a workstation

NOTE: Specific terminology is used when navigating the tree pane to assign a replay device to a workstation. For help with this terminology, refer to Tree structure terminology (see page 4).

You can **ONLY** assign one CryptR replay device to a workstation.

To assign a replay device to a workstation:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Workstations** node.
3. Select the **Workstations** tab. The **Workstations** page is presented.
4. Select the required workstation from the **Workstations** table to assign the replay device to.
5. Within the **Assigned replay devices** section, click the **Assign** button. The **Assign Replay Devices** dialog is presented.
6. Select the replay device to assign to the workstation and click the **OK** button.
7. Click the **Save** button.

NOTE: In order to use the replay device, you **MUST** first log out and then log back into NICE Inform.

22.6 Removing a replay device from a workstation

NOTE: Specific terminology is used when navigating the tree pane to remove a replay device from a workstation. For help with this terminology, refer to Tree structure terminology (see page 4).

To remove a replay device from a workstation:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Select the **Workstations** node.
3. Select the **Workstations** tab. The **Workstations** page is presented.
4. Select the required replay device from the **Assigned replay devices** table.
5. Click the **Remove** button followed by the **Save** button.

The replay device is now removed from the workstation.

23 Positions

NOTE: Specific terminology is used when navigating the tree pane to configure positions. For help with this terminology, refer to Tree structure terminology (see page 4).

A position is representative of one or more workstations and their relationship with resources.

All positions are displayed within the System Administration tree pane and are hierarchical which means any resources added to the child position node are visible to its parent node.

The following functions are available:

- Adding a position (see page 238)
- Editing a position (see page 239)
- Moving a position (see page 240)
- Assigning workstations to a position (see page 241)
- Removing a workstation from a position (see page 241)
- Assigning resources to a position (see page 242)
- Removing resources from a position (see page 242)
- Deleting a position (see page 240)

23.1 Adding a position

NOTE: Specific terminology is used when navigating the tree pane to add a position. For help with this terminology, refer to Tree structure terminology (see page 4).

▶ To add a new position:

1. Do one of the following:
   - Select the **Position** node in the tree (if the new position is to be a child of this node).
   - Expand the **Position** node in the tree and select the required position node (if this new position is to be the child of this node).
2. Click the **Add** button and select the **Add Position** option from the drop down menu.
3. The **New Position Wizard** opens at the **Welcome** screen. Click the **Next** button to continue.
4. At the **Position Name** and **Description** screen.
   a. Enter the name of the **Position** (mandatory).
   b. Enter a **Description** (optional).
   c. On completion, click the **Next** button.
5. At the **Assign Resources** screen, select the resources to be added to the position:

a. Select either **Recording systems** or **Resource groups** from within the **Groups** tree.
b. Select the resources to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

c. On completion, click the **Next** button.

NOTE: Assigning resources is optional. You can assign resources after you have created the position (refer to Assigning resources to a position (see page 242)).

6. At the **Assign Workstations** screen, do one of the following:

   – Enter the **Hostname** for the workstation and a **Description** (optional) in the associated text boxes. Then click the **Add New** button and the new workstation is added to the **Selected workstations** list.

NOTE: All workstations are available for selection in the **Available workstations** list. Workstations can be added to the **Selected workstations** list and back again using the normal selection methods.

   – Select the required workstation from the **Available workstations** list and add them to the **Selected workstations** list using the normal selection methods.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected workstations from the list.

You can **ONLY** assign workstations to one position. If you attempt to assign workstations that have already been assigned to another position, you are presented with a message informing you of the workstations that cannot be assigned and the position that they are in. Click the **OK** button to the message and those workstations are removed from the **Selected workstations** list.

Assigning workstations is optional. You can assign workstations after you have created the position (refer to Assigning workstations to a position (see page 241)).

7. Click the **Next** button to continue and the **Summary** screen is presented. Check that the new position details are correct. Once satisfied, click the **Finish** button. If any of the information within the Summary screen is incorrect, click the **Back** button to make any changes.

