



CUSTOMEREXPERIENCEMANAGEMENT

ARCHIVING GUIDE

PURPOSE: This guide is intended to provide detailed instructions for call archiving in the CXM® call recording system.



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The purpose of this guide is to provide detailed instructions for call archiving in the CXM® call recording system. This document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Co-nexus. Co-nexus assumes no responsibility or liability for any errors or inaccuracies that may appear in this book.

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SYSTEM LOGIN

After launching the browser program, type in the URL for CXM®. All Users and Administrators that access the CXM® system will use this same URL. For future reference please record your CXM® URL on the line below:

http://_____

If there are any problems accessing the URL, please contact CXM® Support for further help.

A menu item in Favorites can be set in Internet Explorer for easier access to the URL. Also a desktop shortcut icon can be placed on the desktop.

In the middle part of the screen is the system login area. The system requires a User name and password. The system Administrator will provide these, and they should be different from the User's network user name and password.



To Login to the CXM® System:

1. Enter User Name and Password into the appropriate *Login* fields.
2. Click *Login* or press *Enter*. All Users are taken to the *Quick Search* screen.

To Change Your Password:

1. To change your password, first select *My Login* and then *Change Password* from the options on the left side of the screen. You can also access the *My Login* → *Change Password* screen by clicking on *My Login* and *Change Password* from the CXM® menu.
2. Enter your new password into the *New Password* field.
3. Enter your new password one more time into the *Confirm Password* field.
4. Click the OK button to finalize your new password. A confirmation message will appear at the bottom of the screen.

To View Your Profile:

1. To view your profile, first select *My Login* and then *Profile* from the options on the left side of the screen. You can also access the *My Login* → *Profile* screen by clicking on *My Login* and *Profile* from the CXM® menu.
2. Your profile will appear on this screen, listing your user information and rights.

ARCHIVING

The purpose of the Archiving section is to enable the User to view a log of archive/restore events, check the status of archive media, archive and restore calls, and set scheduled archiving protocol. To go to the Archiving section of CXM®, click on *System* and *Archiving* in the left column or in the CXM® menu located at the top of the window. This section is only accessible to Users with System Administrator rights.

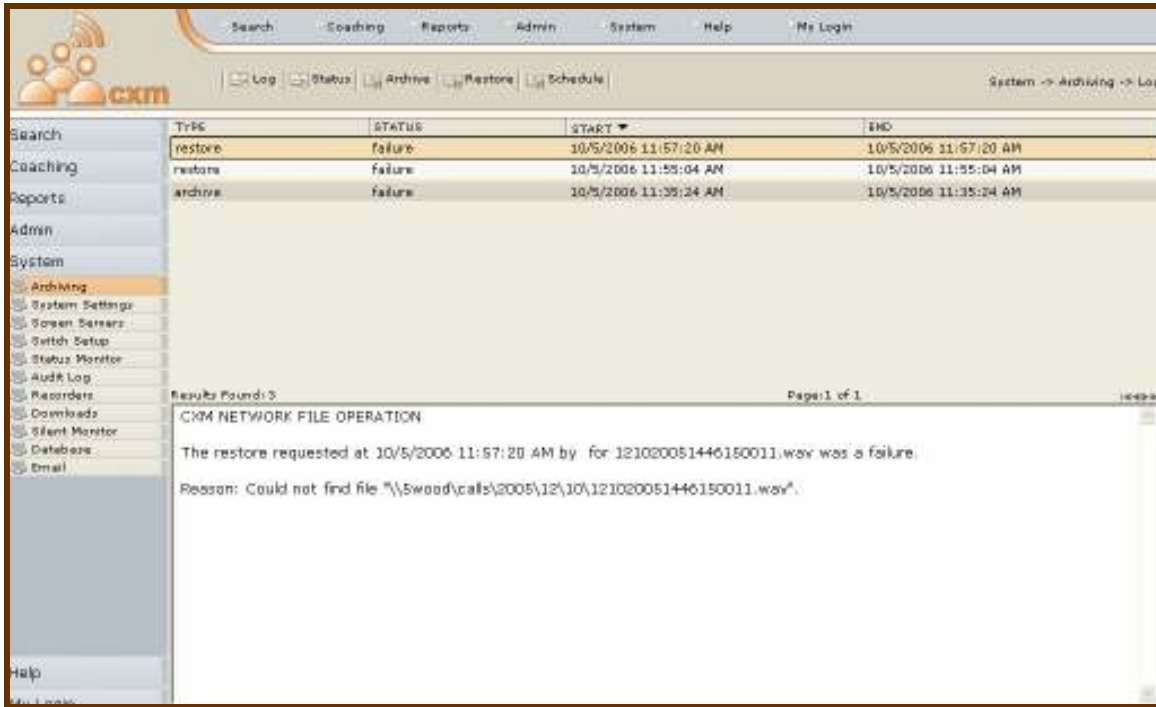
The System Administrator has the rights to access, set and update the following sections:

