INSPIRATION*neo*

Template generator

User manual

5/17/2019

Product line *neo*, version 6.x

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

INSPIRATION*neo*

Please note that you can always find the most up-to-date technical documentation and product updates in the partner area on our website at http://www.asctechnologies.com.

Copyright © 2019 ASC Technologies AG. All rights reserved.

Windows is a registered trademark of Microsoft Corporation. VMware® is a registered trademark of VMware, Inc. All other marks and names mentioned herein may be trademarks of their respective companies.

ASC Technologies AG - Seibelstr. 2-4 - 63768 Hösbach - Germany

Contents

1 General information 6

2 Introduction 7

3 Create template 8

4 Toolbar of the template generator 10

4.1 Delete element in working area 10

4.2 Cut and paste element in working area 10

4.3 Copy and paste element in working area 11

4.4 Align elements left in working area 11

4.5 Align elements in the working area to top 11

4.6 Toggle grid in working area 11

4.7 Edit section 11

4.7.1 Add new section 13

4.7.2 Delete section 13

4.7.2.1 Delete section - possibility 1 13

4.7.2.2 Delete section - possibility 2 14

4.7.3 Change section 14

4.7.3.1 Change section - possibility 1 14

4.7.3.2 Change section - possibility 2 15

4.8 Select rating scheme 15

4.9 Add skills 16

4.10 Show preview 17

4.11 Show summary 18

5 Element bar 20

5.1 Tab Elements 20

5.1.1 Element Radio Button Question 21

5.1.2 Element Combo Box Question 21

5.1.3 Element yes/no question 22

5.1.4 Element Remark 22

5.1.5 Element Comment 22

5.1.6 Element text 22

5.1.7 Element Question Group 22

5.1.8 Element image 22

5.1.9 Element Link 23

5.1.10 Element line 23

5.1.11 Element Multiple Choice Question 23

5.1.12 Element 0 - 9 Question 23

5.1.13 Element 0 - 1 Question 23

5.1.14 Element Customer Comment 23

5.2 Tab Favorites ... 24
5.2.1 Save element as favorite ... 24
5.2.1.1 Save favorite in specific category ... 25
5.2.1.2 Create favorite category ... 25
5.2.1.3 Delete favorite category ... 27

6 Element browser ... 28
6.1 Select element ... 28

7 Element properties ... 29
7.1 General ... 29
7.1.1 Upload and add new audio file ... 30
7.1.2 Add audio file from the file list ... 31
7.1.3 Delete audio file from the file list ... 32
7.1.4 Add link ... 33
7.1.5 Add link from the file list ... 36
7.1.6 Add web address ... 37
7.1.7 Upload and add new image ... 38
7.1.8 Add image from the file list ... 40
7.2 Attachment ... 41
7.2.1 Upload and add new file as attachment ... 41
7.2.2 Add file from file list ... 44
7.2.3 Remove file as attachment of an element ... 45
7.2.4 Delete file from file list ... 45
7.2.5 Add web address as attachment ... 46
7.3 Answers ... 46
7.3.1 Edit answer ... 47
7.3.2 Add answer ... 48
7.3.3 Delete answer ... 48
7.4 Description ... 49
7.5 Question ... 49
7.6 Questions ... 50
7.6.1 Add questions ... 50
7.6.2 Remove question assignment ... 51
7.7 Question Group ... 51
7.8 Content ... 51
7.9 Categories ... 52
7.9.1 Create and add new category ... 52
7.9.2 Assign existing category ... 53
7.9.3 Delete category ... 54
7.9.4 Remove category assignment ... 55
7.10 Layout ... 55
7.10.1 Change color ... 55

7.10.2 Change the display area of the answer 56
7.11 Score Guide 56
7.12 Text 57
List of figures 58
List of tables 61
Glossary 62

1 General information

In the context of this document ASC represents ASC Technologies AG, its subsidiaries, branch offices, and distributors. An up-to-date overview of the aforementioned entities can be found at https://www.asctechnologies.com

ASC assumes no guarantee for the actuality, correctness, integrity or quality of the information provided in the manuals.

ASC regularly checks the content of the released manuals for consistency with the described hardware and software. Nevertheless, deviations cannot be excluded. Necessary revisions are included in subsequent editions.

Some aspects of the ASC technology are described in general terms to protect the ownership and the confidential information or trade secrets of ASC.

The software programs and the manuals of ASC are protected by copyright law. All rights on the manuals are reserved including the rights of reproduction and multiplication of any kind, be it photo mechanical, typographical or on digital data media. This also applies to translations. Copying the manuals, completely or in parts, is only allowed with written authorization of ASC.

Representative, if not defined otherwise, is the technical status at the time of the delivery of the software, the devices and the manuals of ASC. Technical changes without specified announcements are reserved. Previous manuals lose their validity.

The general conditions of sales and delivery of ASC in their latest version apply.

2 Introduction

The template generator allows you to create the following templates in different modules:

- Evaluation Templates
- Training Package Templates
- Quiz Templates
- Training packages for sessions

These templates enable you to evaluate sessions and agents for instance or to compile a training package or a quiz. Depending on the module you are currently using, the template generator offers different elements to design the layout of the template.

To open the template generator, click on the icon + *(Create)* in the toolbar of the main view of the module you are currently using. A detailed description of how to create individual templates can be found in the user manuals of the respective modules of INSPIRATION*neo*.

3 Create template

1. To go to the template generator, click on the icon + *(Create)* in the toolbar of the main view of the module you are currently using.
2. Select the respective menu item depending on your requirements and on the module you are using.
   ⇨ The following window opens automatically:

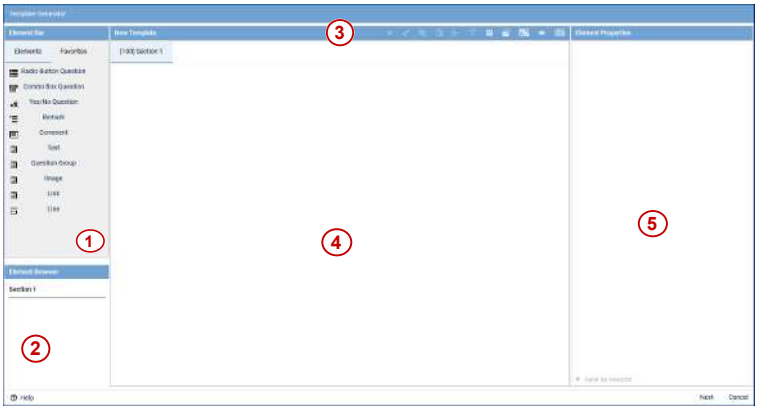


Fig. 1: Create template (example)

1	Element bar This area on the left side of the window contains the elements which are used to create templates. See chapter "Element bar", p. 20.
2	Element browser In this area, an overview of the template's sections as well as the elements they contain is displayed. See chapter "Element browser", p. 28 and chapter "Add new section", p. 13.
3	Toolbar This area contains the available control functions. See chapter "Toolbar of the template generator", p. 10.
4	Working area Here, you arrange the elements.
5	Element properties In this area, you define the details of the selected elements. See chapter "Element properties", p. 29.

Help	Opens the online help.

3. In the element bar, either in the tab *Elements* or in the tab *Favorites*, click on the element you would like to insert (see chapter "Tab Elements", p. 20 and chapter "Tab Favorites", p. 24).
   ⇨ The selected element is inserted into the working area.
   ⇨ The properties specific for the corresponding element are displayed in the element properties.
4. Design the element by editing the element-specific properties as required (see chapter "Element properties", p. 29).

5. Insert all elements that the template is supposed to contain.
   If required, you can divide the template into sections (see chapter "Add new section", p. 13 and chapter "Edit section", p. 11).
6. Organize the elements in the working area according to your requirements. To do so, use the functions in the toolbar (see chapter "Toolbar of the template generator", p. 10) or click on the individual elements to move them with the mouse cursor.
7. To save all changes in the cache and close the template generator, click on the button *Next*.
   To discard all changes and close the template generator, click on the button *Cancel*.
   ⇨ The window of the template generator is closed.

All templates must at least contain one element. Empty templates cannot be saved.

When creating a Call Director customer survey, insert the same number of answers and questions in the working area of the template generator as have been created for this survey in the Call Director.

8. Adjust all necessary settings within the displayed tabs of the respective module. For a detailed description of the tabs refer to the user manuals of the respective modules of INSPIRATION*neo*.
9. To save the template once you have finished adjusting the entries in the tabs, click on the button *Save*.
   To discard the entries and close the window, click on the button *Cancel*.

4 Toolbar of the template generator

The toolbar offers the following functions.

Fig. 2: Toolbar of the template generator (example)

	Delete	Deletes the selected element (see chapter "Delete element in working area", p. 10).
	Cut	Cuts the selected element (see chapter "Cut and paste element in working area", p. 10).
	Copy	Copies the selected element (see chapter "Copy and paste element in working area", p. 11).
	Paste	Pastes the cut or copied element (see chapter "Cut and paste element in working area", p. 10 and chapter "Copy and paste element in working area", p. 11).
	Align left	Aligns all selected elements to the left (see chapter "Align elements left in working area", p. 11).
	Align top	Aligns all selected elements to the top (see chapter "Align elements in the working area to top", p. 11).
	Toggle grid	Toggles a grid in the working area (see chapter "Toggle grid in working area", p. 11).
	Edit section	Opens a window in which you can create, edit, and delete sections (see chapter "Edit section", p. 11).
	Select rating scheme	Opens the window *Select Rating Scheme* (see chapter "Select rating scheme", p. 15).
	Skills	Opens a window in which you can add the skills of agents (see chapter "Add skills", p. 16).
	Show preview	Shows a preview of the template which is edited at the moment (see chapter "Show preview", p. 17).
	Summary	Shows a summary of the template which is edited at the moment (see chapter "Show summary", p. 18).

Not all described icons exist in every module and application.

4.1 Delete element in working area

1. In the working area or the element browser, click on the element you would like to delete. To select several elements at the same time, click on the elements you would like to delete in the working area while holding the [Ctrl] key down.

   ⇨ The selected element is marked in the working area.

2. Click on the icon *(Delete)*.
3. To really delete the selected element confirm the security prompt.

4.2 Cut and paste element in working area

1. In the working area or the element browser, click on the element you would like to cut. To select several elements at the same time, click on the elements you would like to cut in the working area while holding the [Ctrl] key down.

   ⇨ The selected element is marked in the working area.

2. Click on the icon *(Cut)*.

3. Click on the icon *(Paste)*.
   You can also paste the element several times in different sections.
   ⇨ The pasted element is displayed as the last element in the current working area.

4.3 Copy and paste element in working area

1. In the working area or the element browser, click on the element you would like to copy. To select several elements at the same time, click on the elements you would like to copy in the working area while holding the [Ctrl] key down.
   ⇨ The selected element is marked in the working area.
2. Click on the icon *(Copy)*.
3. Click on the icon *(Paste)*.
4. You can also paste the element several times in different sections.
   ⇨ The pasted element is displayed as the last element in the current working area.

4.4 Align elements left in working area

1. In the working area or the element browser, click on the element you would like to align the subsequently selected elements by.
2. In the working area or the element browser, hold the [Ctrl] key down and click on the elements you would like to align.
3. Click on the icon *(Align left)*.
   ⇨ All selected elements in the working area will be aligned left by the element you selected first.

4.5 Align elements in the working area to top

1. In the working area or the element browser, click on the element you would like to align the subsequently selected elements by.
2. In the working area or the element browser, hold the [Ctrl] key down and click on the elements you would like to align.
3. Click on the icon *(Align top)*.
   ⇨ All selected elements in the working area will be aligned top by the element you selected first.

4.6 Toggle grid in working area

The grid in the working area is a support tool to position the elements. When the elements are moved, they position themselves in the top left corner of the grid.

To toggle the grid in the working area, click on the icon *(Toggle grid)*.

4.7 Edit section

This function of the toolbar allows creating new sections and changing existing ones.

1. Click on the icon *(Edit section)*.
   ⇨ The window *Sections* appears.

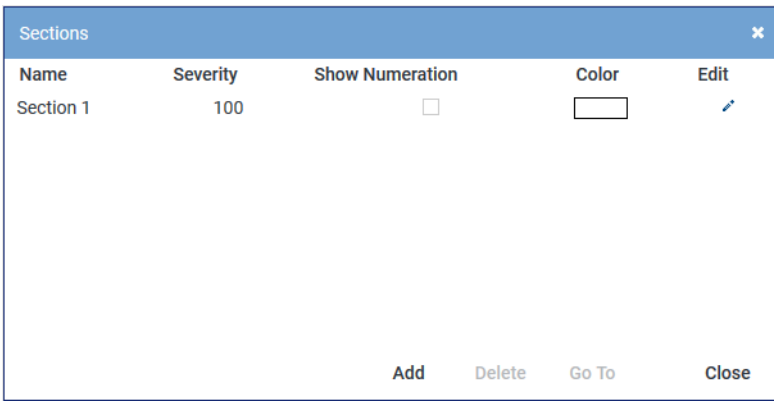


Fig. 3: Edit sections (example)

In the default setting, one section has been created automatically.

2. To adjust an existing section individually, click on the icon *(Edit)*.
3. Adjust the properties of the section.

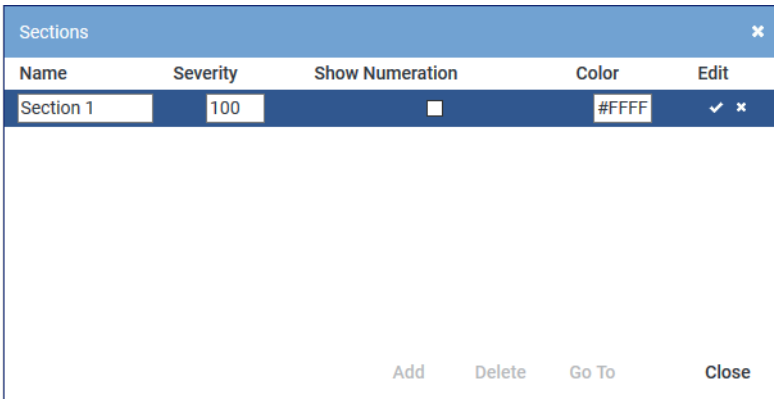


Fig. 4: Edit sections (example)

Name	Enter a name for the section. This name is displayed in the element browser.
Severity	This field allows you to define the importance which is given to the corresponding section during the evaluation. For the severity, you can enter a value from 0 to 100. The value 0 is used for additional questions which are not evaluated. The severity of the sections has to amount to 100 in total or every section has a severity of 100 or 0.
Show Numeration	Here, you determine whether a consecutive numeration is added to every element in the section. ☑ = Show numeration. ☐ = Does not display numeration. The numeration is displayed in the element in front of the question or question group. If you change the sequence of the positions, the numeration changes accordingly.
Color	Define the background color for the working area of the section (see chapter "Change color", p. 55).

The function *Severity* is only available when creating evaluation templates and quiz templates.

4. To save the changes, click on the icon *(Save)*.
   To discard the changes, click on the icon *(Discard)*.

4.7.1 Add new section

1. Click on the icon *(Edit section)*.
   ⇨ The window *Sections* appears.

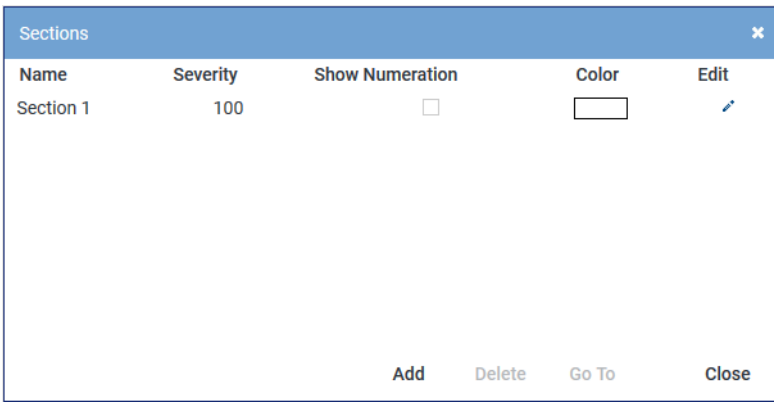


Fig. 5: Edit sections

2. Click on the button *Add*.
   ⇨ A section is added.

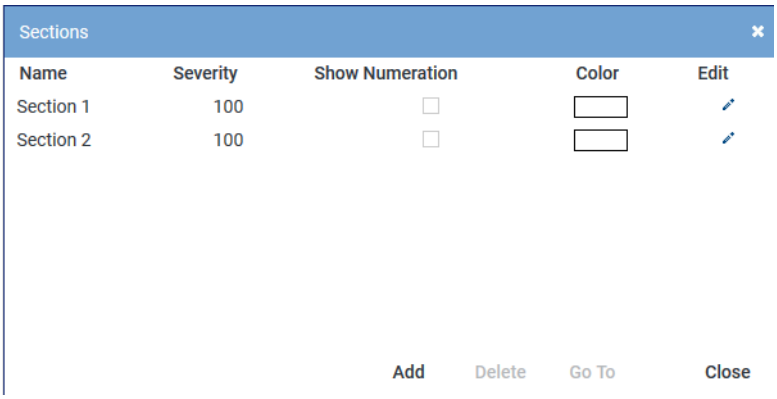


Fig. 6: Section added

3. To close the window *Sections*, click on the button *Close* or .

4.7.2 Delete section

You have 2 options to delete the section.