23.2 Editing a position

NOTE: Specific terminology is used when navigating the tree pane to edit a position. For help with this terminology, refer to Tree structure terminology (see page 4).

▸ To edit the details of a position:

1. In the tree pane, expand the **Positions** node and select the required **Position** node.
2. Click the **General** tab and the **General** page is presented.
3. Edit one or more of the following using the text boxes provided:
   - **Name -** the name for position.
   - **Description -** the description for the position.
4. On completion, click the **Save** button.

23.3 Moving a position

NOTE: Specific terminology is used when navigating the tree pane to move a position. For help with this terminology, refer to Tree structure terminology (see page 4).

To move a position and all its child nodes:

1. In the tree pane, expand the **Positions** node and select the required **Position** node to be moved.
2. Click the **Move Position** button.
3. The **Move Position** dialog is presented displaying the tree structure of the positions that you have the privilege to view.
4. Select a position as the new location for the position you wish to move and click the **OK** button. The position and any sub-positions are moved to the new location.

23.4 Deleting a position

NOTE: Specific terminology is used when navigating the tree pane to delete a position. For help with this terminology, refer to Tree structure terminology (see page 4).

To delete a position:

1. In the tree pane, expand the **Positions** node and select the required **Position** node for deletion.
2. Click the **Delete position** button. A message is presented confirming the deletion.
3. Click the **Yes** button.

The position is now deleted.

23.5 Assigning workstations to a position

NOTE: Specific terminology is used when navigating the tree pane to assign workstations to a position. For help with this terminology, refer to Tree structure terminology (see page 4).

To assign workstations to a position:

1. In the tree pane, expand the **Positions** node and select the required **Position** node.
2. Click the **Workstations** tab and the **Workstations** page is presented.
3. Click the **Assign** button and the **Assign Workstations** dialog is presented.
4. Do one of the following:
   - Enter the **Hostname** for a new workstation and a **Description** (optional) in the associated text boxes. Then click the **Add New** button and the new workstation is created and added to the **Selected workstations** list.

NOTE: All workstations are available for selection in the **Available workstations** list. Workstations can be added to the **Selected workstations** list and back again.

   - Select the required workstation from the **Available workstations** list and add them to the **Selected Workstations** list.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected workstations from the list.

You can **ONLY** assign workstations to one position. If you attempt to assign workstations that have already been assigned to another position, you are presented with a message informing you of the workstations that cannot be assigned. Click the **OK** button to the message and those workstations are removed from the **Selected workstations** list.

Any workstations that have already been assigned to the position are already displayed in the **Selected workstations** list. You can move them back to the **Available workstations** list which removes them from the **Workstations** table in the **Workstations** page.

5. On completion, click the **OK** button and the workstations are assigned to the position.

23.6 Removing a workstation from a position

NOTE: Specific terminology is used when navigating the tree pane to remove workstations from a position. For help with this terminology, refer to Tree structure terminology (see page 4).

To remove a workstation (or workstations) from a position:

1. In the tree pane, expand the **Positions** node and select the required **Position** node.
2. Click the **Workstations** tab and the **Workstations** page is presented.
3. Select the required workstation or workstations (using Microsoft Windows standard Shift and Ctrl methods) from the **Workstations** table.
4. Click the **Remove** button. A message is presented confirming the deletion.
5. Click the **Yes** button.

The workstation is now removed from the position.

23.7 Assigning resources to a position

NOTE: Specific terminology is used when navigating the tree pane to assign resources to a position. For help with this terminology, refer to Tree structure terminology (see page 4).

- To assign resources to a position:

1. In the tree pane, expand the **Positions** node and select the required **Position** node.
2. Click the **Resources** tab and the **Resources** page is presented.
3. Click the **Assign** button and the **Assign Resources** dialog is presented.
4. Do one of the following:
   - Click the **Recording systems** radio button to assign resources from a data source. Select the required resources.
   - Click the **Resource groups** radio button to assign resources from a resource group or resources from within a group. To add resources from within a resource group, select the individual resource group from the **Groups** tree and then select the resources you wish to add.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected resources from the list.