- [Log](#)
- [Status](#)
- [Archive](#)
- [Restore](#)
- [Schedule](#)

LOG

The Log section displays archive/restore events and details in the CXM® System. This information can also be found on Desktop Monitor.

To View Log Details:



1. To view log details in the CXM® system, first select *System* and then *Archiving* from the options on the left side of the screen. You can also access the *System->Archiving* screen by clicking on *System* and *Archiving* from the CXM® menu. The Log screen will appear with a list of archive/restore events in the top portion of the screen.
2. To view further details about an archive or restore event, click to highlight the row containing the desired event. Details regarding that event will appear in the lower portion of the screen.

STATUS

The Status section displays the current status and space availability of the archiving media used by your CXM® system. For CXM® Systems with dual tape drives, a *Restore Tape* section will also appear on the Status page.

NOTE: If BriteStor gives a prompt to change the tape, please do the following:

1. Cancel the prompt.
2. Insert a new tape into the tape drive.
3. Initialize the new tape. ([Click here](#) for initializing instructions.)
4. Allow the next scheduled archive to run.

To Check Tape/Disk Status:

The screenshot shows the CXM® web interface. The top navigation bar includes links for Search, Archiving, Reports, Admin, System, Help, and My Login. A red arrow points to the 'Status' link in the 'Archiving' section. Below the navigation bar, there are links for Log, Status, Archive, Restore, and Schedule. The main content area is divided into two columns. The left column shows 'CXM Tape' with details: Name: CXMTR103106013023, Status, Total Space: 20G, Used Space: 0G, Free Space: 20G. The right column shows 'DVD' with details: Data, 22G, 10, 12G. There are buttons for 'Initialize tape', 'Check status', and 'Check status'. A green message 'Status received!' is visible at the bottom of the main content area.

1. To check the archiving tape/disk status of the CXM® system, first select *System* and then *Archiving* from the options on the left side of the screen. You can also access the System →

Archiving screen by clicking on *System* and *Archiving* from the CXM® menu.

2. Click the *Status* button located below the CXM® menu (see arrow above). The following information will appear for the archiving media used by your CXM® system:
 - *Name*: the name of the CXM® archiving media (created by CXM®)
 - *Status*: displays "idle" or "busy" to show status of archiving in progress
 - *Total Space*: the total amount of space on the archiving media
 - *Used Space*: the amount of space used on the archiving media
 - *Free Space*: the amount of free space available on the archiving media
3. To check the current status of the archiving media, click the *Check Status* button located at the bottom of the box. The current status will be displayed.