4.7.2.1 Delete section - possibility 1

1. Above the working area in the tab with the section name, click on the icon .

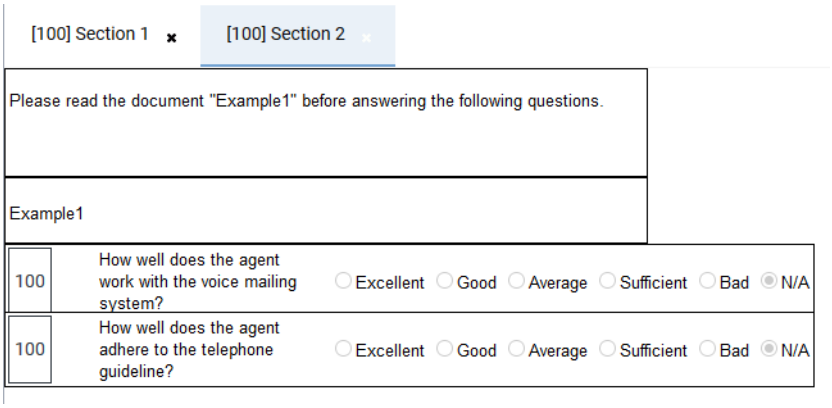


Fig. 7: Select section

2. To really delete the section, confirm the security prompt.

4.7.2.2 Delete section - possibility 2

1. Click on the icon *(Edit section)*.
   ⇨ The window *Sections* appears.

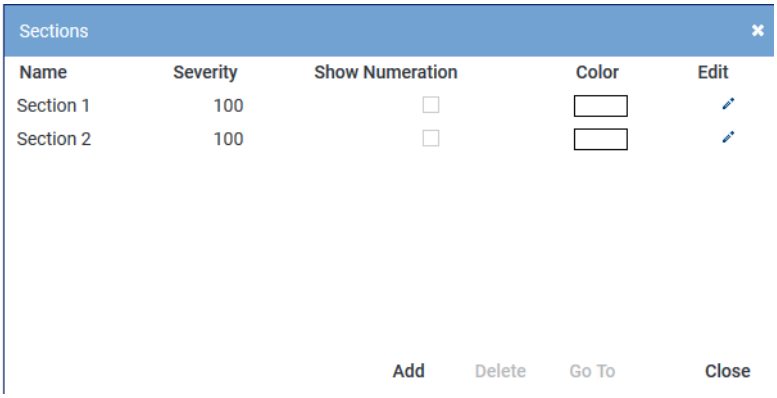


Fig. 8: Sections

2. Select the section you would like to delete and click on the button *Delete*.

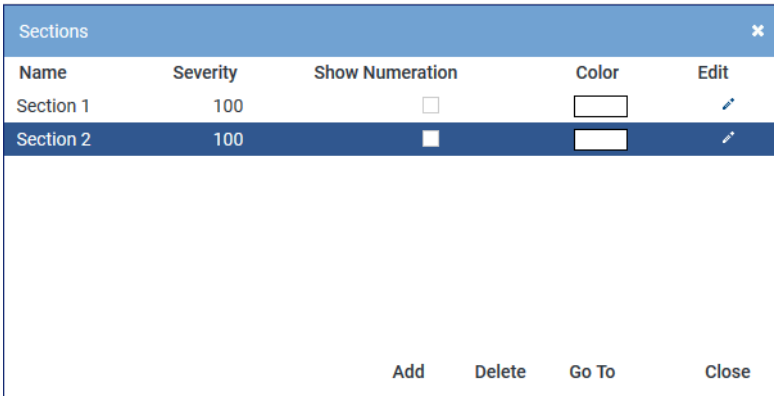


Fig. 9: Section selected

3. To really delete the section, confirm the security prompt.
4. To close the window *Sections*, click on the button *Close* or .

4.7.3 Change section

You have 2 options to change the section.

4.7.3.1 Change section - possibility 1

1. Above the working area, click on the tab with the section name.

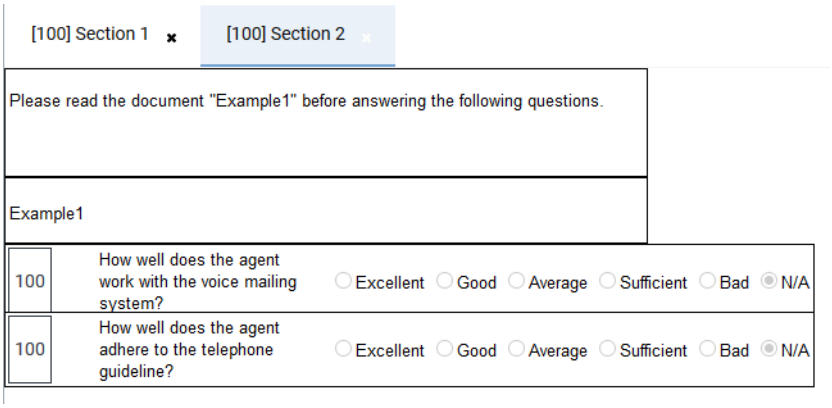


Fig. 10: Change section

4.7.3.2 Change section - possibility 2

1. Click on the icon *(Edit section)*.
   ⇨ The window *Sections* appears.

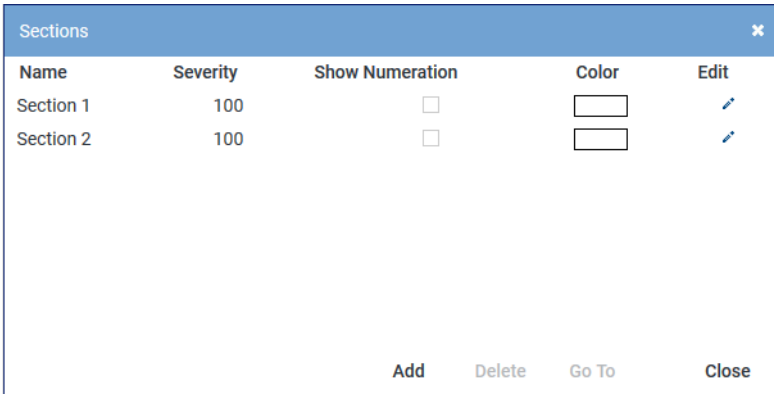


Fig. 11: Sections

2. Select the section you would like to change to and click on the button *Go To*.

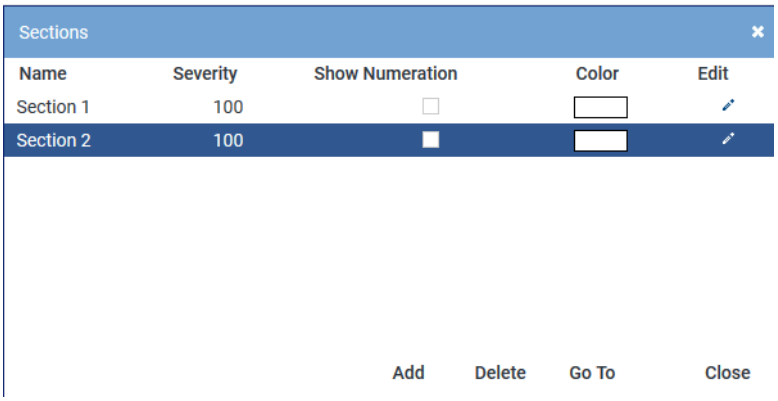


Fig. 12: Change section

4.8 Select rating scheme

1. Click on the icon *(Select rating scheme)*.
   ⇨ The window *Select Rating Scheme* opens.

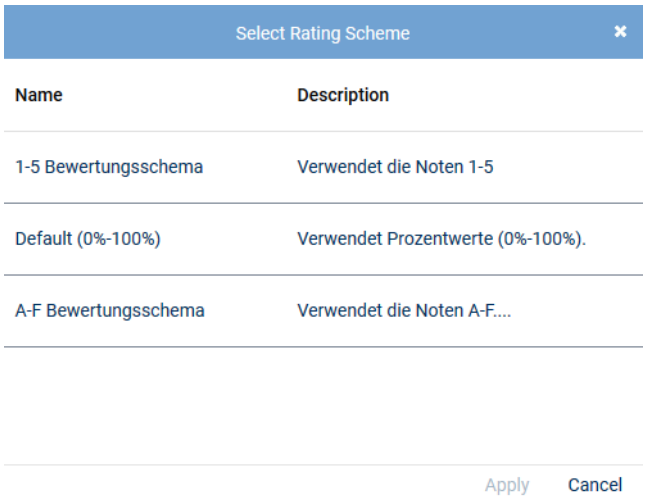


Fig. 13: Select rating scheme

2. Select the respective rating scheme and click on the button *Apply*.

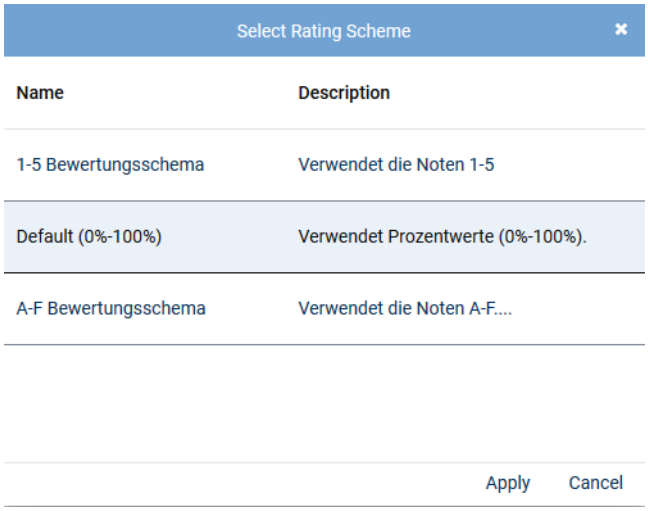


Fig. 14: Select and apply rating scheme

3. To change the rating scheme, confirm the security prompt.

4.9 Add skills

1. Click on the icon *(Skills)*.
   ⇨ The window *Skills* appears.

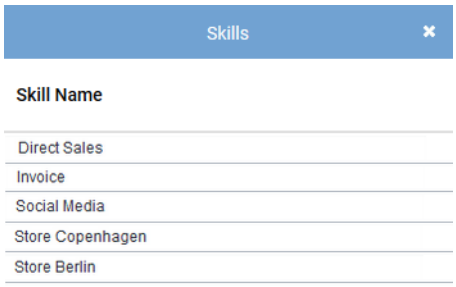


Fig. 15: Add skills

2. Select the respective skill and click on the button *Apply*.
   ⇨ The skill appears as a section in the template.

To be able to use the function *Skills*, the Teleopti CCC connection must have been activated in the application System Configuration in the Clients module.

For information about the configuration of the Teleopti interface refer to the administration manual for tenants *System Configuration - Configuration Teleopti interface*.

4.10 Show preview

This function allows displaying the current template and completing it by way of example. In addition, you can have the result of the applied example displayed.

1. Click on the icon *(Show preview)*.
   ⇨ The window *Preview* appears.

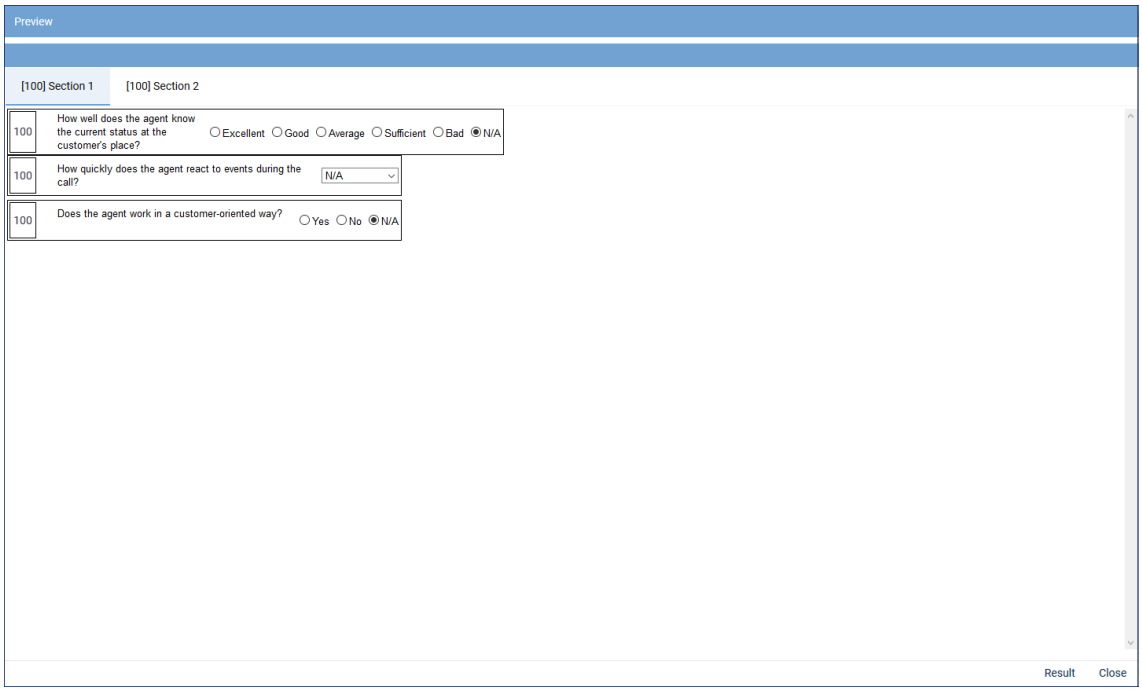


Fig. 16: Preview

2. If you would like to generate an exemplary result, answer all questions in the template. To change the section, click on the name of the section above the template area.
3. To display the evaluation result, click on the button *Result*.
   ⇨ The results of the individual sections are displayed in the fields with the section names.
   ⇨ The overall result is displayed in the line above.

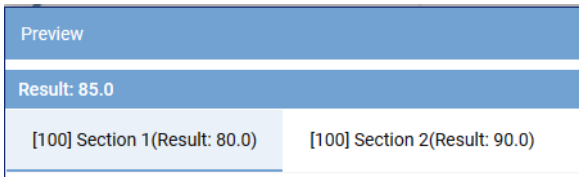


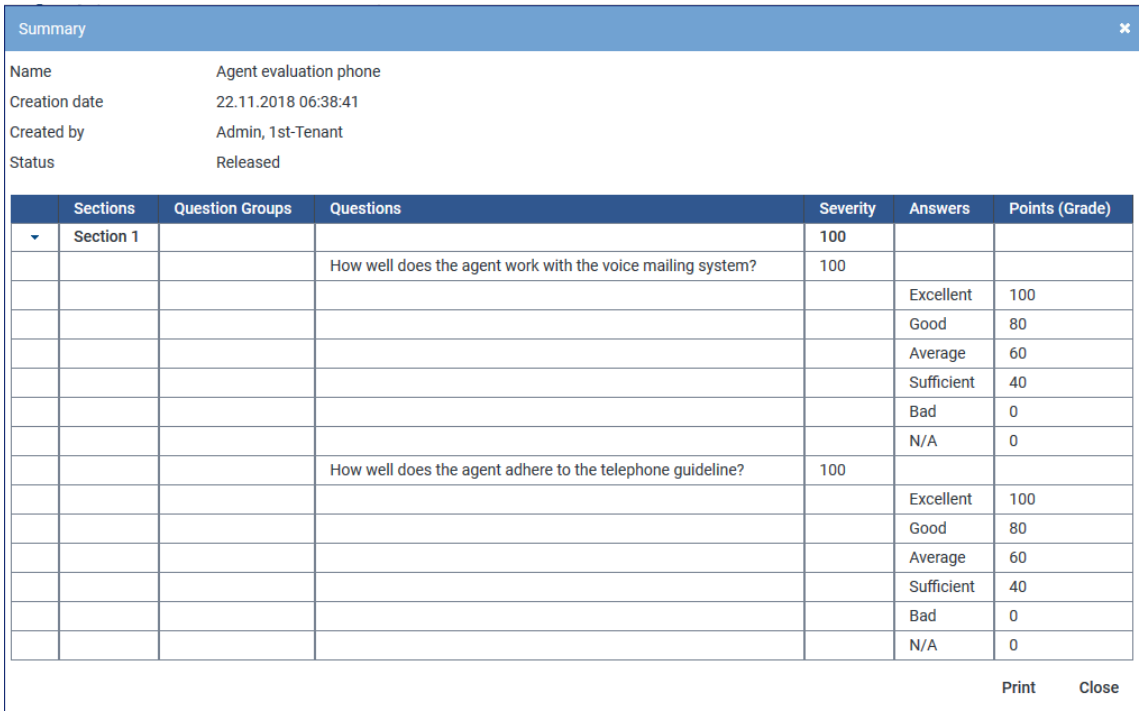
Fig. 17: Preview result

4. To close the preview, click on the button *Close*.

4.11 Show summary

This function allows displaying the essential information of a template in a tabular overview and printing it.

1. Click on the menu item *Evaluations* > *Summary* in the toolbar of the main view.
   ⇨ The window *Summary* appears.



Summary

Name	Agent evaluation phone
Creation date	22.11.2018 06:38:41
Created by	Admin, 1st-Tenant
Status	Released

	Sections	Question Groups	Questions	Severity	Answers	Points (Grade)
▾	Section 1			100		
			How well does the agent work with the voice mailing system?	100		
					Excellent	100
					Good	80
					Average	60
					Sufficient	40
					Bad	0
					N/A	0
			How well does the agent adhere to the telephone guideline?	100		
					Excellent	100
					Good	80
					Average	60
					Sufficient	40
					Bad	0
					N/A	0

Print Close

Fig. 18: Load summary (example)

The following functions are available:

▸	Shows the content of the section.
▾	Hides the content of the section.
Print	Prints the summary.
Close or ✖	Closes the window *Summary*.

5 Element bar

The element bar contains the following tabs:

- Elements

  Contains all elements which can be positioned in the working area.
- Favorites

  Contains elements that have been saved as favorite.

5.1 Tab Elements

The tab *Elements* contains all elements which can be positioned in the working area.

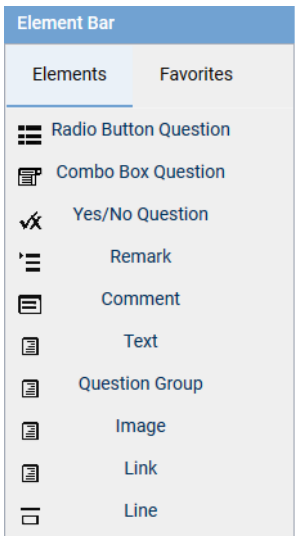


Fig. 19: Element bar (example)

In general, the following elements are available:

Element	Description
Radio Button Question	Question with 5 definable answers. The number of answers can be increased arbitrarily or reduced to 1 answer. The default answers depend on the rating scheme. During the evaluation, you can only select 1 of the answers. See chapter "Element Radio Button Question", p. 21.
Combo Box Question	Question with 5 definable answers. The number of answers can be increased arbitrarily or reduced to 1 answer. The default answers depend on the rating scheme. During the evaluation, you can only select 1 of the answers. See chapter "Element Combo Box Question", p. 21
Yes/No Question	This question can only be answered with *Yes* or *No*. See chapter "Element yes/no question", p. 22.
Remark	List of answers which allows adding remarks to conversations or sections. In this element, there is no quantification. It does not influence the score of the evaluation. See chapter "Element Remark", p. 22.
Comment	In this text field, the user of the template can enter a comment. In this element, there is no quantification. It does not influence the score of the evaluation. See chapter "Element Comment", p. 22.