5. On completion, click the **OK** button and the resources are assigned to the position.

23.8 Removing resources from a position

NOTE: Specific terminology is used when navigating the tree pane to remove resources from a position. For help with this terminology, refer to Tree structure terminology (see page 4).

- To remove resources from a position:

1. In the tree pane, expand the **Positions** node and select the required **Position** node for removal.
2. Click the **Resources** tab and the **Resources** page is presented.
3. Select the required resource or resources (using Microsoft Windows standard Shift and Ctrl methods) within the **Resources** table.
4. Click the **Remove** button. A message is presented confirming the removal.
5. Click the **Yes** button.

The resources are now removed from the position.

24 Notifications

NOTE: Specific terminology is used when navigating the tree pane to configure Notifications. For help with this terminology, refer to Tree structure terminology (see page 4).

Use the Notifications section to configure notification settings for NICE Inform Evaluator. Here you can customize when notifications are sent and what actions performed in NICE Inform Evaluator will trigger a notification. Once done, you can then configure the email settings for each user that is required to receive these notifications (refer to Email notifications (see page 245)).

- To configure notifications:

1. In the tree pane, select the **Notifications** node.
2. Within the **Batching** section, do one of the following:
   - Check the **Group notifications into batches** box. This groups all of your notifications together and sends one consolidated email per user per day. The **Dispatch notification at** option is enabled for you to select the time every day that the notification batch is sent. Enter the hours, minutes and seconds in the text box. Time entry is assisted by using the up/down arrows.
   - Uncheck the **Group notifications into batches** box. Each individual notification generated by NICE Inform is delivered separately to the user as they occur.
3. Within the **Routing** section, you can customize which notifications will be delivered (checking the associated notification box) and which will be discarded (unchecking the notification box) for all users. The following notifications are provided:
   - **Notify when evaluation assignment is set, or modified**
   - **Notify when review of evaluations is requested**
   - **Notify when reconsideration of evaluations is requested**
   - **Notify when a scheduled evaluation cannot be created due to a lack of calls**
   - **Notify when a schedules evaluation cannot be created due to an lack of operator resources**

NOTE: For more information as to what is included within the email notifications as detailed in the Routing section, refer to Email notification content (see page 247).

For more information regarding progressing an evaluation and the different evaluation states, refer to *Progressing an evaluation* within *NICE Inform Evaluator*.

4. On completion, click the **Save** button.

24.1 Email notifications

NOTE: Specific terminology is used when navigating the tree pane to configure email notifications. For help with this terminology, refer to Tree structure terminology (see page 4).

Use the Email notifications section to configure the email settings for all recipients that are required to receive NICE Inform Evaluator notifications which are configured within the Notifications (see page 244) page. The use of two separate mechanisms may be used for the transmission of email notifications:

– Microsoft Exchange Web Services (EWS)
– Simple Mail Transfer Protocol (SMTP)

To configure email notifications:

1. In the tree pane, expand the **Notifications** node and select the **Email notifications** node.
2. At the **Delivery Mechanism** section, select one of the following mechanisms to be used for the transmission of email notifications:

   – Exchange Web Services (EWS)

   a. To configure the Microsoft Exchange Server settings for email notifications, enter the Microsoft Exchange Web Server (EWS) address in the Web Service Address text box.
   b. Click the **Discover** button to attempt auto discovery of the Microsoft EWS address.