To Initialize an Archive Tape:

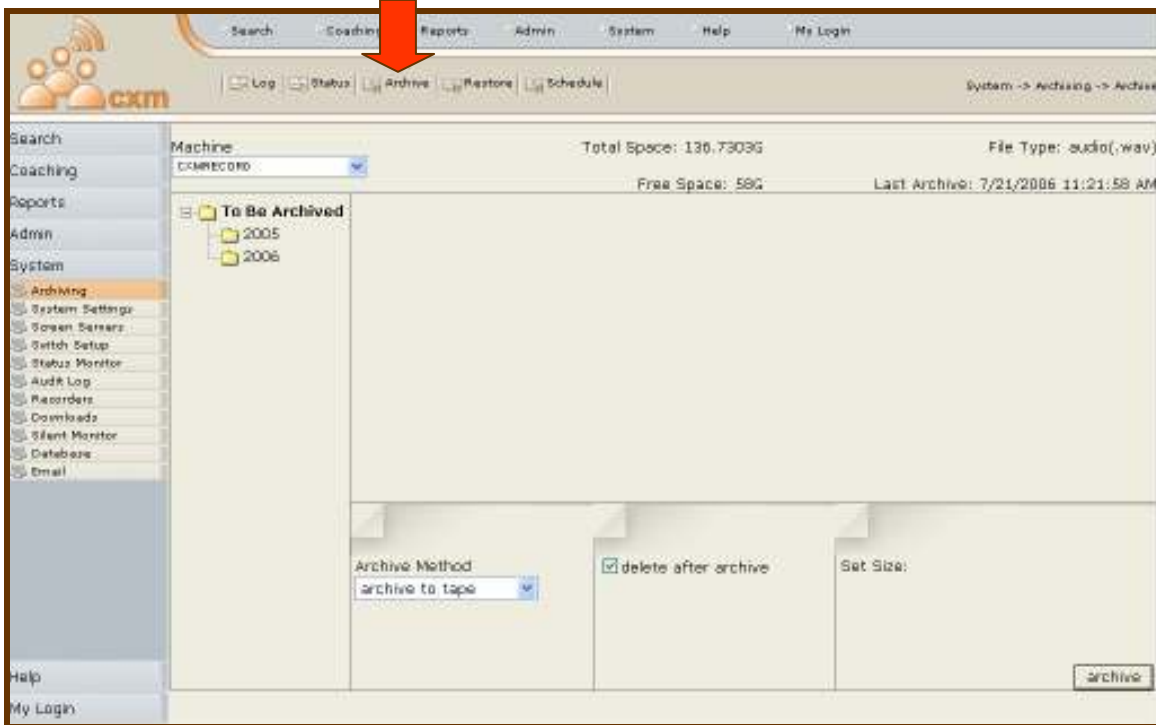
Before using an archive tape, the tape will need to be initialized (formatted). **CAUTION: Initializing a tape will cause all data on the tape to be erased.**

1. To initialize an archive tape, first place the tape in the proper tape drive.
2. Go to the System → Archiving → Status screen in the CXM® user interface.
3. Click the *Initialize Tape* button located in the CXM Tape box. A confirmation message will appear at the bottom of the screen to confirm initialization of the tape.