Element	Description
Text	Text field which allows adding display text. Use this element to create headlines or to mark your template with remarks. See chapter "Element text", p. 22.
Question Group	This element offers the possibility to combine different question elements in one group. See chapter "Element Question Group", p. 22.
Image	This element offers the possibility to insert images. Use this element, e. g. to insert your company logo. See chapter "Element image", p. 22.
Link	This element offers the possibility to insert hyperlinks and mark them with a remark as an instruction for usage. See chapter "Element Link", p. 23.
Line	This element offers the possibility to insert a line. See chapter "Element line", p. 23.
Multiple Choice Question	This question contains several predefined answers. During the evaluation, you can select one, several or all of these answers. See chapter "Element Multiple Choice Question", p. 23
0 - 1 Question	This question has exactly 2 answer possibilities. The answers do not contain text but only numerical values. During the evaluation, you can only select 1 of the answers. This element is only available for customer surveys. See chapter "Element 0 - 1 Question", p. 23.
0 - 9 Question	This question has a maximum of 9 answer possibilities. The answers do not contain text but only numerical values. During the evaluation, you can only select 1 of the answers. This element is only available for customer surveys. See chapter "Element 0 - 9 Question", p. 23.
Customer Comment	In this text field, the user of the template can enter a customer's comment. This element is only available for customer surveys. In this element, there is no quantification. It does not influence the score of the evaluation. See chapter "Element Customer Comment", p. 23.

Depending on the type of the template, all or only a selection of the described elements are displayed.

5.1.1 Element Radio Button Question

By clicking on the button *Radio Button Question*, the following default question is inserted into the working area:

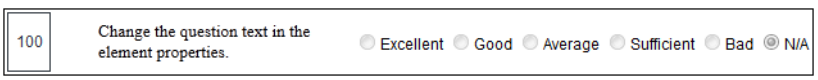


Fig. 20: Radio Button Question

5.1.2 Element Combo Box Question

By clicking on the button *Combo Box Question*, the following default question is inserted into the working area:

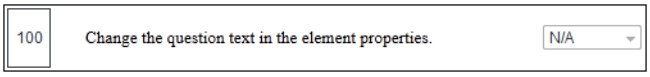


Fig. 21: Combo Box Question

5.1.3 Element yes/no question

By clicking on the button *Yes/No Question*, the following default question is inserted into the working area:

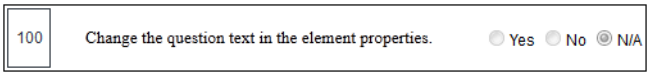


Fig. 22: Yes/No Question

5.1.4 Element Remark

By clicking on the button *Remark*, the following element is inserted into the working area:

Fig. 23: Remark

5.1.5 Element Comment

By clicking on the button *Comment*, the following element is inserted into the working area:

Fig. 24: Comment

5.1.6 Element text

By clicking on the button *Text*, the following element is inserted into the working area:

Fig. 25: Text

5.1.7 Element Question Group

By clicking on the button *Question Group*, the following element is inserted into the working area:

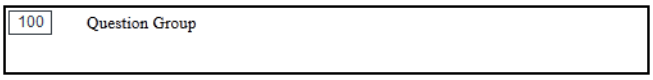


Fig. 26: Question Group

5.1.8 Element image

By clicking on the button *Image*, the following element is inserted into the working area:

Fig. 27: Image

5.1.9 Element Link

By clicking on the button *Link*, the following element is inserted into the working area:

Fig. 28: Link

5.1.10 Element line

By clicking on the button *Line*, the following element is inserted into the working area:

Fig. 29: Line

5.1.11 Element Multiple Choice Question

This element is only available for quiz templates.

By clicking on the button *Multiple Choice Question*, the following default question is inserted into the working area:

Fig. 30: Multiple Choice Question

5.1.12 Element 0 - 9 Question

This element is only available for customer surveys.

By clicking on the button *0 - 9 Question*, the following default question is inserted into the working area:

Fig. 31: 0 - 9 Question

5.1.13 Element 0 - 1 Question

This element is only available for customer surveys.

By clicking on the button *0 - 1 Question*, the following default question is inserted into the working area:

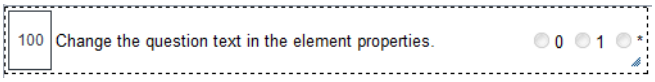


Fig. 32: 0 - 1 Question

5.1.14 Element Customer Comment

This element is only available for customer surveys.

By clicking on the button *Customer Comment*, the following element is inserted into the working area:

Fig. 33: Customer Comment

5.2 Tab Favorites

In the tab *Favorites*, all elements are displayed which have been saved as favorites.

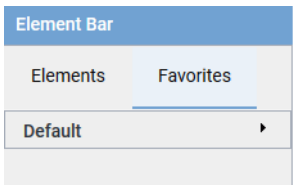


Fig. 34: Tab Favorites

Every element which has been pasted into the current template can be saved as favorite. The favorites allow you to save frequently used elements, including the configured element properties, and insert them quickly and easily into other templates.

5.2.1 Save element as favorite

1. In the working area, click on the element you would like to save as favorite.
2. Click on the button *Save as Favorite* in the detail view.

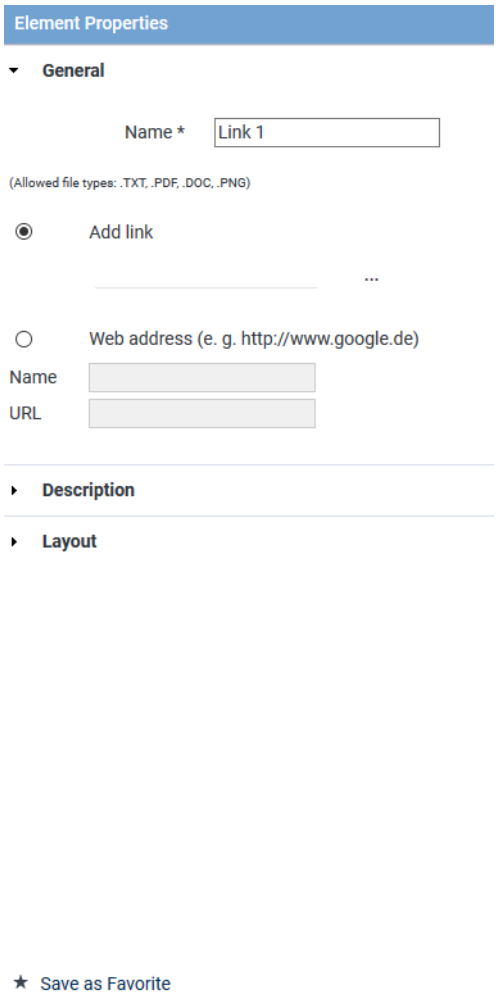


Fig. 35: Save element as favorite (example)

3. Select the category you would like to save the element in.

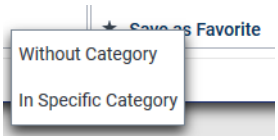


Fig. 36: Select favorite category

- *Without Category*

  The element is automatically saved in the category *Standard*.
- *In Specific Category*

  You can select in which category you would like to save the element, see chapter "Save favorite in specific category", p. 25.

5.2.1.1 Save favorite in specific category

1. Click on the option *In Specific Category*.

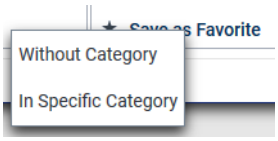


Fig. 37: Select favorite category

2. On the left of the following window, select the respective category.

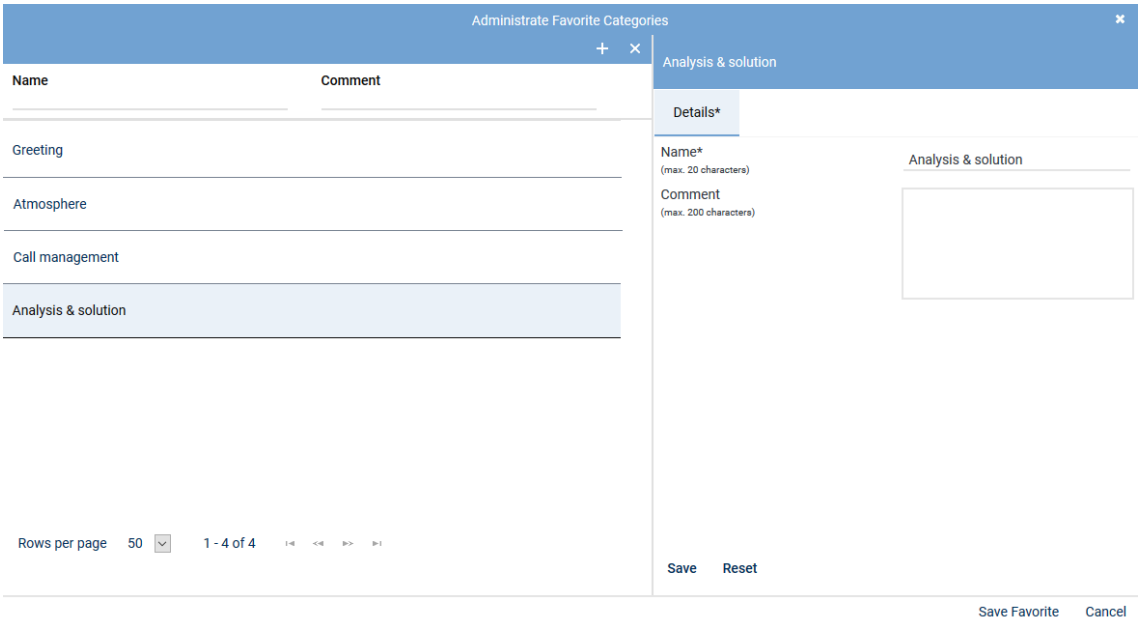


Fig. 38: Select favorite category

3. To save the favorite in the selected category, click on the button *Save Favorite*.
   To discard the selection and close the window, click on the button *Cancel*.

If no appropriate category exists, you can create a new category (see chapter "Create favorite category", p. 25).

5.2.1.2 Create favorite category

1. Click on the button *Save as Favorite* and select the option *In Specific Category*.

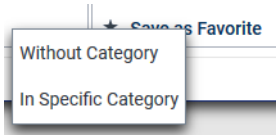


Fig. 39: Select favorite category

2. To create a new favorite category, click on the icon + *(Create new favorite category)*.

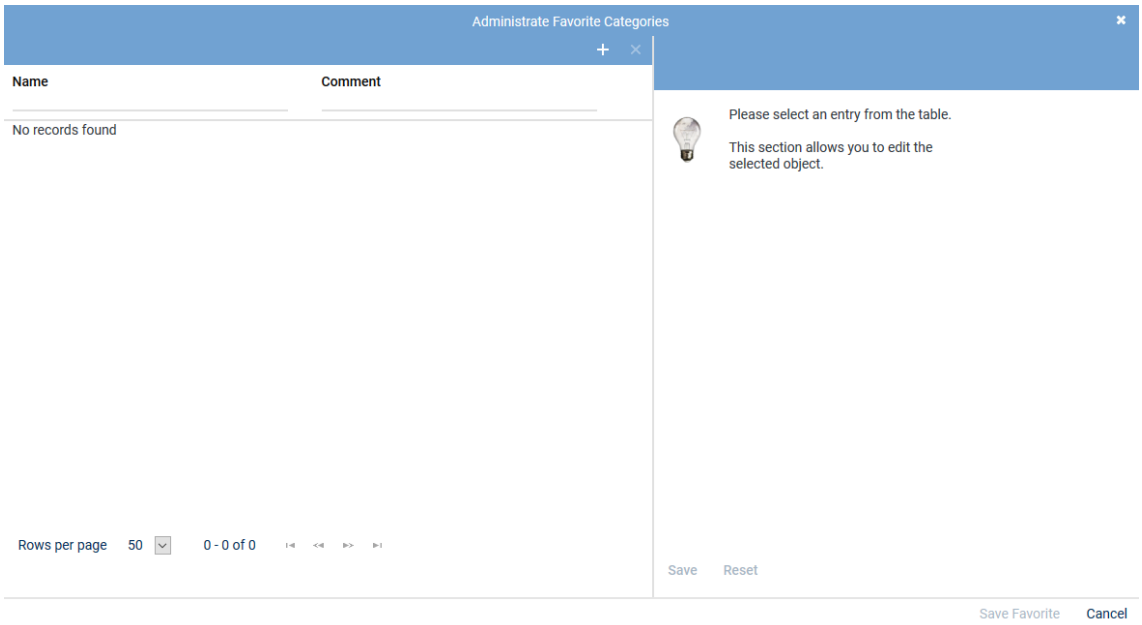


Fig. 40: Create new favorite category

3. Enter a name for the favorite category in the entry field *Name*.
4. If required, enter a comment for the favorite category in the entry field *Comment*.
5. To save the new favorite category, click on the button *Save*.
   To discard the changes, click on the button *Reset*.

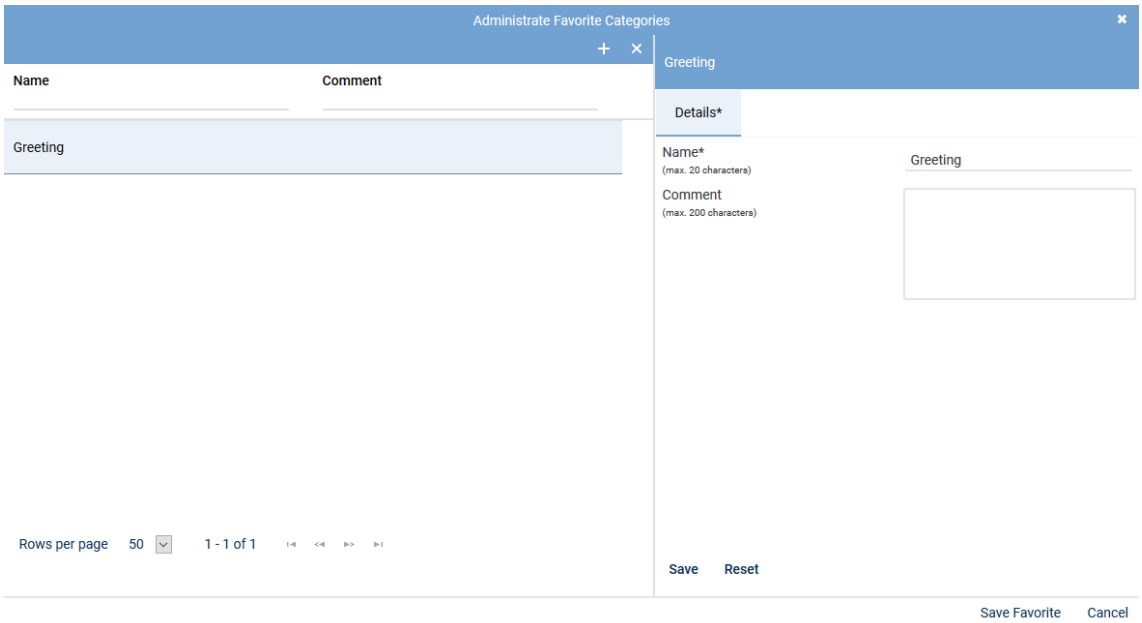


Fig. 41: Enter new favorite category and save

6. To delete a favorite category, select the respective favorite category, click on the icon × *(Delete selected favorite category)* and confirm the security prompt.

⇨ The selected favorite category is deleted.

5.2.1.3 Delete favorite category

1. Click on the button *Save as Favorite* and select *In Specific Category*.

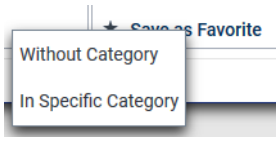


Fig. 42: Select favorite category

2. Select the favorite category you would like to delete from the list and click on the icon ✕ *(Delete selected favorite category)*.

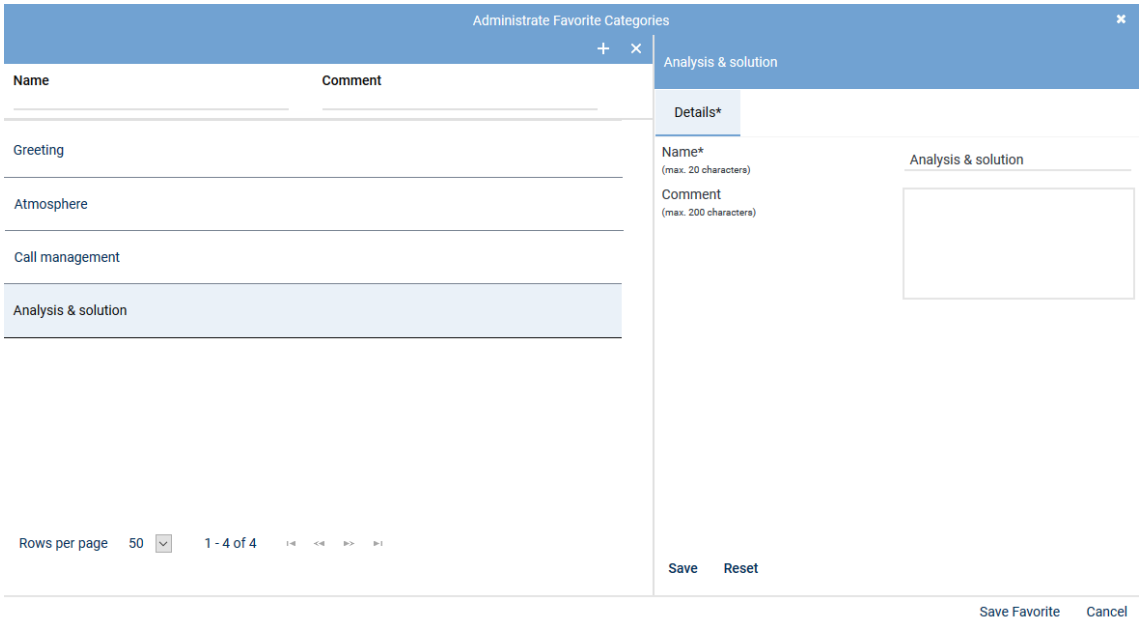


Fig. 43: Delete favorite category

3. Confirm the security prompt to define details of the delete process.

Yes	The content of the category is moved to the standard category before it is deleted.
No	The category and the content of the category are deleted.
Cancel	The delete process is canceled.