   – Simple Mail Transfer Protocol (SMTP)

   a. To configure the Simple Mail Transfer Protocol (SMTP) settings for email notifications, within the **Credentials** section, do one of the following:
      - Check the **Use Custom Credentials** box and enter the user name, password and the domain for the account on the SMTP server using the text boxes provided.
      - Uncheck the **Use Custom Credentials** box which disables the custom credentials settings and the default credentials associated with the user account running the NICE Inform Server service is used to connect instead.
   b. Within the **Server** section, enter the host address and port for the SMTP server in the text boxes provided. If the SMTP sever required a secure connection, check the **Use Secure Connection** box.
   c. Within the **Messages** section, you can specify the email address of the sender. If this is not specified, the email address associated with the NICE Inform Server service account will be used.
3. To test either delivery mechanism is configured correctly, do the following:

   a. Click the **Test** button and the T**est Server Connection** dialog is presented.
   b. Enter the text email address in the text box provided and click the **OK** button.
   c. A Progress dialog is presented providing details if the test was successful or not.
   d. Do one of the following:

- Check the **Close** dialog when complete box, which causes the dialog to close automatically shortly after the test has finished, unless an error has occurred.
- Once the test has finished, click the **Close** button to close the dialog.

4. At the **User Mappings** section, all found Microsoft Exchange Server users are listed in the **Email Mappings** table. The following conditions can be displayed for each email address:

   – **Discovering...** - the user is an Active Directory based user whose email address is set for auto discovery but whose email address has not been discovered yet.

   – **Discovered** - the Active Directory based users' email address has been discovered and displayed in the following format *username@email.com (Discovered)*.

NOTE: When a user's email address is set to auto discover, the address is never stored but is always discovered from their Active Directory entry on demand. Therefore, the status of Discovering... is displayed initially whilst their email address is discovered.

   – **Email address** - the email address has been entered manually because the user is a NICE Inform user and not associated with an Active Directory entry. To add the email address manually, click the **Edit** button (see below) or configure user email notifications within NICE Inform Administration (refer to *Notifications page* within *NICE Inform User Administration*.

5. Each entry in the **Email Mappings** table can be edited. To do this:

   a. Select the entry in the table.

NOTE: Multiple selection is **NOT** supported.

   b. Click the **Edit** button and the **Edit User** dialog is presented. Do one of the following:

   - Check the **Auto Discover** box. Notifications will be delivered to the email address associated with the users Active Directory entry. The email address is displayed as read-only in the **Address** text box below.

NOTE: For users that have been added as NICE inform users and not associated with an Active Directory entry, the Auto Discovery box is disabled and therefore you **MUST** enter the address manually using the Address text box.

Recovering the user's email address from Active Directory can take some time. During this period, the text *Discovering...* is displayed.

   - Uncheck the **Auto Discovery** box and enter the email address in the **Address** text box.

6. Click the **OK** button.

NOTE: Users email settings can be reset. Select one or more users in the Email Mappings table and click the **Reset** button. For all Active Directory users, they are reset to auto discover and the email addresses are removed for all non based Active Directory users.

7. On completion, click the **Save** button.

24.2 Email notification content

This section details the email notification content for evaluations and what is included depending on the configured routing notification options as set within the Notifications (see page 244) page.

All email notifications include the following information:

- A summary of the notification
- A detailed description of the notification
- The NICE Inform user who is the intended recipient of the notification

The table below details what is included per notification depending on the routing notification options.

Table 24-1: Email notification content

Notification	Description / Content	Destination
Notify when evaluation assignment is set, or modified	A notification is generated when an evaluation is first assigned to an evaluator and whenever the assigned evaluator is changed. This notification includes the following content: ▪ Name of evaluation ▪ Evaluated user ▪ Previous evaluator (if applicable)	Current evaluator
Notify when review of evaluations is requested	A notification is generated whenever a review of an evaluation is requested. This notification includes the following content: ▪ Name of evaluation ▪ Evaluator	Evaluated user
Notify when reconsideration of evaluations is requested	A notification is generated whenever the subject of an evaluation requests that their review be reconsidered. This notification includes the following content: ▪ Name of evaluation ▪ Evaluated user	Current evaluator
Notify when a scheduled evaluation cannot be created due to a lack of calls	A notification is generated whenever a scheduled evaluation cannot be generated due to a lack of qualifying calls. This notification includes the following content: ▪ The schedule name	Scheduled evaluator
Scheduled evaluation missed due to lack of operator resources	A notification is generated whenever a scheduled evaluation cannot be generated due to a lack of operator resources. This notification includes the following content: ▪ The schedule name ▪ Evaluated User	Evaluated user

25 NICE Inform Database backups

NOTE: Specific terminology is used when navigating the tree pane to back up a NICE Inform database. For help with this terminology, refer to Tree structure terminology (see page 4).