ARCHIVE

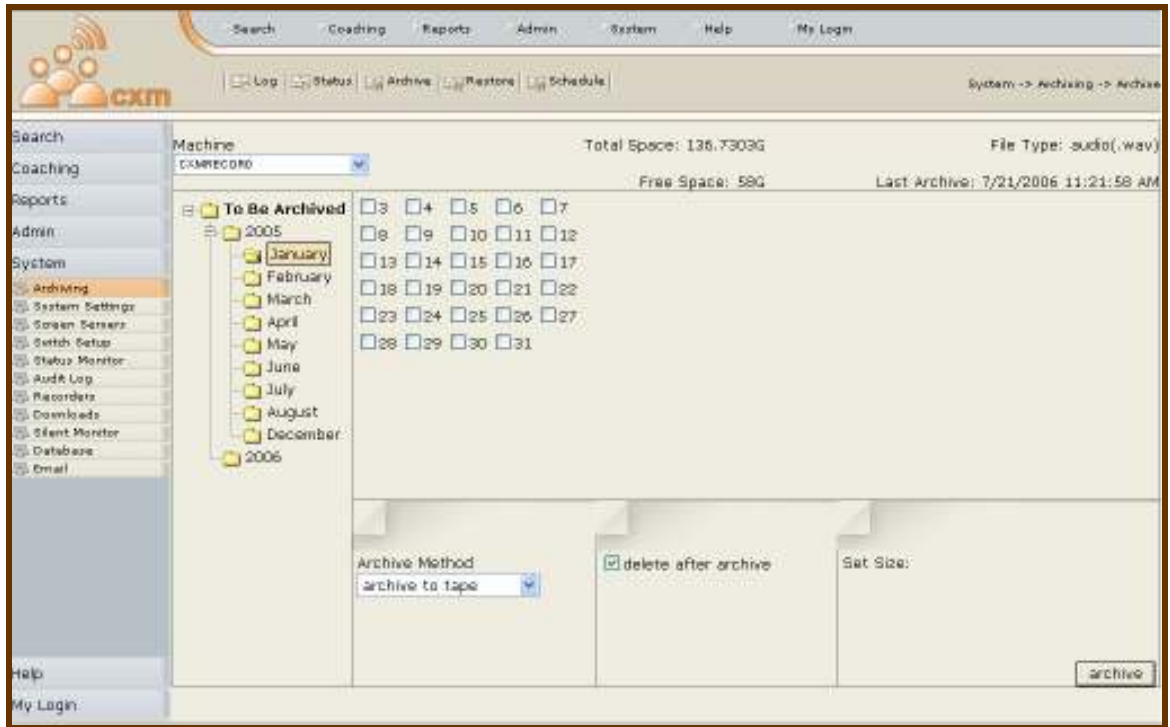
The Archive section of the CXM® System allows the Administrator to archive calls manually. **Note: This method is not the recommended method for archiving calls. Please see the Schedule section of this document for instructions to schedule regular, automatic archiving.**

To Archive Calls (Manually):



1. To manually archive calls in the CXM® system, first select *System* and then *Archiving* from the options on the left side of the screen. You can also access the *System* → *Archiving* screen by clicking on *System* and *Archiving* from the CXM® menu.
2. Click the *Archive* button located below the CXM® menu (see arrow above).
3. Select, from the *Machine* drop-down box, the machine from which to archive calls.
4. In the tree view that appears on the left side of the screen, select the appropriate year and month containing the calls to be archived.