6 Element browser

In the element browser, all sections and their contained elements are listed.

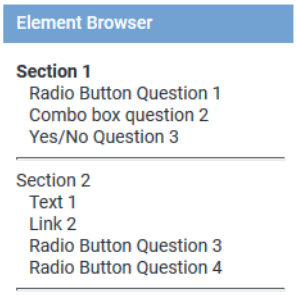


Fig. 44: Element Browser (example)

The element browser allows selecting an element directly from any section.

6.1 Select element

1. In the element browser, click on the name of the element.

⇨ The respective section which contains the element is displayed in the working area.

⇨ In the working area, the respective element has been selected.

7 Element properties

In the window *Element Properties*, detailed information about the elements is displayed.

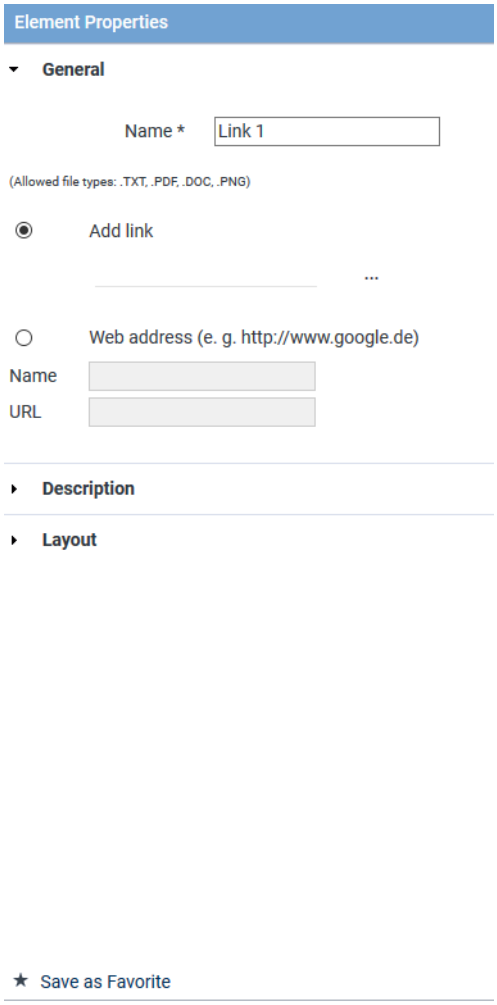


Fig. 45: Element Properties (example)

The element properties allow you to design each element individually (see chapter "Element bar", p. 20).

The available element properties depend on the particular element.

7.1 General

The element property *General* is available in all elements. Depending on the selected element, besides the name you can add a link or an image for instance.

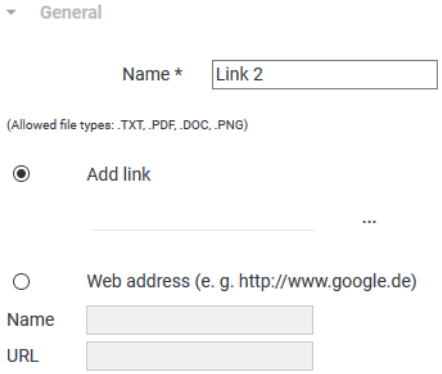


Fig. 46: Element property *General* (example by reference to the element *Link*)

Depending on the element you are editing, the following individual settings can be configured:

Name	Enter a name for the element. This name is displayed in the element browser and used as favorite name.
Question ID	Enter an ID for the question. The question ID can be the same for several elements. In a report, all answers to questions with the same ID can be displayed.
Question is optional	Define whether the question is optional or not. ☑ = The question is optional. An answer is not mandatory. ☐ = The question is not optional. An answer is mandatory.
Activate note	Define whether a note field is supposed to be added to the question. ☑ = Note field is added. ☐ = Note field is not added. In the template, the note field is displayed by the icon. By clicking on this icon, the user can open the note field and enter a note.
Add audio	Insert an audio file here which contains the question (see chapter "Upload and add new audio file", p. 30). Allowed file types: .mp3, .mp4, .wav Maximum file size: 5 MB
Add link	Select the link to an uploaded file (see chapter "Add link", p. 33). Allowed file types: .txt, .pdf, .doc, .png Maximum file size: 5 MB
Web address	Enter a link to a web address (see chapter "Add web address", p. 37).
Add image	Select the image you would like to insert (see chapter "Add image from the file list", p. 40). Allowed file types: .jpg, .png, .gif Maximum file size: 5 MB
Background image	Define whether the image is supposed to be displayed as background image. ☑ = Image is displayed in the background. ☐ = Image is displayed in the foreground.

7.1.1 Upload and add new audio file

1. Click on the button ··· .

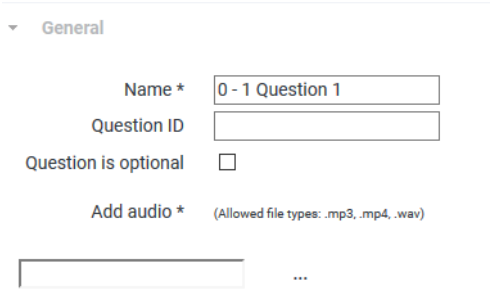


Fig. 47: Add audio file

2. Click on the icon + *(Add file)*.

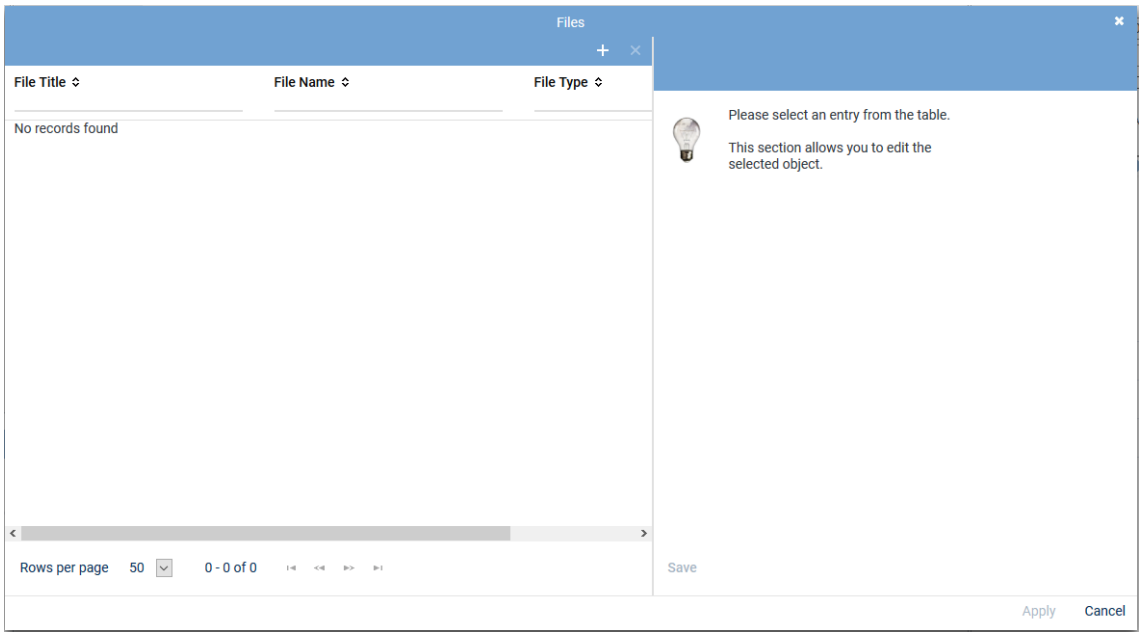


Fig. 48: Add file

3. Click on the button *Upload File*.

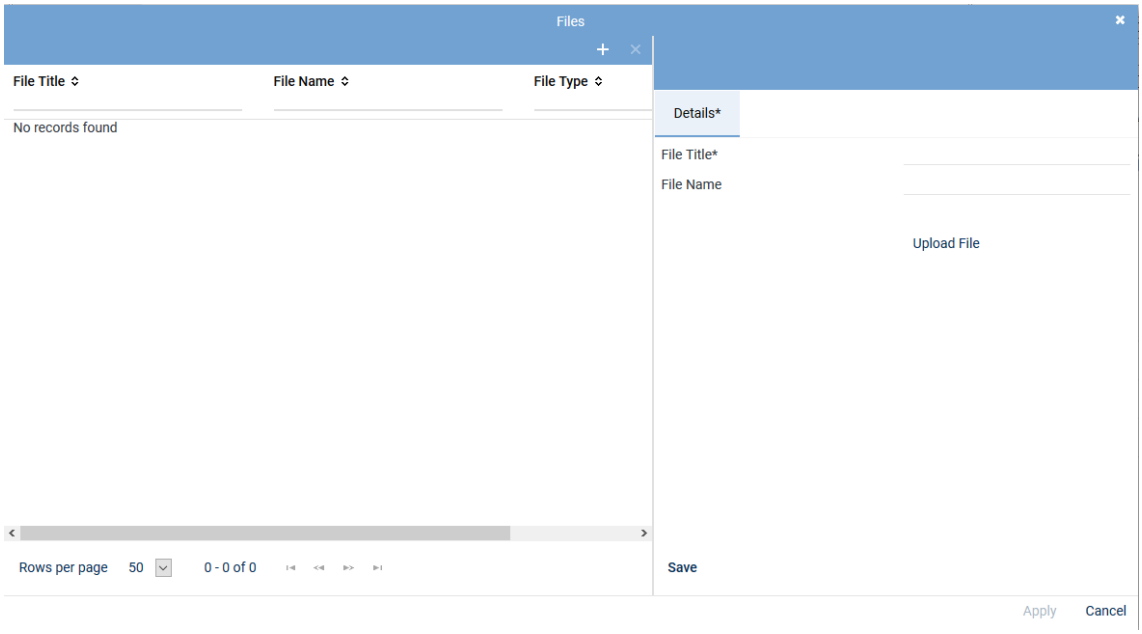


Fig. 49: Upload File

The audio file appears in the element on the right side as icon.

7.1.2 Add audio file from the file list

1. Click on the button ... .

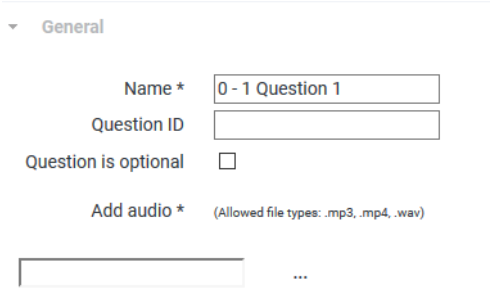


Fig. 50: Add audio file

2. Select a file from the list and click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

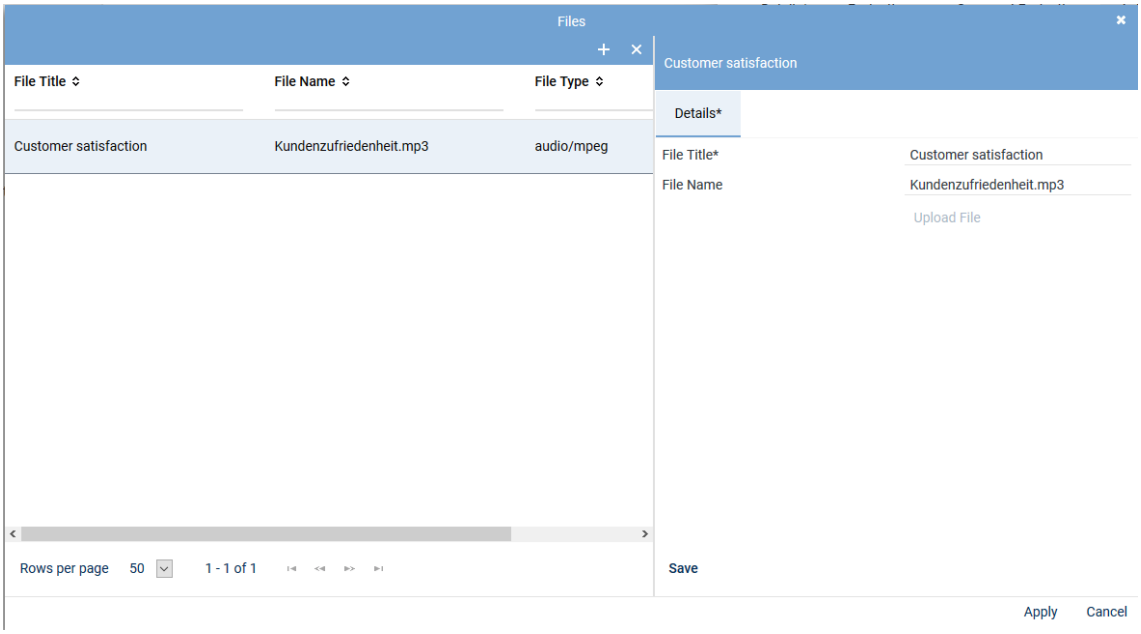


Fig. 51: Apply file to the element

The audio file appears in the element on the right side as icon.

7.1.3 Delete audio file from the file list

1. Click on the button ... .

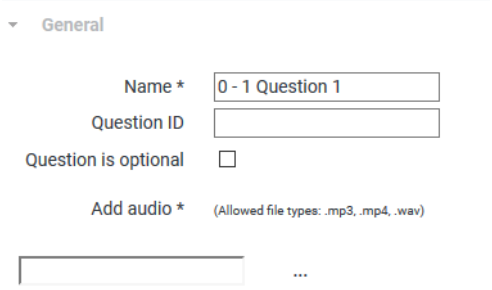


Fig. 52: Add audio file

2. Select the file you would like to delete and click on the icon *(Delete)*.

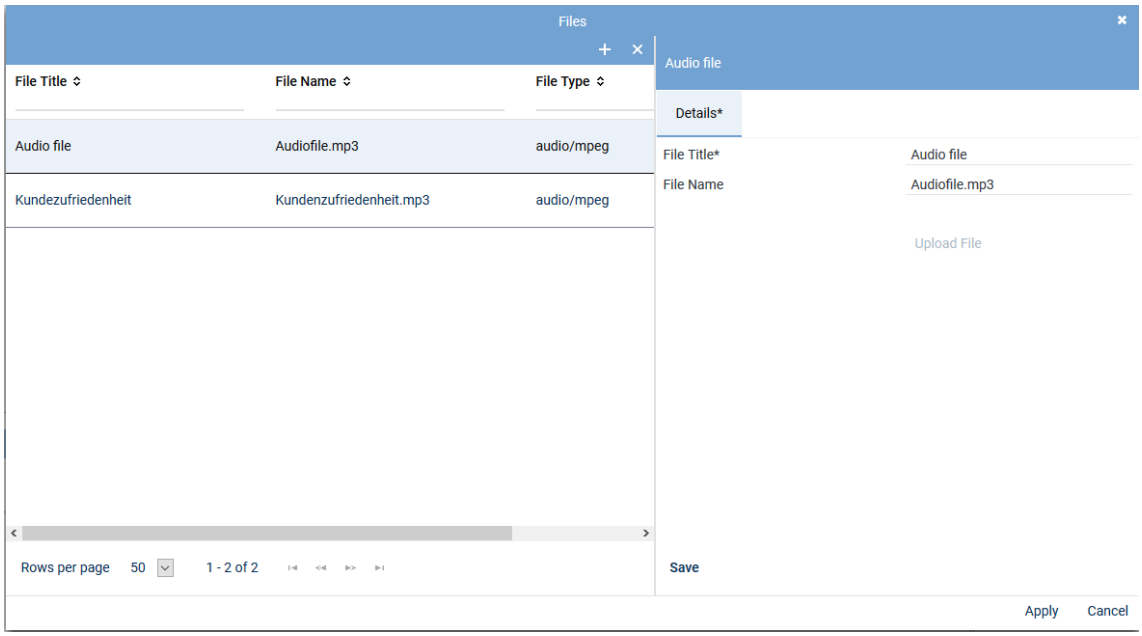


Fig. 53: Delete file

If you confirm the security prompt, the entry will be deleted irrecoverably. Even if you close the window by clicking on the button *Cancel* afterwards, you cannot undo the deletion procedure.