Tape backups have to be queried to show the contents, which might take some time.

NICE Inform allows all configuration and audit data on the NICE Inform server to be backed up through the backup utility in the System Administration application. By navigating the tree pane, you can view any backups that exist on each device. A backup device is created during the installation of NICE Inform.

NICE Inform databases

The backup device is called 'NICEInformDefaultBackup' and is located on the same drive as the NICE Inform databases.

NOTE: When configured for NICE Inform Server Resilience, the backup is disabled on standby NICE Inform servers.

The NICE Inform databases are:

- InformAdmin
- InformAnnotation
- InformAudit
- InformEvaluation
- InformIncident
- InformReporterAdmin

NICE Inform Warehouse database

If your NICE Inform server is licensed for NICE Inform Reporter, you will see an additional device called 'NICEInformWarehouseBackup'. It is located on the same drive as the NICE Inform databases.

The NICE Inform Warehouse database is:

- InformReporterWarehouse

Configuring NICE Inform database and NICE Inform Warehouse backups

► To configure NICE Inform database and NICE Inform Warehouse backups:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.
2. Expand the **Inform Servers** node and select the required **Inform server** node.
3. Select the **Database Backups** node. The **Backup Schedule** page is displayed.

NOTE: If using Microsoft SQL Server™ Express, backup scheduling is unsupported and therefore the **Occurrence** information is manual, the **Time** information is unavailable and the **Status** information is disabled.

This section covers the following areas:

25.1 Configuring a NICE Inform scheduled database backup

▸ To configure a NICE Inform scheduled database backup:

1. Within the **Backup Schedules** table, do one of the following:
   - Select NICE Inform Full Backup and click the **Configure schedule** button.
   - Double-click **NICE Inform Full Backup**.

NOTE: In both cases the **Configure Schedule** dialog is presented.

The name of the backup schedule is displayed for your information only.

If you have upgraded your version of NICE Inform, then you may have more than one backup schedule in the **Backup Schedules** table.

If you are using Microsoft SQL Server™ Express, the **Configure schedule** button is disabled as scheduling backups is unsupported in this version.

2. To enable the backup schedule, check the **Schedule enabled** box. To disable the backup schedule, uncheck the **Schedule enabled** box.
3. In the **Occurs** section, select one of the following:
   - **Daily** - the database backup is scheduled daily. select one of the following:
     - **At specified backup time** - the backup occurs at the time specified within the Time section.
     - **At specified interval** - the backup occurs at a specified time interval. Enter the time interval (in minutes) in the text box provided or by using the up/down arrows.
   - **Weekly** - the database backup is scheduled weekly. Set the required day (or days) of the week by checking the associated box (or boxes).

NOTE: You **MUST** select at least one day.

   - **Monthly** - the database backup is scheduled monthly. Click the down arrow and select the required day of the month.

4. In the **Time** section, the following option is available:
   - **Backup time** - the time of the day that the backup is scheduled. Enter the time using the text box provided. Time entry is assisted by either selecting the hours, minutes or AM/PM and then using the up/down arrows.
5. In the **Backup Type** section, select one of the following:
   - **Append** - the NICE Inform databases are appended (added).
   - **Overwrite** - the NICE Inform databases are overwritten.
6. Once you have configured the database backup schedule, click the **OK** button.

The scheduled backup is now updated in the **Backup Schedules** table.

The **Backup Schedules** table displays the following information:

NOTE: Apart from the ℹ column, each column can be sorted in descending or ascending order by clicking the column heading and can be reordered by dragging them to the required location.