- The days of the selected month that contain calls that have not been archived will appear in the right portion of the screen (see below).



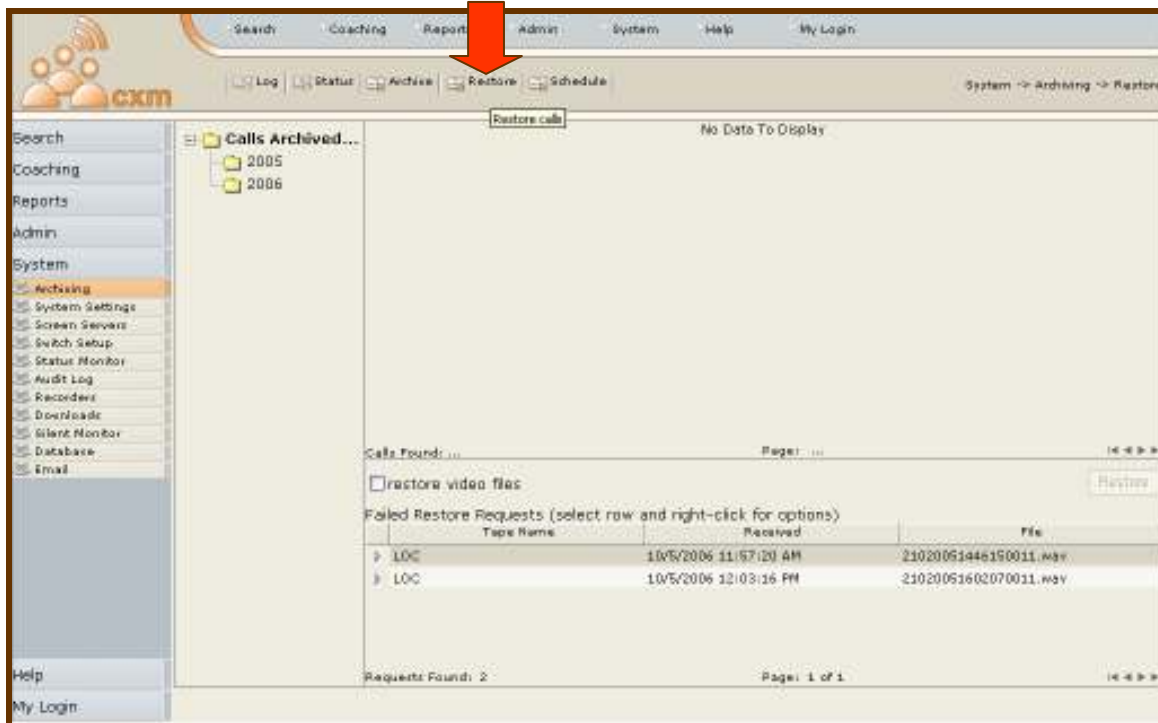
- Click the box next to the corresponding day(s) of the month from which calls are to be archived. A green check mark will appear in the box and the size of the file containing the calls from that day will appear next to the day of the month.
- In the lower portion of the screen, select the desired archive method from the drop-down box:
 - Archive to Tape*: archives calls to the tape in the tape drive
 - Archive to Disk*: archives the calls to another machine that is dedicated to call archiving (Enter the appropriate machine name after selecting this option.)
 - Archive to DVD*: archives calls to DVD
 - Delete Only*: marks the calls in the database as deleted and the call file will be permanently deleted (the call will still appear in the database, but it cannot be restored)
- Select the desired delete option:

- *Delete after Archive* (selected): if the call is successfully written to tape/disk/DVD, the call will be marked as archived in the database and then deleted
 - *Delete after Archive* (not selected): after the call has been archived successfully, it is not marked as archived in the database, and will still appear in the *To Be Archived* list (above)
9. The Set Size displays the total size of the selected calls to be archived.
 10. Click the *Archive* button located in the lower right corner of the screen to archive the selected calls. A confirmation message will appear to confirm archiving.

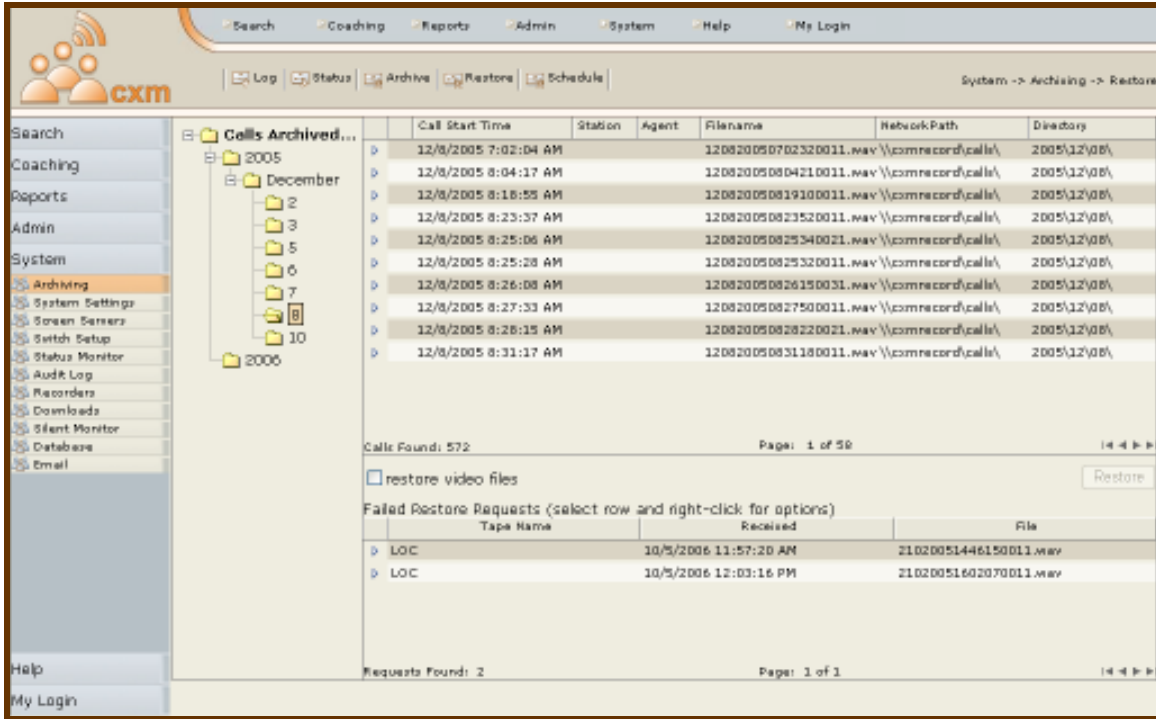
RESTORE

To Restore an Archived Call:

A call that has been archived can be restored from the tape/disk to its original location. **Note: Before making a restore request, be sure the proper tape containing the desired call is located in the tape drive.**



1. To restore an archived call, first select *System* and then *Archiving* from the options on the left side of the screen. You can also access the *System* → *Archiving* screen by clicking on *System* and *Archiving* from the CXM® menu.
2. Click the *Restore* button located below the CXM® menu (see arrow above).
3. In the tree view that appears on the left side of the screen, select the appropriate year, month and day that contains the call to be restored. A list of the restored calls for the selected day will appear in the right portion of the screen (see below).



4. Click to highlight the desired call in the list. The *Restore* button located below the Archived Calls list will be activated.
5. The *Restore Video Files* option allows the user to restore both the video and sound files on calls that have screen files attached to the sound files (Screen Capture calls). If this option is not selected, only the sound file will be restored to the CXM® database.
6. Click the *Restore* button. The call will be restored to its original location and will appear in the CXM® database. A confirmation message will appear at the bottom of the screen.
7. Return to the *Search* screen and perform a new search for the restored call.

Options for Failed Restore Requests:

At the bottom of the System → Archiving → Restore screen is a list of all failed restore requests. This list includes the name of the tape, the date/time of the restore request and the name of the file that was requested to be restored (see below). **Note: Before making a restore request, be sure the proper tape containing the desired call is located in the tape drive. Having an improper tape in the tape drive will result in a failed restore request.**

Failed Restore Requests (select row and right-click for options)		
Tape Name	Received	File
LOC	/2006 11:57:20 AM	21020051446150011.wav
LOC	/2006 12:03:16 PM	21020051602070011.wav

Requests Found: 2 Page: 1 of 1

To delete a restore request from the list, click to highlight the row containing the desired restore request. Right-click on the highlighted row and select *delete restore request* from the menu that appears. The request will be deleted from the list.

To “retry” the restore request, click to highlight the row containing the desired restore request. Right-click on the highlighted row and select *retry* from the menu that appears. The restore request will be resubmitted.