3. To close the window, click on the icon × *(Delete)*.

7.1.4 Add link

1. Activate the option *Add link*.

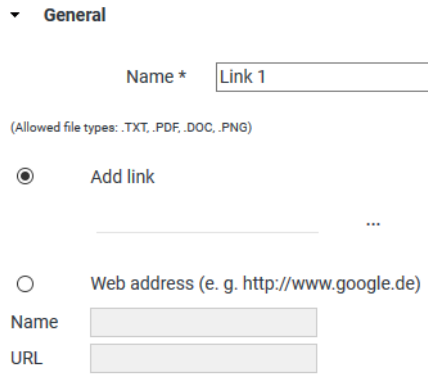


Fig. 54: Add link

2. Click on the button ... .
3. Click on the icon + *(Add file)*.

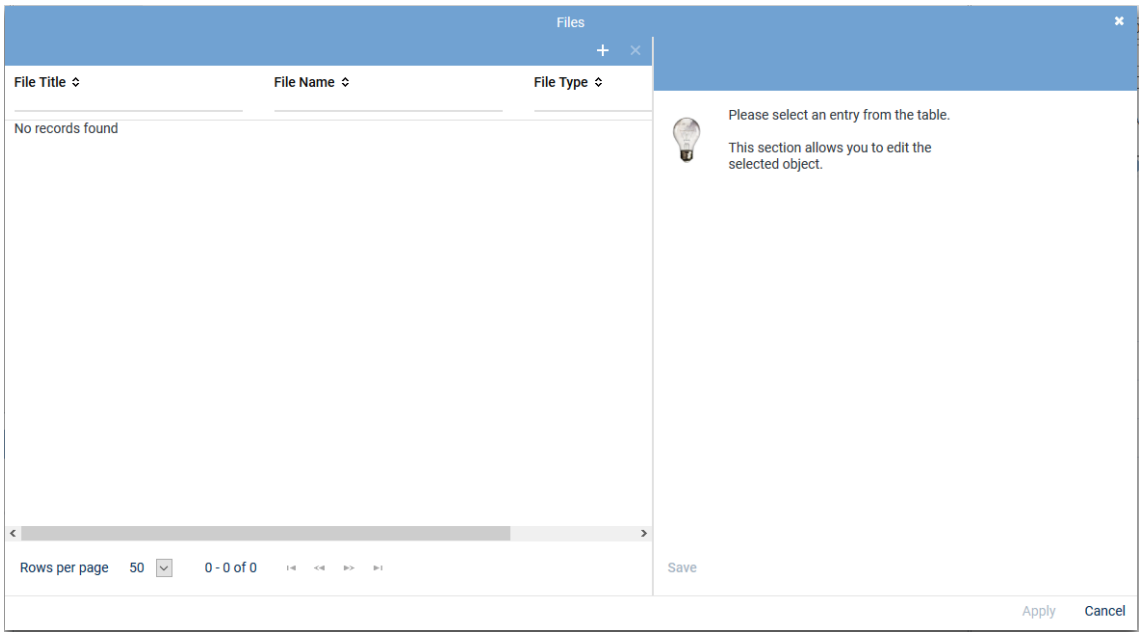


Fig. 55: Add file

4. Click on the button *Upload File*.

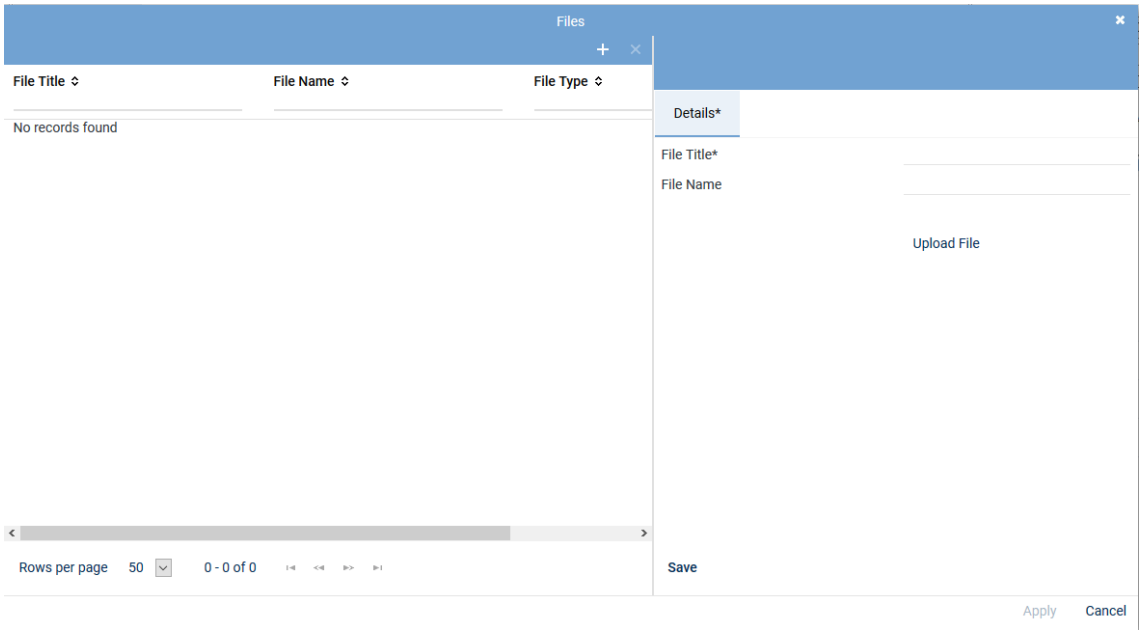


Fig. 56: Upload File

5. Click on the button *Choose File*.

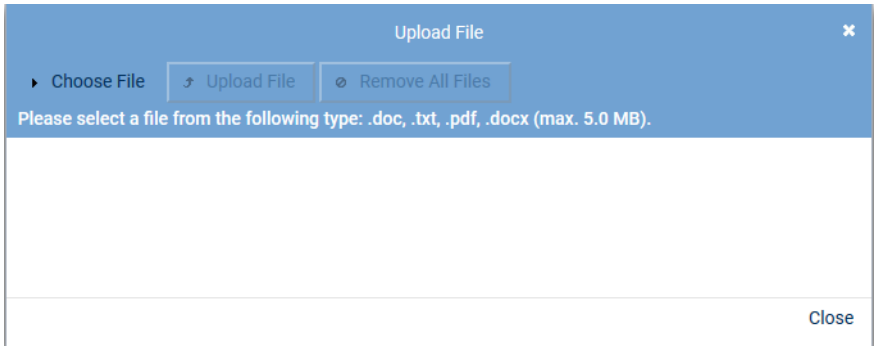


Fig. 57: Choose file

6. Select the file via the Explorer and click on the button *Open*.

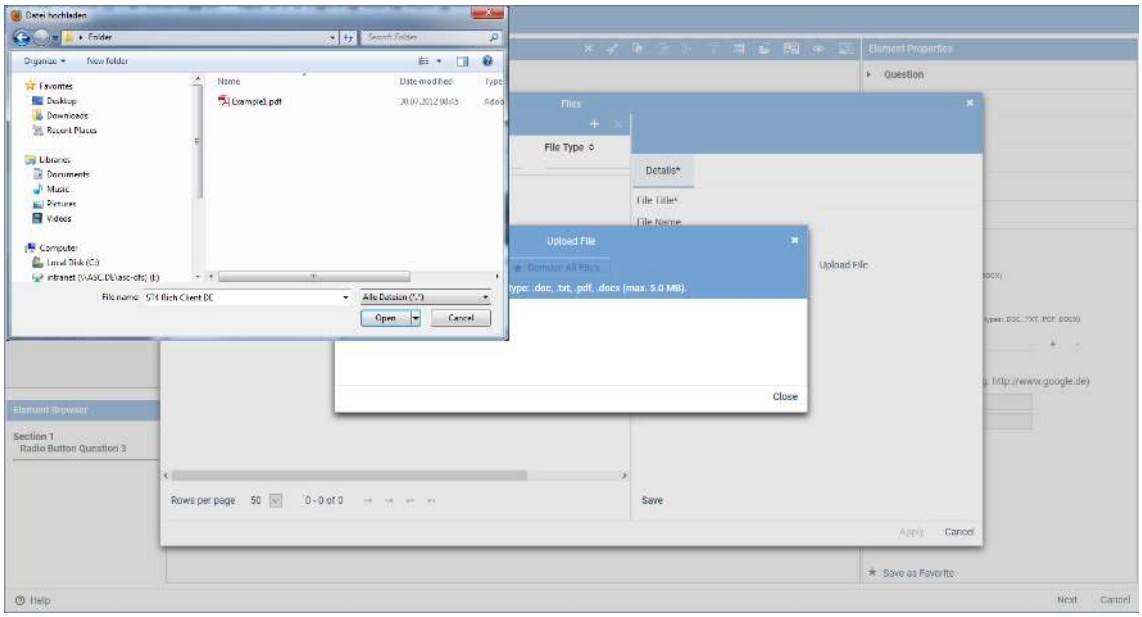


Fig. 58: Open file

7. To upload the file, click on the button *(Upload file)*.
   If you would like to remove the selected file and select a different file, click on the button *(Remove file)*.

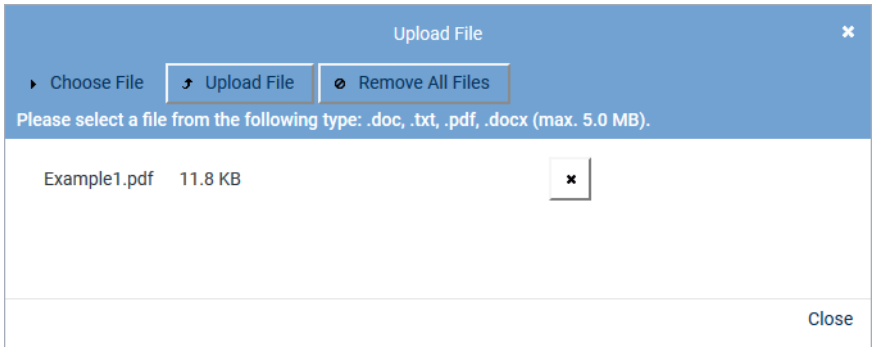


Fig. 59: Upload File

8. To save the uploaded file in the file list, click on the button *Save*.

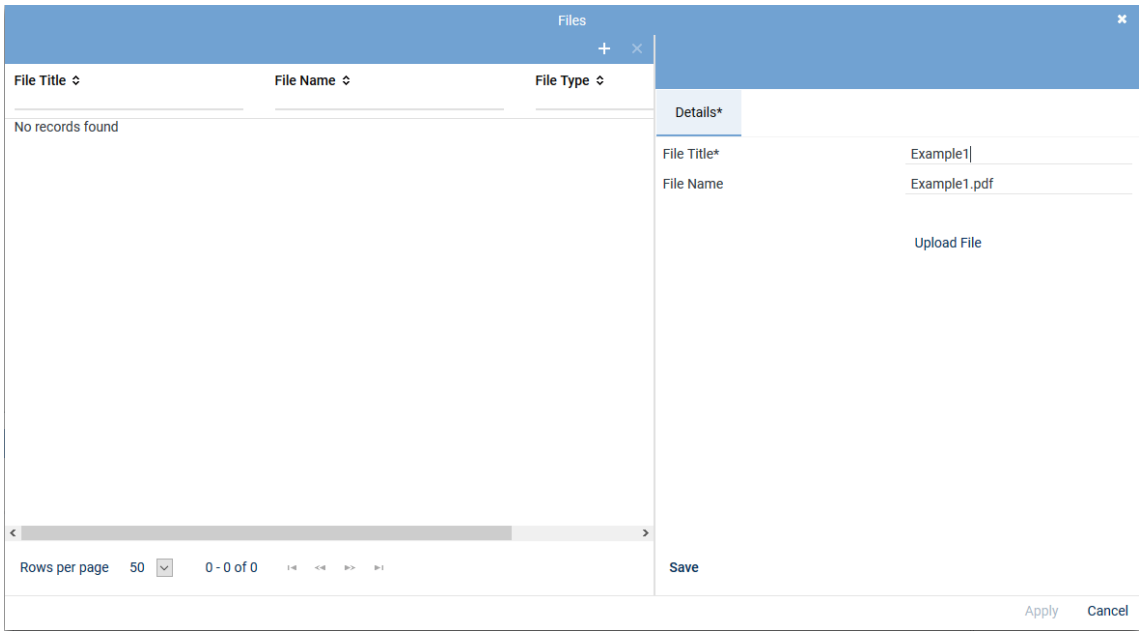


Fig. 60: Save file in file list

9. To apply the file to the element, click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

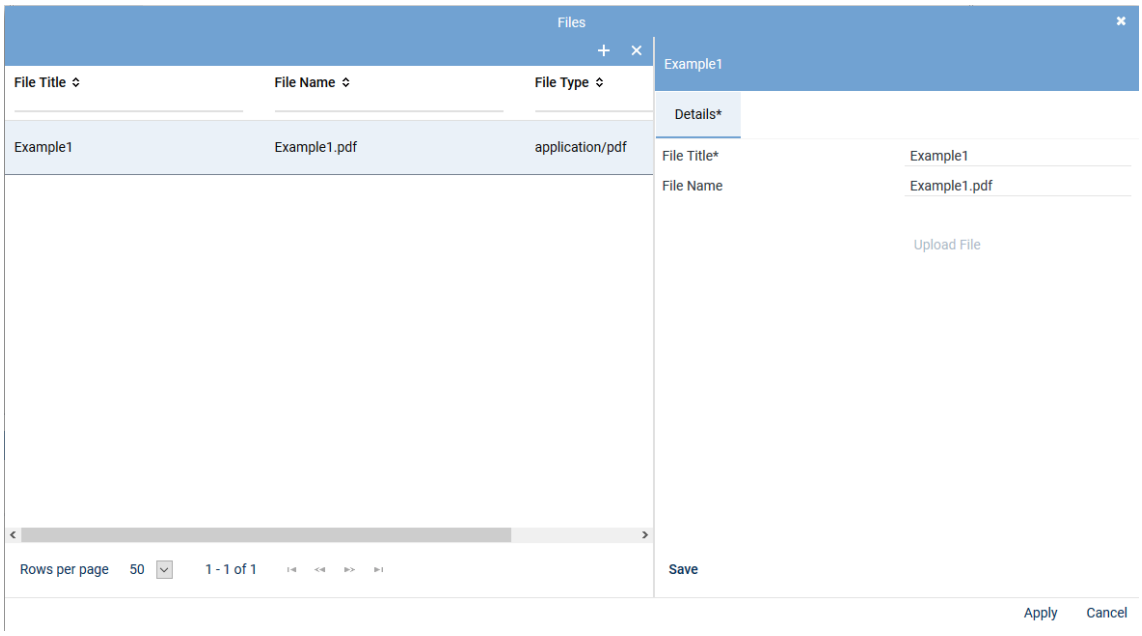


Fig. 61: Apply file to the element

7.1.5 Add link from the file list

1. Activate the option *Add link*.

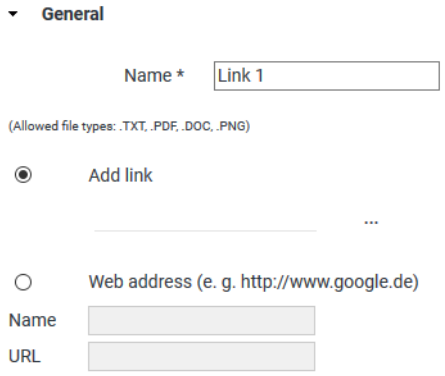


Fig. 62: Add link

2. Click on the button ... .
3. Select a file from the list and click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

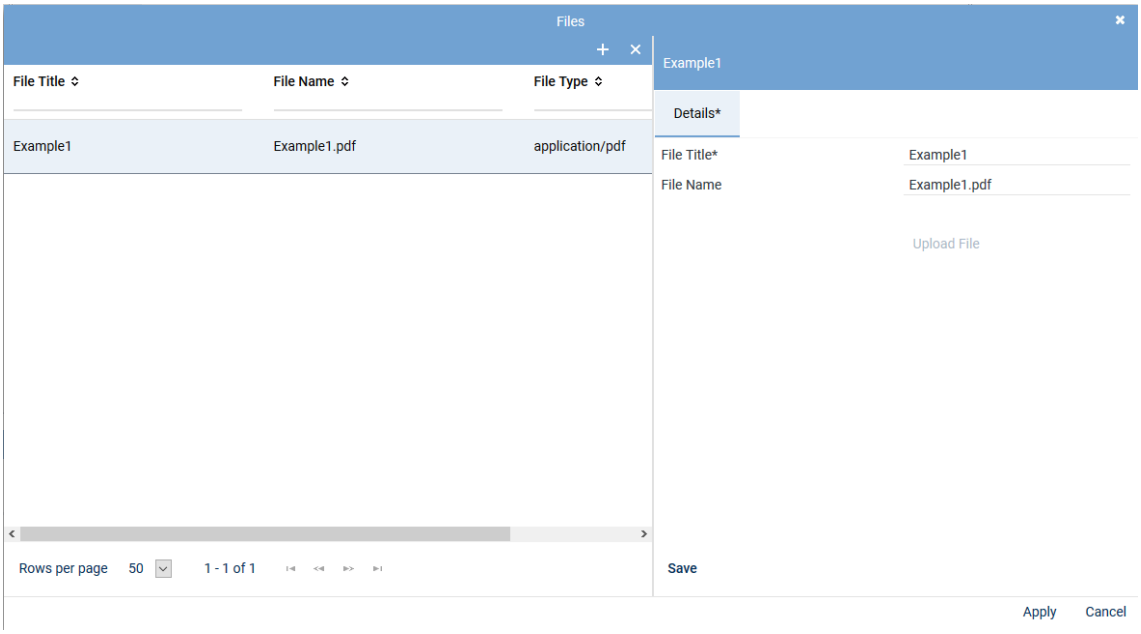


Fig. 63: Apply file from file list

7.1.6 Add web address

1. Activate the option *Web address*.

Fig. 64: Add web address

2. In the field *Title*, enter the name which is supposed to be displayed in the element. If you do not enter a text in this field, the web address will be displayed.