Table 25-1: Backup Schedules table columns

Column	Description
ℹ	An ⊗ icon is displayed if there database backup schedule was unsuccessful.
Schedule name	The name of the database backup schedule.
Databases	The databases backed up when running the backup schedule.
Device path	The Microsoft SQL backup device path.
Occurrence	The occurrence of the backup schedule e.g. the day of the week, or whether it is daily or monthly.
Time	The time the backup is scheduled for.
Last run outcome	The outcome of the last scheduled database backup (either succeeded or failed).
Status	The current status of the backup schedule (either idle, running or disabled).

25.2 Starting a scheduled NICE Inform backup

▸ To start a NICE Inform backup:

1. Within the **Backup Schedules** table, select the **Inform** scheduled backup.
2. Click the **Start backup** button. You are presented with a dialog informing you that you have to over write your backups.

NOTE: If you need to keep old backups then you **MUST** save them prior to backing up your NICE Inform server. In this case click the **NO** button and save your backups before starting a new backup.

3. Click the **OK** button. You are presented with a dialog confirming the backup has started successfully.
4. Click the **OK** button.

NOTE: Disabled backup schedules **CANNOT** be run immediately.

25.3 Configuring the backup destination path

▶ To configure the backup destination for all displayed backup schedules:

1. Click the **Configure backup destination** button and the **Configure Destination dialog** is presented.
2. Select one of the following:
   - **Tape** - the destination of the backup will be stored on a connected tape drive on the backup device.
   - **Device path** - enter the device path using the associated text box for all backup devices. This can either be a physical drive location (e.g. *c:\backup\device1*) or a network share (e.g. \\<*server name*>*backup**device1*).

NOTE: The backup will be stored in the specified device path.

You **MUST** ensure that the path exists on the server.

3. Click the **OK** button.

All subsequent database backups now follow this new destination.

25.4 Restoring a NICE Inform backup

You can restore a backup once you have performed a scheduled backup by using SQL Server Management Studio.

NOTE: For supported versions of Microsoft SQL Server, refer to your NICE Inform Software Release Note.

To restore a backup using Microsoft SQL Server™ Express, you require Microsoft SQL Server Management Studio Express to be installed. This is not part of the standard Microsoft SQL Server Express installation which is available from the Microsoft website.

25.5 NICE Inform database backup device

NOTE: Specific terminology is used when navigating the tree pane to view the backup device. For help with this terminology, refer to Tree structure terminology (see page 4).

▶ To view the details of all the NICE Inform database backups that are stored on the backup device:

1. In the tree pane, expand the **Recording Systems** node and then expand the **Site** node.

2. Expand the **Inform Servers** node and select the required Inform server node.

3. Expand the **Database Backups** node and then expand the **Backup Device** node. The **Backup Device** page is presented.

The following backup device details are displayed:

NOTE: Each column can be sorted in descending or ascending order by clicking the column heading. You can also reorder the columns by dragging them to the required location.

Table 25-2: Backup Device table columns

Column	Description
Backup name	The name of the backup stored on the backup device.
Database	The NICE Inform database that has been backed up on the backup device.
Date	The date/time that the backup was performed.
Description	The description entered when creating a scheduled database backup.
Size	The size (MB) filled on the backup device for the NICE Inform database.

ABOUT NICE

NICE (NASDAQ: NICE) is the worldwide leader of software solutions that deliver strategic insights by capturing and analyzing mass quantities of structured and unstructured data in real time from multiple sources, including phone calls, mobile apps, emails, chat, social media, and video. NICE solutions enable organizations to take the Next-Best-Action to improve customer experience and business results, ensure compliance, fight financial crime, and safeguard people and assets. NICE solutions are used by over 25,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies. www.nice.com

CONTACTS

Global International HQ, Israel,
T +972 9 775 3777

EMEA, Europe and Middle East,
T +44 0 1489 771 200

Americas, North America,
T +1 551 256 5000

Asia Pacific, Singapore Office
T +65 6222 5123

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