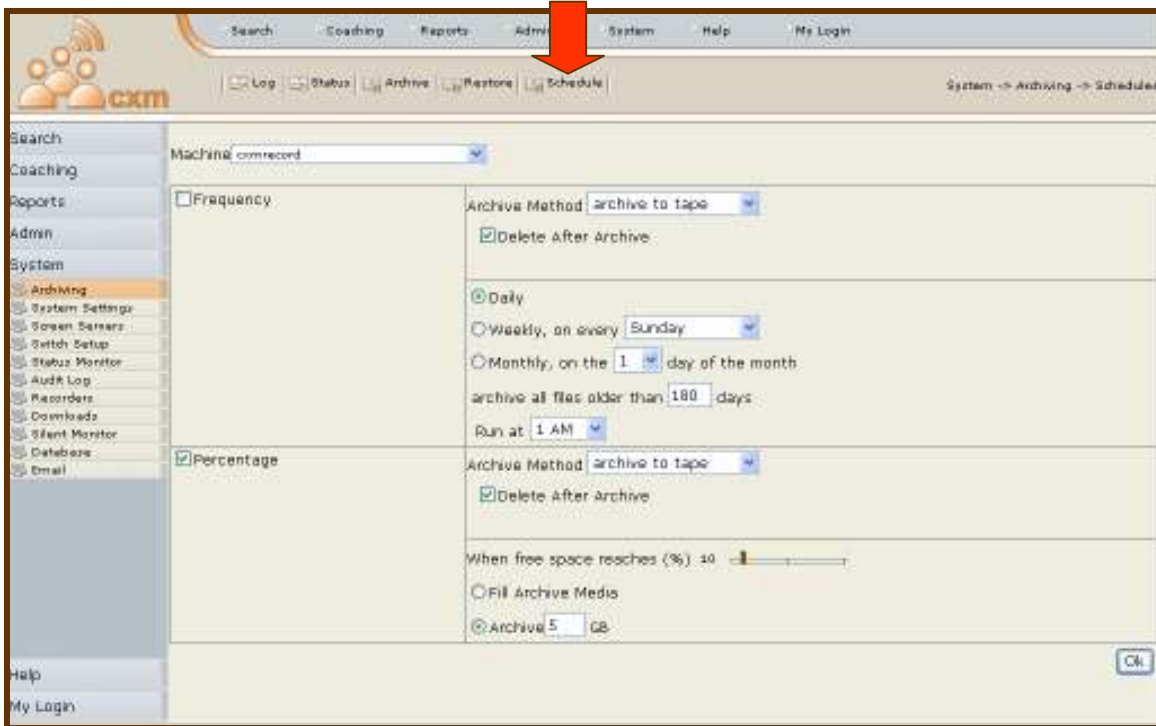
To refresh the Failed Restore Requests list, click to highlight a row containing a restore request. Right-click on the highlighted row and select *refresh* from the menu that appears. The Failed Restore Requests list will be updated.

SCHEDULE

Scheduling the regular, automatic archival of calls is recommended in order to maintain adequate space on the CXM® calls drive. Archiving can be scheduled by frequency (occurring on a daily, weekly or monthly basis) and/or percentage (occurring when free space on the calls drive reaches a set amount).

Note: A call archiving schedule should be set for EACH call server and/or screen server.

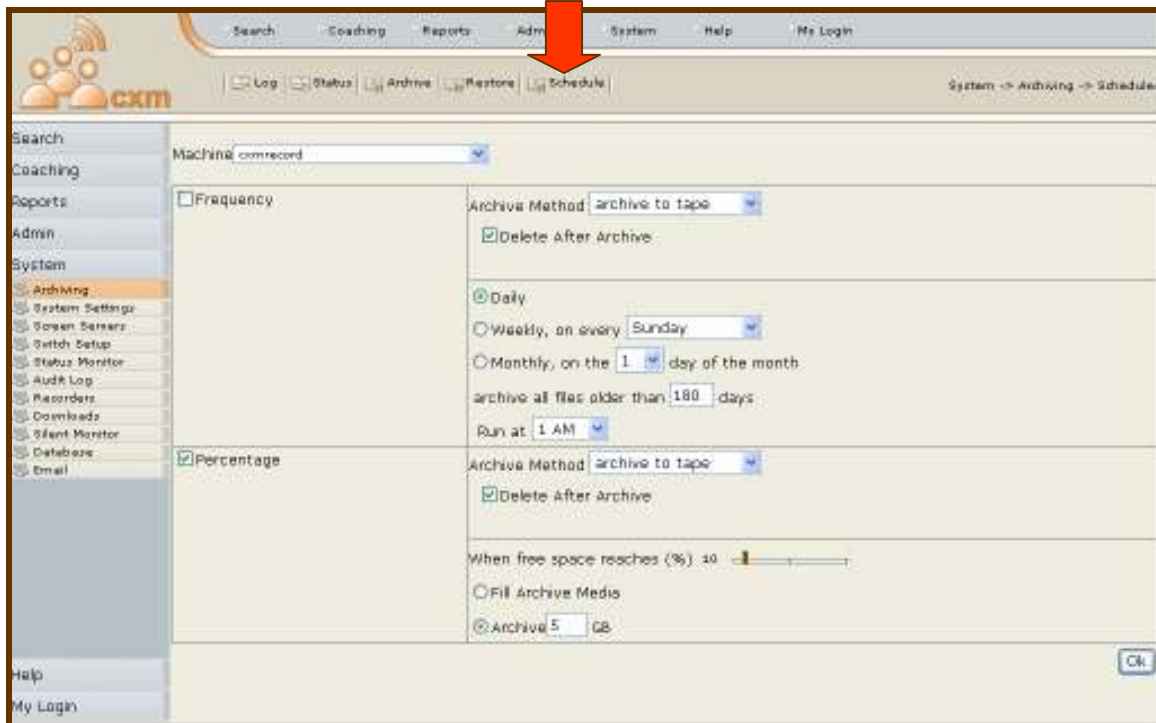
To Schedule Call Archiving by Frequency:



1. To schedule call archiving by frequency, first select *System* and then *Archiving* from the options on the left side of the screen. You can also access the *System* → *Archiving* screen by clicking on *System* and *Archiving* from the CXM® menu.
2. Click the *Schedule* button located below the CXM® menu (see arrow above).
3. Select, from the *Machine* drop-down box, the server for which call archiving is to be scheduled.

4. Click to select the *Frequency* box.
5. Select an Archive Method from the drop-down box:
 - *Archive to Tape*: archives calls to the tape in the tape drive
 - *Archive to Disk*: archives the calls to another machine that is dedicated to call archiving
 - *Archive to DVD*: archives calls to DVD
 - *Delete Only*: marks the calls in the database as deleted and the call file will be permanently deleted (the call will still appear in the database, but it cannot be restored)
6. Select desired delete option:
 - *Delete after Archive (selected)*: if the call is successfully written to tape/disk/DVD, the call will be marked as archived in the database and then deleted
 - *Delete after Archive (not selected)*: after the call has been archived successfully, it is not marked as archived in the database
7. Select the desired frequency of call archiving:
 - *Daily*: archives calls daily
 - *Weekly*: archives calls weekly on every (select day of the week from drop-down box)
 - *Monthly*: archives calls monthly on every (select day of the month from drop-down box)
 - *Archive all files older than*: (enter the number of days)
 - *Run at*: (select time of day from the drop-down box)
8. Click the OK button located in the lower right corner to finalize the schedule.

To Schedule Call Archiving by Percentage:



1. To schedule call archiving by percentage, first select *System* and then *Archiving* from the options on the left side of the screen. You can also access the *System* → *Archiving* screen by clicking on *System* and *Archiving* from the CXM® menu.
2. Click the *Schedule* button located below the CXM® menu (see arrow above).
3. Select, from the *Machine* drop-down box, the server for which call archiving is to be scheduled.
4. Click to select the *Percentage* box.
5. Select an *Archive Method* from the drop-down box:
 - *Archive to Tape*: archives calls to the tape in the tape drive
 - *Archive to Disk*: archives the calls to another machine that is dedicated to call archiving
 - *Archive to DVD*: archives calls to DVD
 - *Delete Only*: marks the calls in the database as deleted (the call will still appear in the database, but it cannot be restored)
6. Select desired delete option:

- *Delete after Archive* (selected): if the call is successfully written to tape/disk/DVD, the call will be marked as archived in the database and then deleted
 - *Delete after Archive* (not selected): after the call has been archived successfully, it is not marked as archived in the database
7. Calls will automatically be archived when the free space on the selected machine reaches the desired percentage. Select the desired percentage on the slider bar next to the words "When free space reaches (%)".
 8. Select the desired size of archival:
 - *Fill Archive Media*: Selecting this option will cause the entire archive media (tape, disk, DVD) to be filled with archived files.
 - *Archive (enter number) GB*: selecting this option allows only the designated number of GB of files to be archived at one time.
 9. Click the OK button located in the lower right corner to finalize the schedule.

SYSTEM LOGOUT

1. To log out of the CXM® System, click *My Login* in the bottom left corner, or from the CXM® menu. The *Logout* page will appear.
2. Click *Logout* to end your CXM® session. This will take you to the CXM® *Login* screen.