3. In the entry field *URL*, enter the web address (e. g. http://www.google.de).

7.1.7 Upload and add new image

1. Click on the button ··· .

Fig. 65: Add image

2. Click on the icon + *(Add file)*.

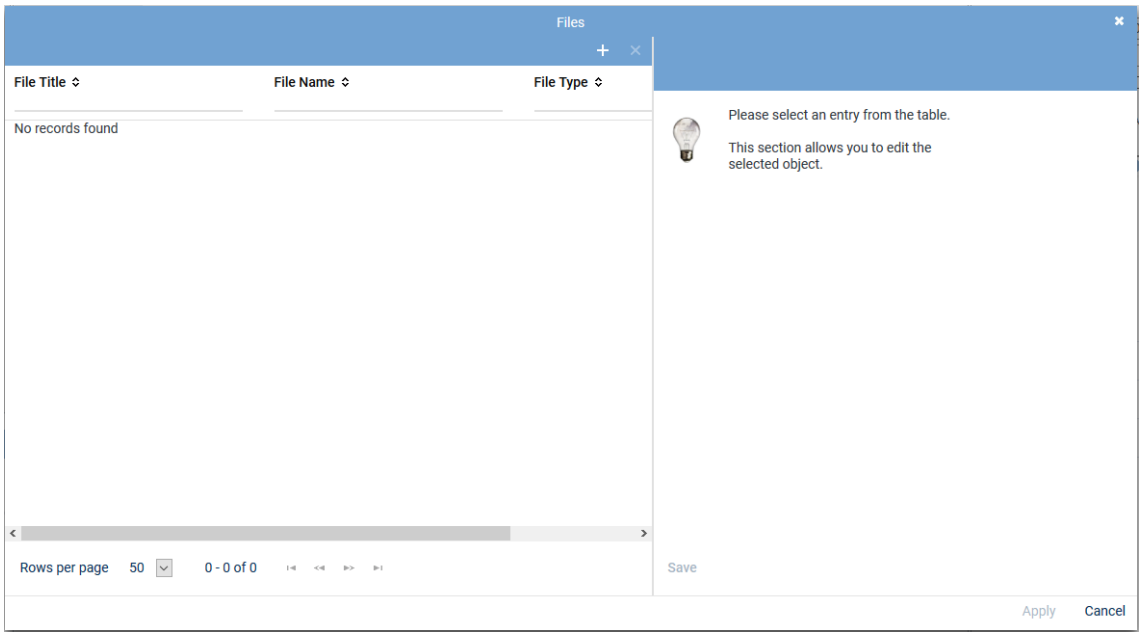


Fig. 66: Add file

3. Click on the button *Upload File*.

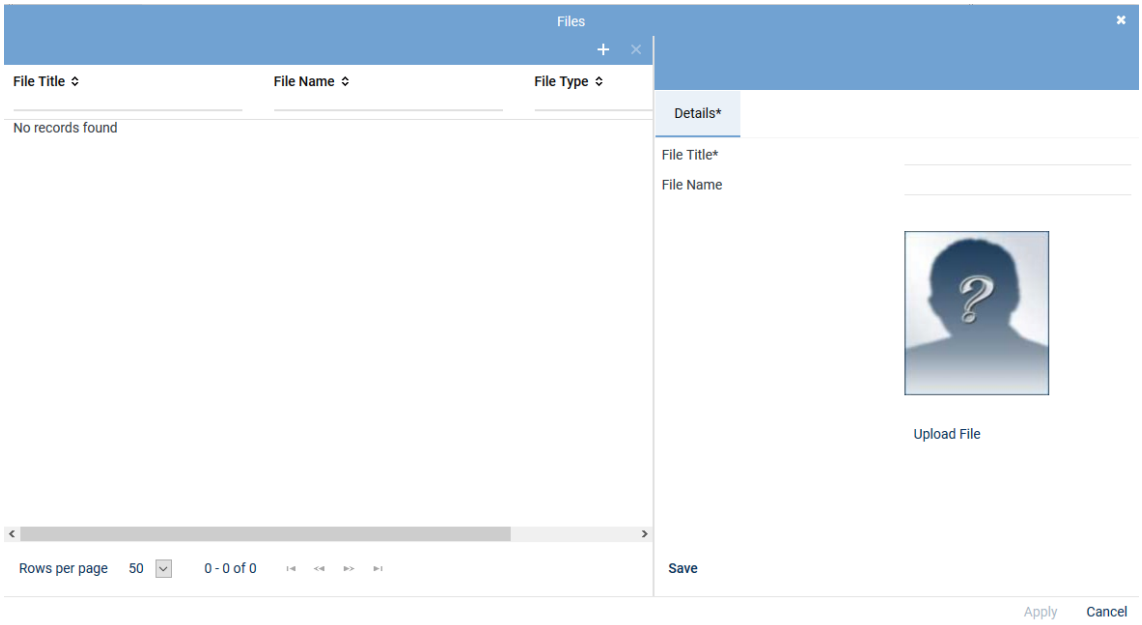


Fig. 67: Upload File

4. Click on the button *Choose File*.

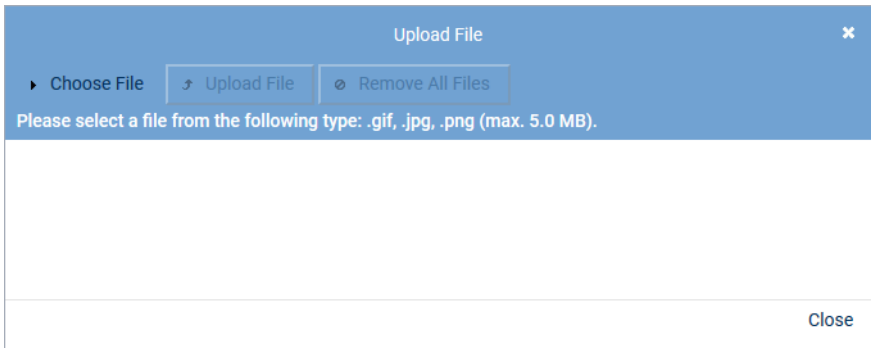


Fig. 68: Choose file

5. Select the file via the Explorer and click on the button *Open*.

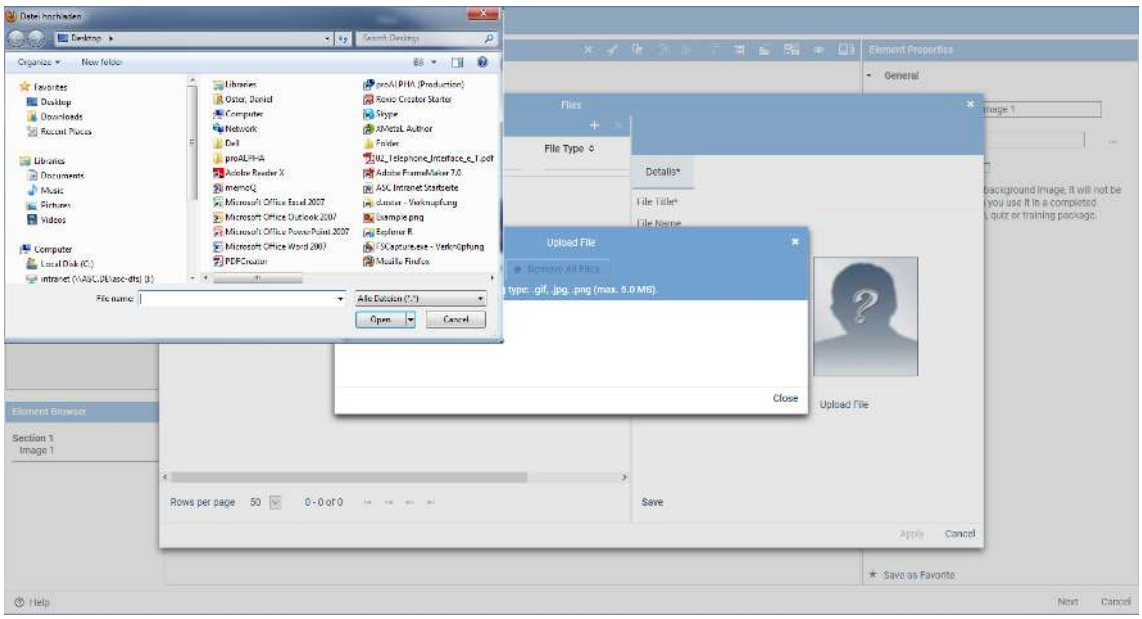


Fig. 69: Open file

6. To upload the file, click on the button *(Upload file)*.
   If you would like to remove the selected file and select a different file, click on the button *(Remove file)*.

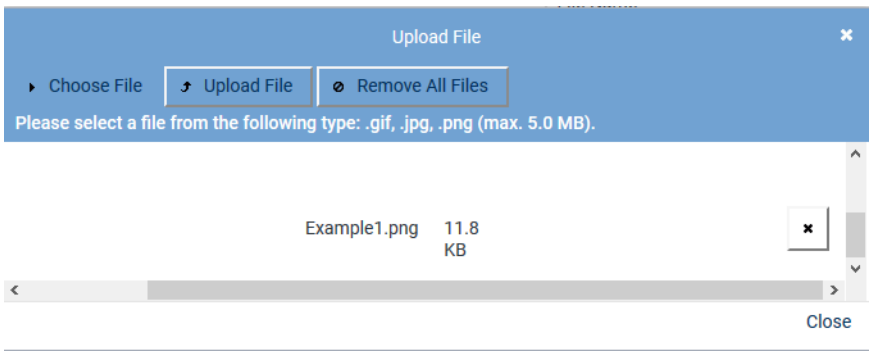


Fig. 70: Upload File

7. To save the uploaded file in the file list, click on the button *Save*.

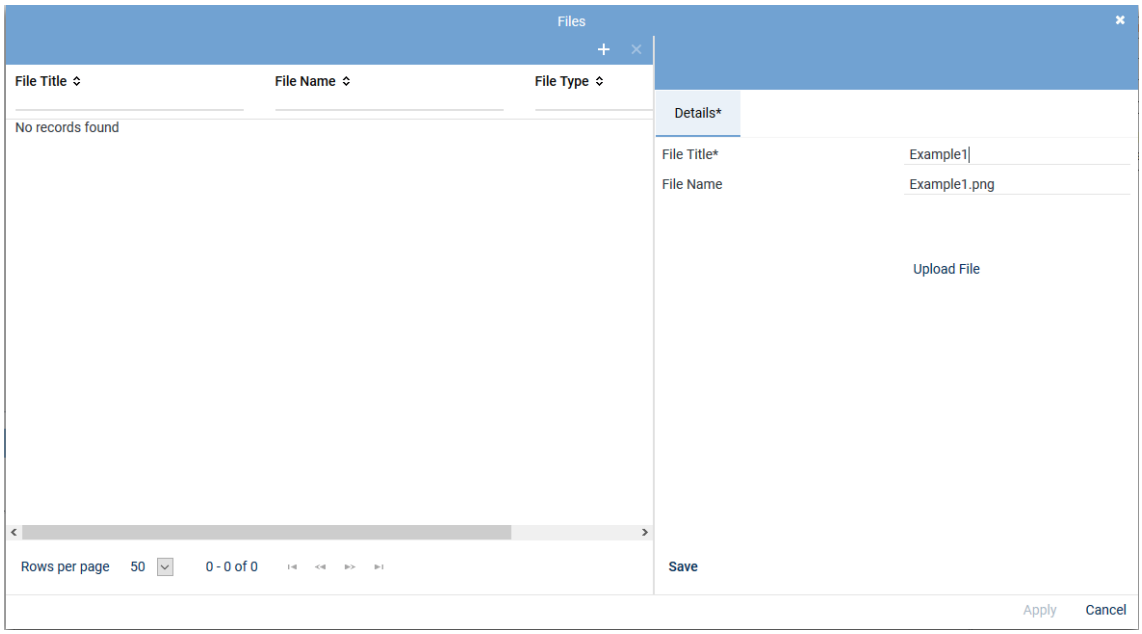


Fig. 71: Save file in file list

8. To apply the file to the element, click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

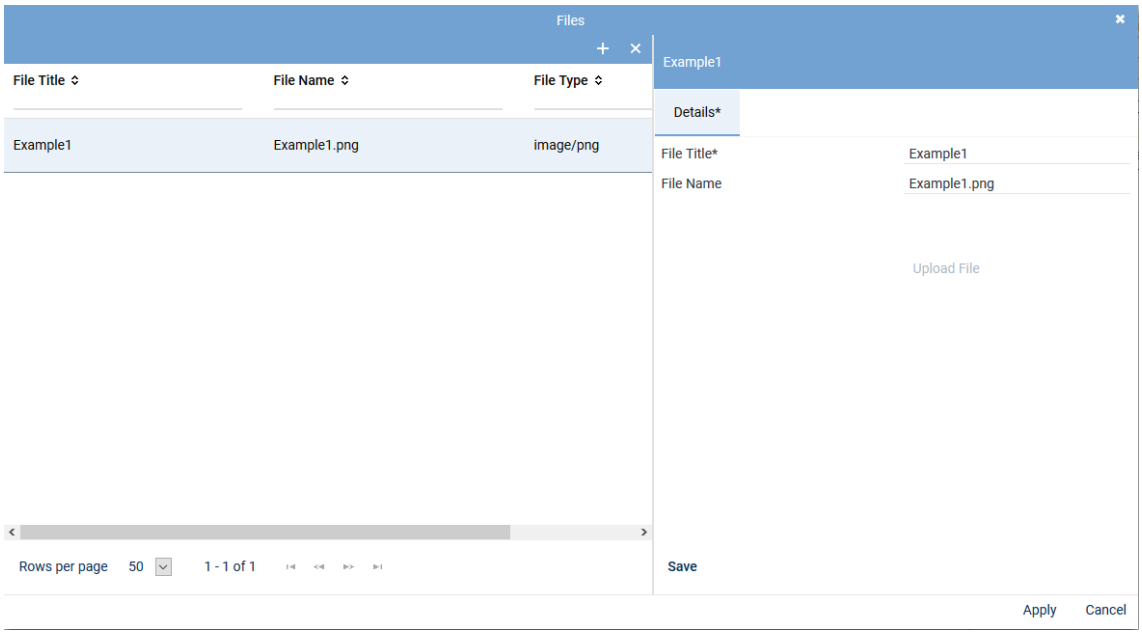


Fig. 72: Apply saved image

7.1.8 Add image from the file list

1. Click on the button ··· .

Fig. 73: Add image

2. Select a file from the list and click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

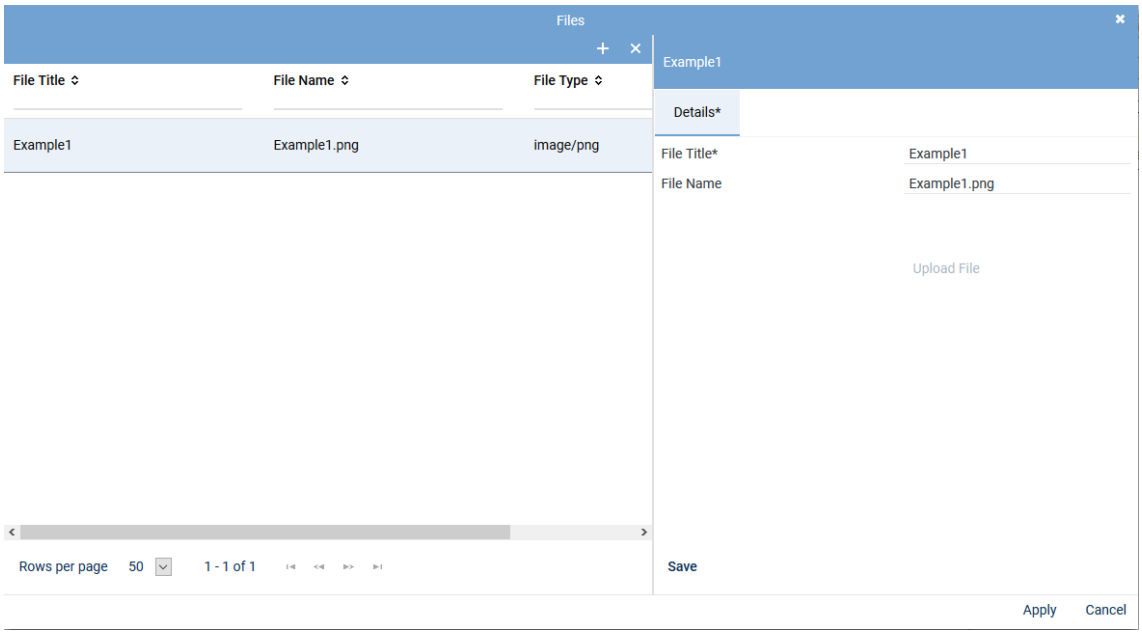


Fig. 74: Apply saved image

7.2 Attachment

The element property *Attachment* allows you to attach a file, a link or a web address.

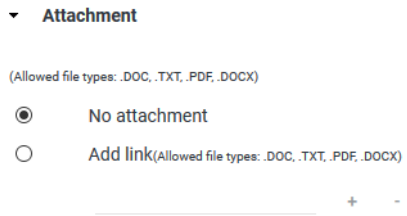


Fig. 75: Element property *Attachment* (example by reference to the element *Radio Button Question*)

Allowed file types: .txt, .pdf, .doc, .docx

Maximum file size: 5 MB

7.2.1 Upload and add new file as attachment

1. Click on the button + *(Add attachment)*.

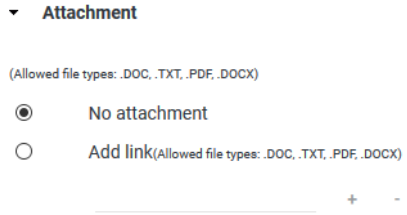


Fig. 76: Element properties Attachment

2. Click on the icon + *(Add file)*.

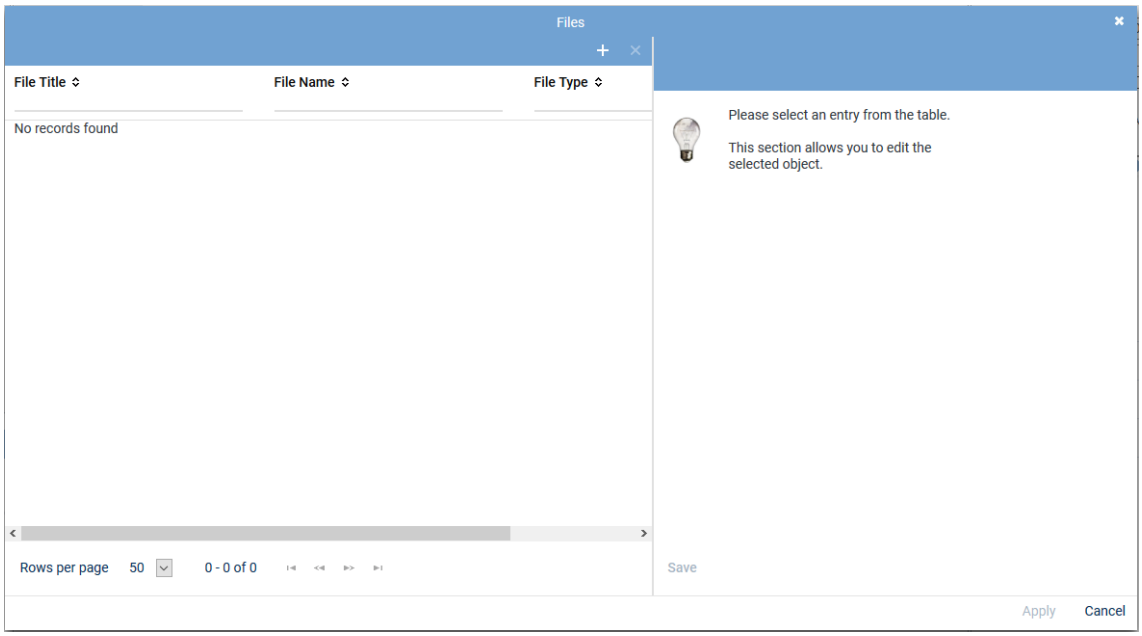


Fig. 77: Add file

3. Click on the button *Upload File*.

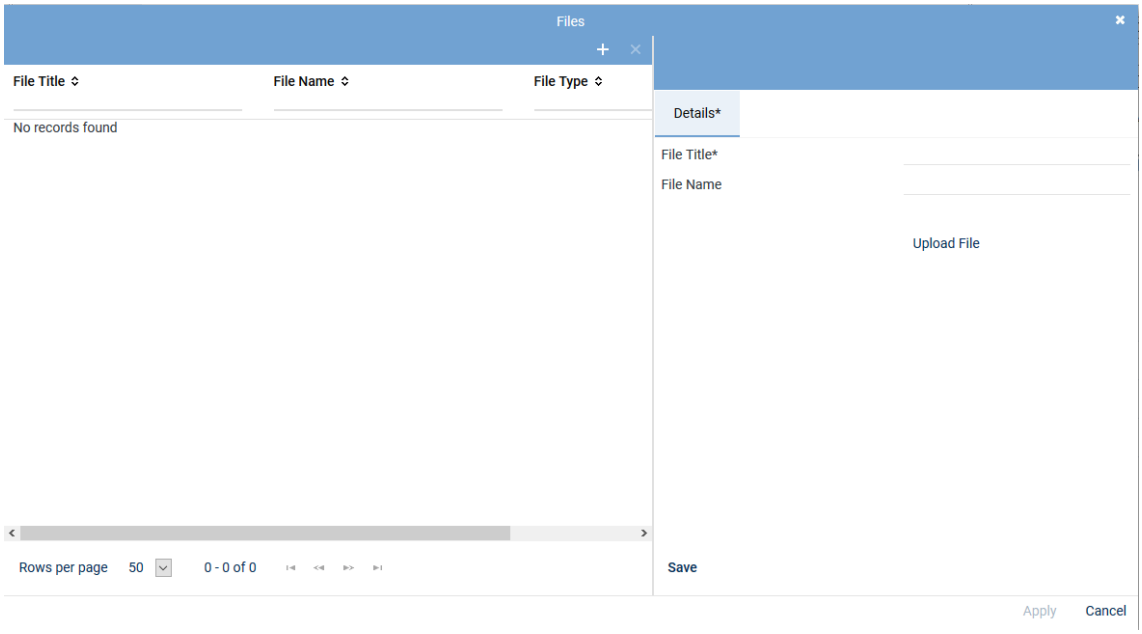


Fig. 78: Upload File

4. Click on the button *Choose File*.

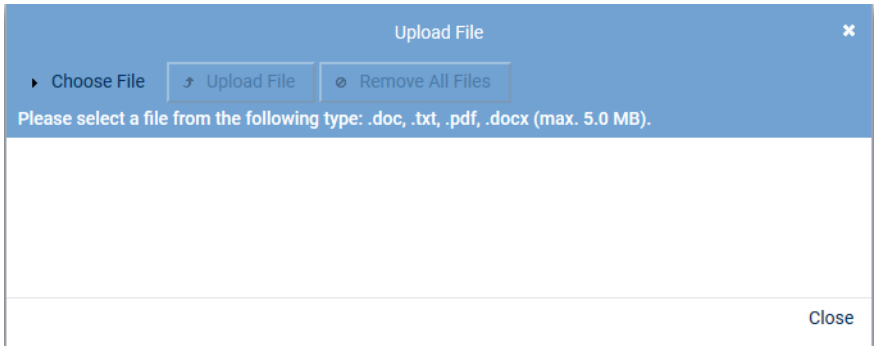


Fig. 79: Choose file

5. Select the file via the Explorer and click on the button *Open*.

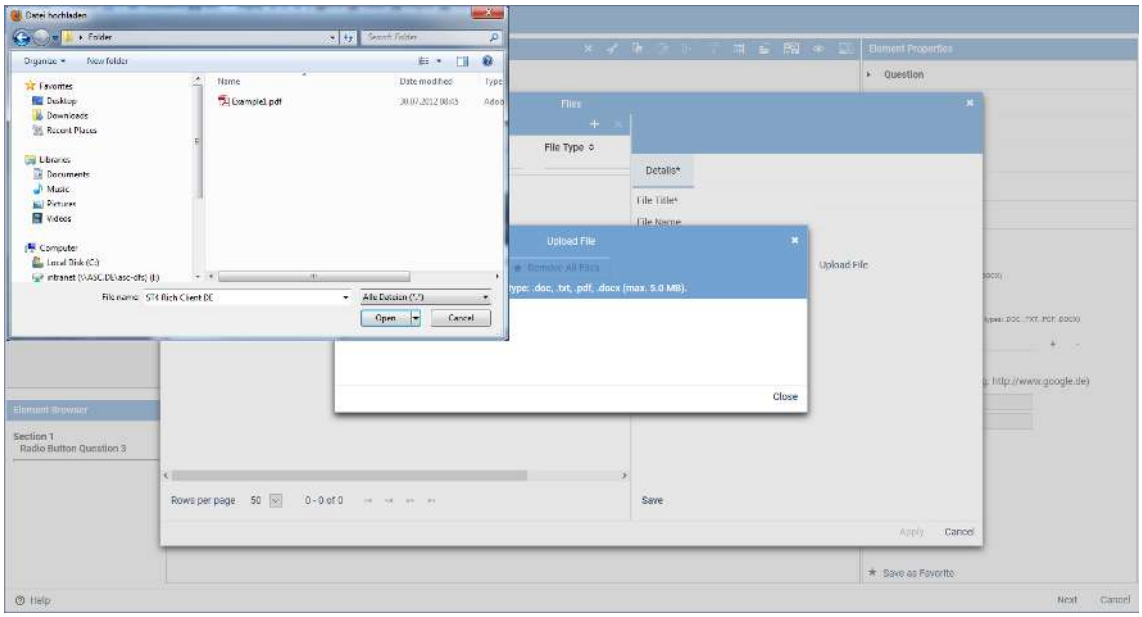


Fig. 80: Open file

6. To upload the file, click on the button *(Upload file)*.
   If you would like to remove the selected file and select a different file, click on the button *(Remove file)*.

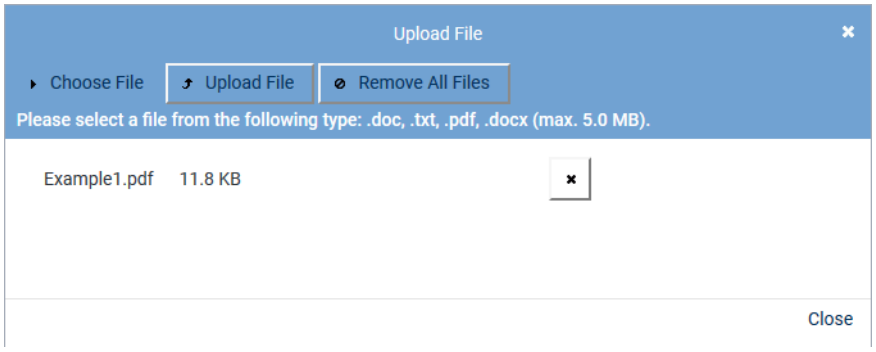


Fig. 81: Upload File

7. To save the uploaded file in the file list, click on the button *Save*.

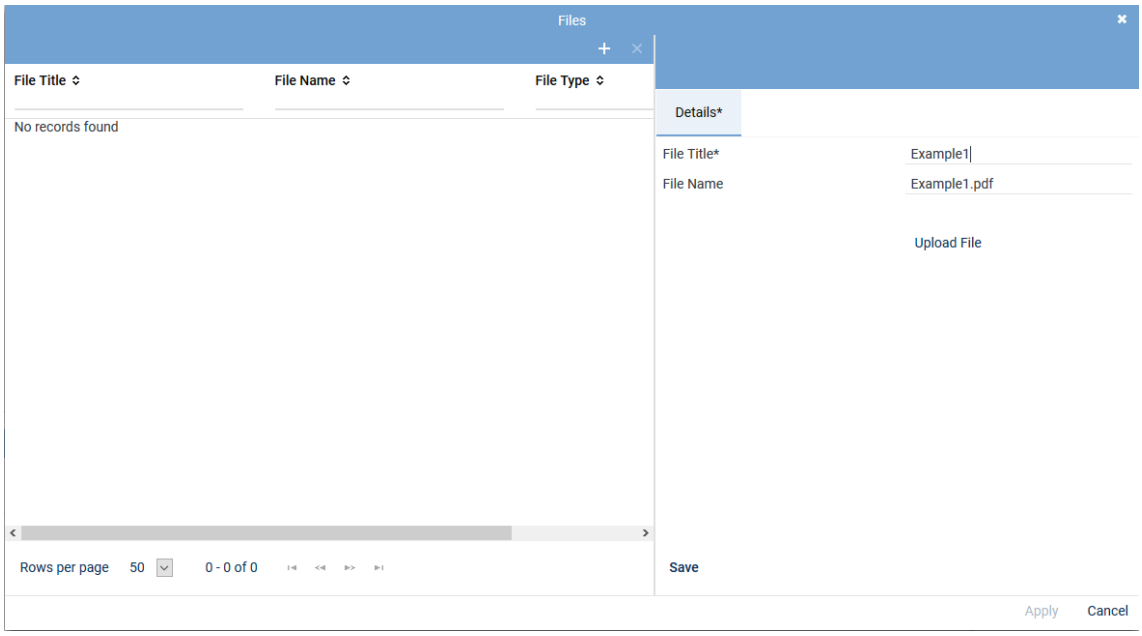


Fig. 82: Save file in file list

8. To apply the file to the element, click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

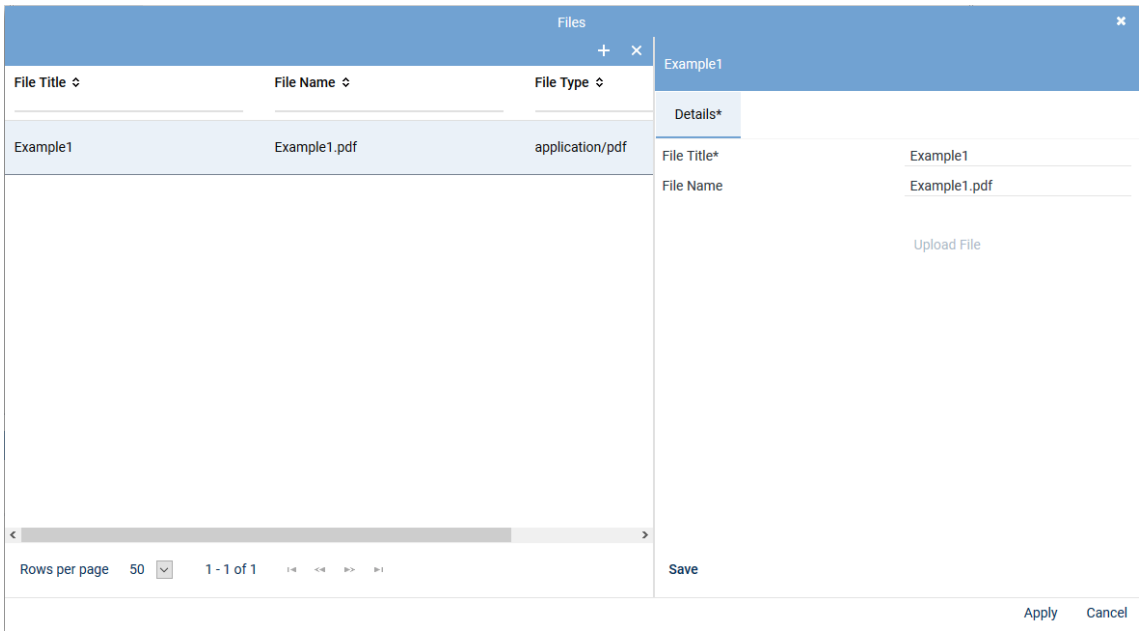


Fig. 83: Apply file to the element

The attachment appears in the element on the right side as icon.

7.2.2 Add file from file list

1. Click on the button + *(Add attachment)*.

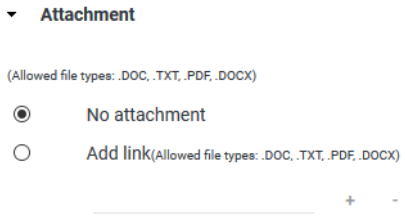


Fig. 84: Element properties Attachment

2. Select a file from the list and click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

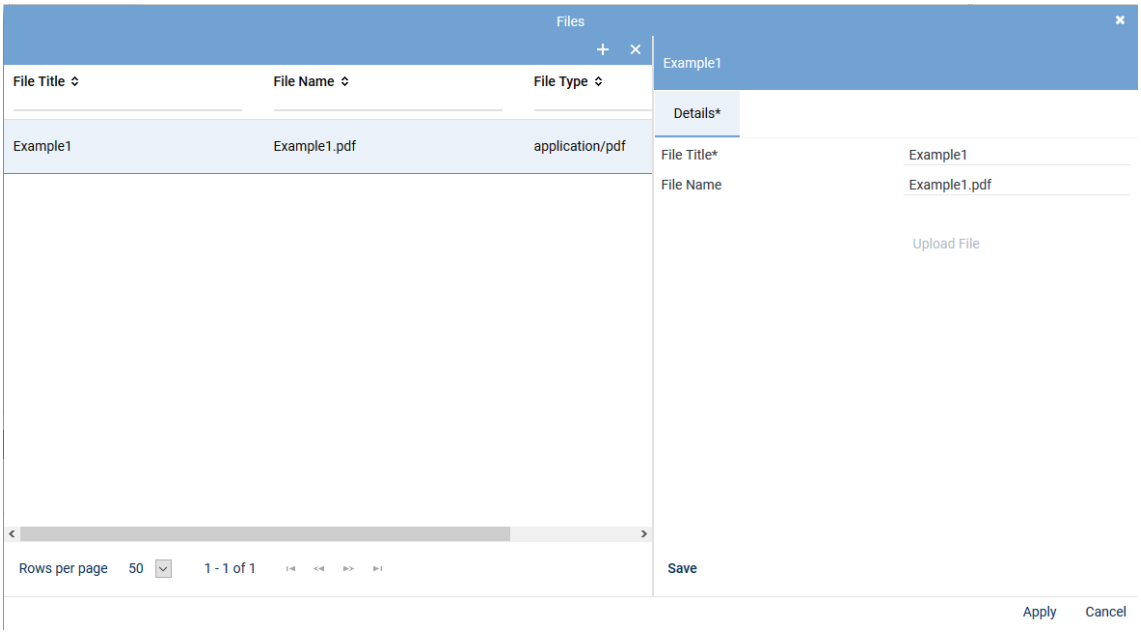


Fig. 85: Apply file from file list

The attachment appears in the element on the right side as icon.

7.2.3 Remove file as attachment of an element

1. Click on the icon *(Remove attachment)*.

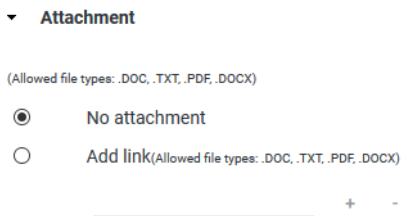


Fig. 86: Element properties Attachment

7.2.4 Delete file from file list

1. Click on the button *(Add attachment)*.

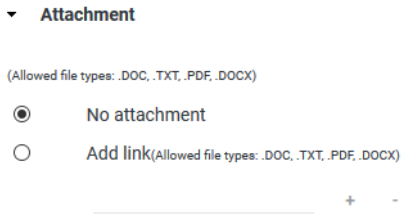


Fig. 87: Element properties Attachment

2. Select the file you would like to delete and click on the icon ✕ *(Delete)*.

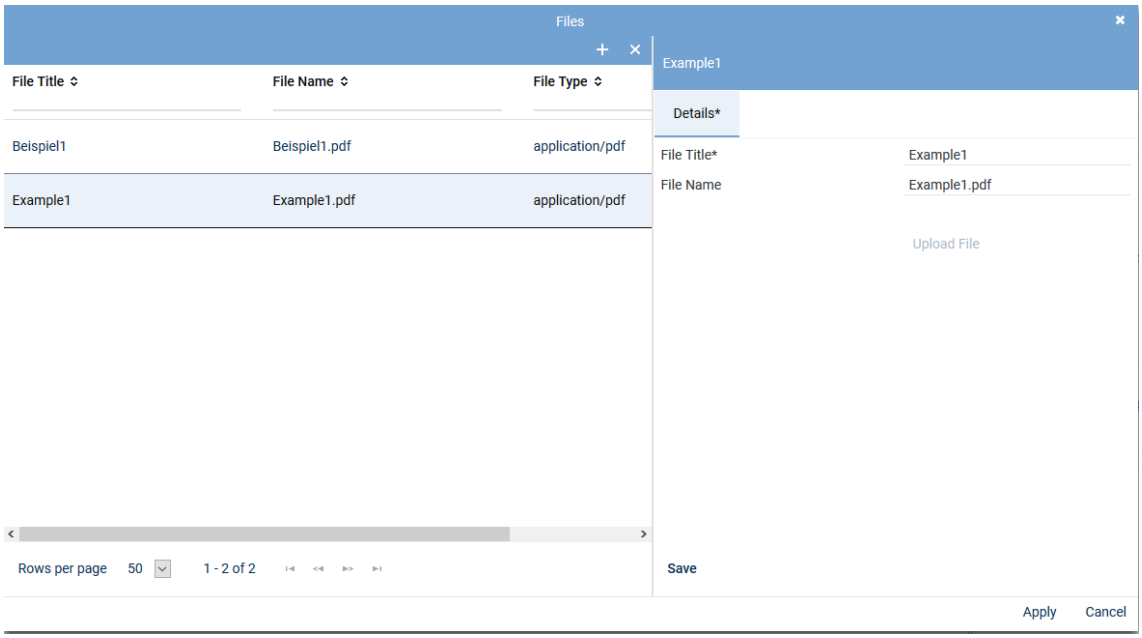


Fig. 88: Delete file

If you confirm the security prompt, the entry will be deleted irrecoverably. Even if you close the window by clicking on the button *Cancel* afterwards, you cannot undo the deletion procedure.

3. To close the window, click on the icon ✕ *(Delete)*.

7.2.5 Add web address as attachment

1. Activate the option *Web address*.

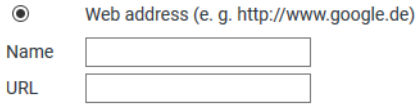


Fig. 89: Add web address

2. In the field *Name*, enter the name which is supposed to be displayed in the element. If you do not enter a text in this field, the web address will be displayed.
3. In the entry field *URL*, enter the web address (e. g. http://www.google.de).

7.3 Answers

The element property *Answers* allows you to define the answers to the corresponding questions. Depending on the selected element, a certain number of answers is available by default (for the elements *Yes/No Question* and *0 - 1 Question* there are exactly 2 answers, for instance,

for the element *Remark* only 1); for other elements such as *Multiple Choice Question* you can add additional answers. For some elements a score for the answer can be entered or you can define whether the answer is the correct one or a default answer.

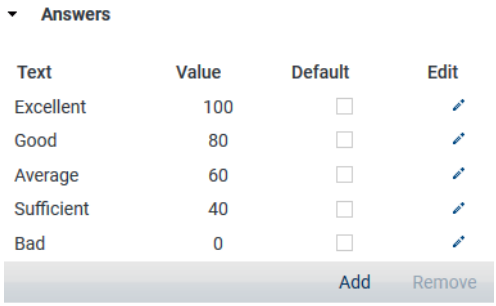


Fig. 90: Element property *Answers* (example by reference to the element *Multiple Choice Question*)

By clicking on the button *Add*, you can add any number of additional answers, see chapter "Add answer", p. 48.

By clicking on the button *Delete*, you can delete a selected answer, see chapter "Delete answer", p. 48. 1 answer always has to remain.

1. To adjust an existing answer individually, click on the icon *(Edit)*, see chapter "Edit answer", p. 47.

Text	Enter the answer text. For the element *0 - 1 Question* enter a number smaller than or equal 1; for the element *0 - 9 Question* enter a number smaller than or equal 9. A number which has already been used cannot be used again.
Correct Answer	Define whether the answer is correct or not. ☑ = Answer is correct. ☐ = Answer is not correct. You can mark several answers as correct.
Value	Enter the score for the answer. You can enter a value from 0 to 100 for the number of points. The values of the default answers depend on the rating scheme and on the element you are editing.
Default	Select whether the answer is to be preselected as default answer. ☑ = Answer is displayed as default answer. ☐ = Answer is not displayed as default answer.

ⓘ In order to obtain precise results, we recommend setting the highest possible answer value for an evaluation element to 100. In other words: We recommend to define a value of 100 for the answers *Excellent* and *Yes*.

The answers may have different values, but the evaluation will not reach a score of 100 then, even though the evaluation has been classified with the highest possible score. This can occur for example, if a correct answer is not assigned the value 100.

2. To save the changes, click on the icon *(Save)*.
   To discard the changes, click on the icon *(Discard)*.

7.3.1 Edit answer

1. To change the text *New answer*, click on the icon *(Edit)*.
2. Enter an answer in the entry field of the column *Text*.

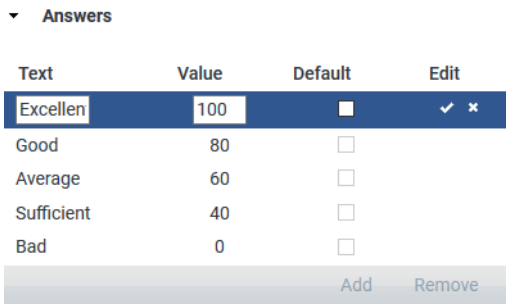


Fig. 91: Edit answer (example by reference to the element *Multiple Choice Question*)

3. If this is a correct answer, activate the check box *Correct Answer*.
   If the answer is not correct, deactivate the check box *Correct Answer*.
4. To save the changes, click on the icon *(Save)*.
   To discard the changes, click on the icon *(Discard)*.

7.3.2 Add answer

1. Click on the button *Add*.

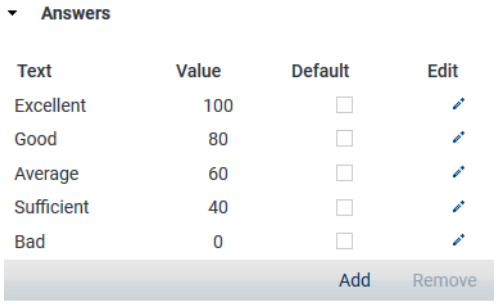


Fig. 92: Add answer (example by reference to the element *Multiple Choice Question*)

2. To change the text *New answer*, click on the icon *(Edit)*.
3. Enter an answer in the entry field of the column *Text*.

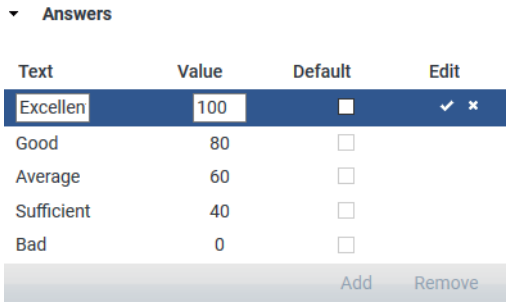


Fig. 93: Edit answer (example by reference to the element *Multiple Choice Question*)

4. If this is a correct answer, activate the check box *Correct Answer*.
   If the answer is not correct, deactivate the check box *Correct Answer*.
5. To save the changes, click on the icon *(Save)*.
   To discard the changes, click on the icon *(Discard)*.

7.3.3 Delete answer

1. Select the answer you would like to delete and click on the button *Delete*.

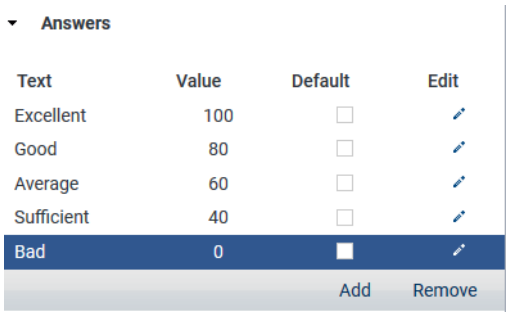


Fig. 94: Delete answer (example by reference to the element *Multiple Choice Question*)

7.4 Description

The element property *Description* allows you to enter a description for selected element.

Fig. 95: Element property *Description* (example by reference to the element *Link*)

Description	Enter a description here which is supposed to be displayed with the link.

7.5 Question

The element property *Question* allows you to enter the text of the question, enter a severity as well as define whether the question is supposed to be a mandatory one or critical for the complete template, for one section or for a question group.

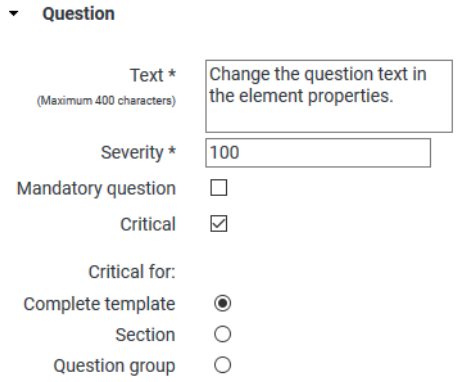


Fig. 96: Element property *Question* (example by reference to the element *Combo Box Question*)

Depending on the element you are editing, the following individual settings can be configured:

Text	Text field for the question text. Enter the question.
Severity	This field allows you to define the importance which is given to the corresponding question during the evaluation. For the severity, you can enter a value from 0 to 100. The value 0 is used for additional questions which are not evaluated. The severity of all elements in a section has to amount to 100 in total or every element has a severity of 100 or 0.
Mandatory question	Define whether the question is mandatory or not. ☑ = The question has to be answered. ☐ = The question does not have to be answered.

Critical	Define whether the inserted question is supposed to be a critical question within a complete template, a section or a question group. If it is a critical question, a negative evaluation will cause the complete template, the section or the question group, depending on the previous selection, to receive a score of 0. ☐ = The question is not critical. ☑ = The question is critical. If this is a critical question, one of the following options has to be selected: • *Critical for: Complete template* • *Critical for: Section* • *Critical for: Question group*

7.6 Questions

Add elements from the template to the question group or remove elements from the question group. You can only add elements of the current section.

7.6.1 Add questions

1. Click on the button *Add*.

Fig. 97: Element property *Questions*

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

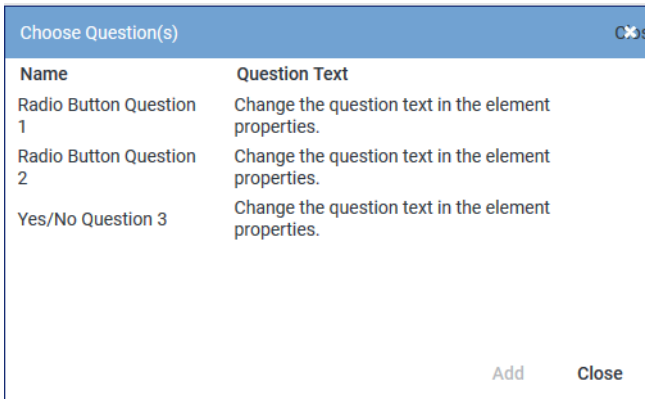


Fig. 98: Select elements

3. To add the selected elements to the question group, click on the button *Add*.
   To discard the selection and close the window, click on the button *Close*.

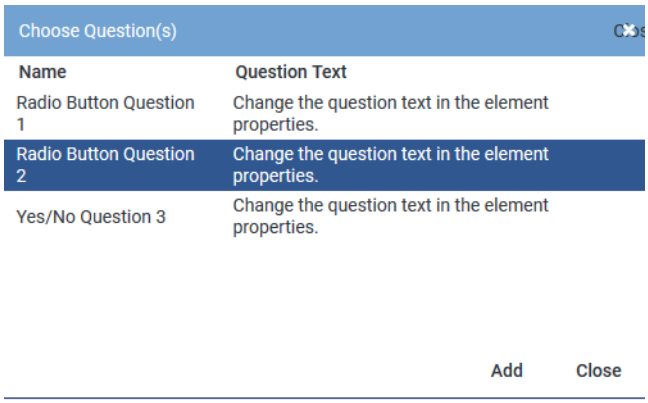


Fig. 99: Add elements

7.6.2 Remove question assignment

1. Click on the line with the question you would like to remove from the question group.

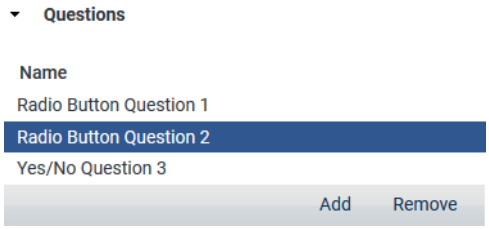


Fig. 100: Remove question assignment

2. Click on the button *Remove*.

7.7 Question Group

The element property *Question Group* allows you to select the question group that the element is supposed to be assigned to.

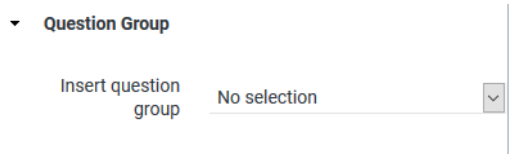


Fig. 101: Element property *Question group* (example by reference to the element *Yes/No Question*)

1. To assign a question group, select a question group from the drop-down list.

In the drop-down list, only those question groups are available which have been defined for the section, see chapter "Element Question Group", p. 22. Questions of different sections cannot be comprised in one question group.

7.8 Content

The element property *Content* allows you to define the text and the severity of the question group.

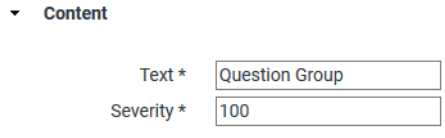


Fig. 102: Element property *Content* (example by reference to the element *Question Group*)

Text	Text field for the question group. This text is displayed in the element in the template.
Severity	This field allows you to define the importance which is given to the corresponding question group during the evaluation. For the severity, you can enter a value from 0 to 100. The value 0 is used for additional questions which are not evaluated. The severity of all elements in a section has to amount to 100 in total or every element has a severity of 100 or 0.

7.9 Categories

Here, you select the category you would like to assign the question to. You can assign more than 1 category to the question.

Example: In the context of a customer survey, there may be questions regarding the agent and general questions about the product. You can treat the agent-relevant questions and not-agent-relevant questions differently in the summary, by assigning them to different categories. Questions and possible negative evaluations which may not be imputed on the agent can thus remain unconsidered during the evaluation.

7.9.1 Create and add new category

1. Click on the icon + *(Add)*.

Fig. 103: Element property *Categories*

2. Click on the icon + *(Create new category)*.

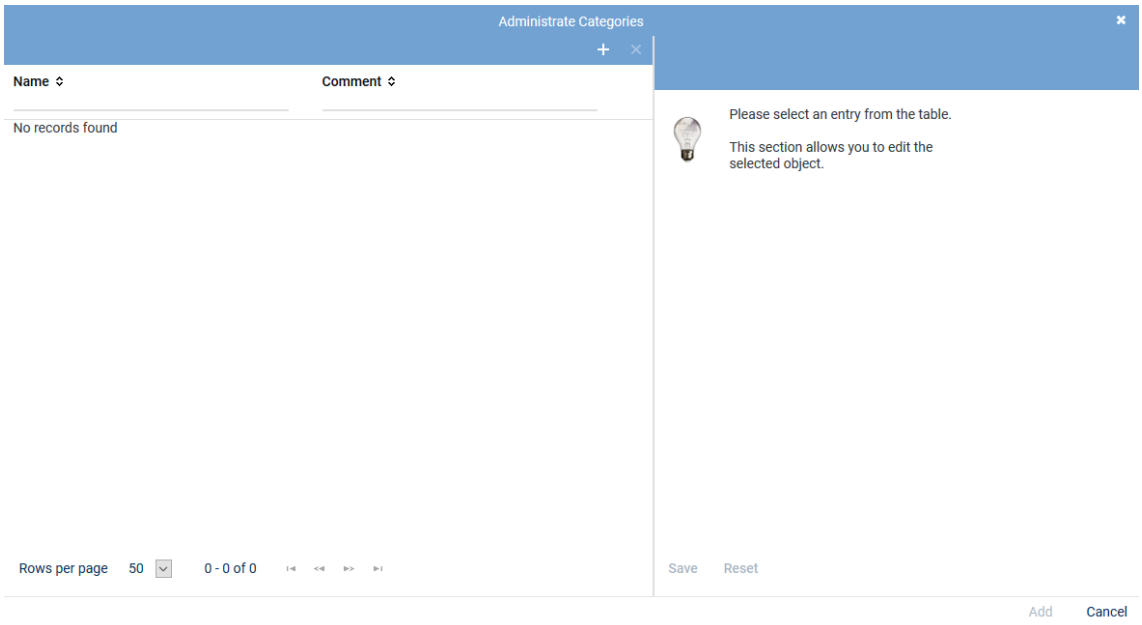


Fig. 104: Create new category

3. Enter a name for the category in the entry field *Name*.

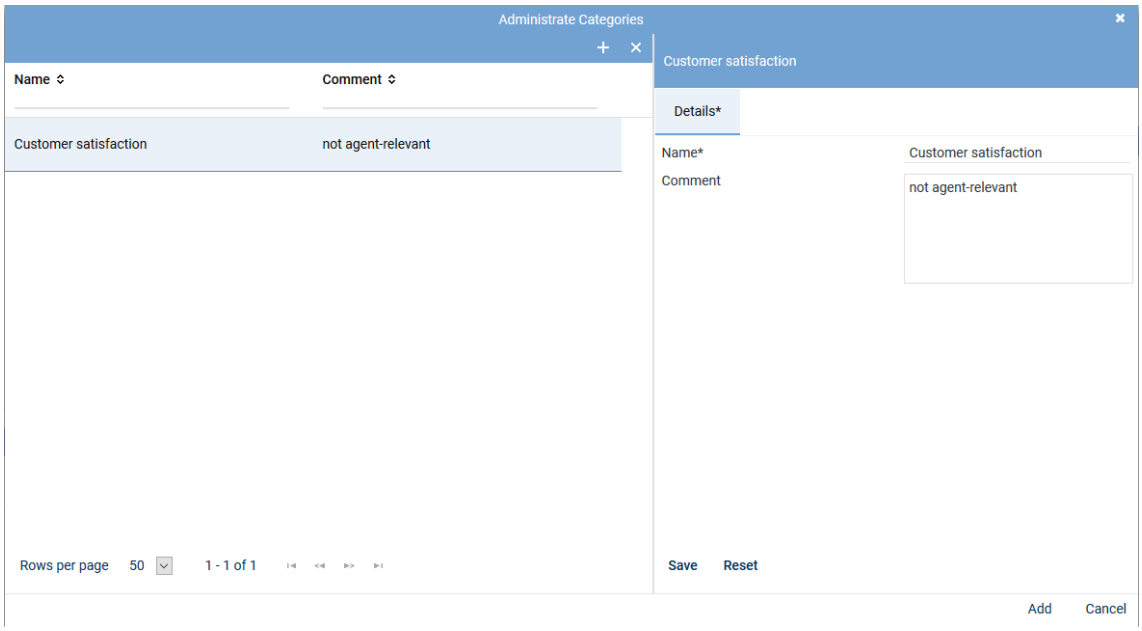


Fig. 105: New category saved

4. If required, enter a comment for the category in the entry field *Comment*.
5. To save the category, click on the button *Save*.
   To discard the changes, click on the button *Reset*.
6. To apply the category for the element, click on the button *Add*.
   To discard the selection and close the window, click on the button *Cancel*.

7.9.2 Assign existing category

1. Click on the icon + *(Add)*.

Fig. 106: Element property *Categories*

2. Select a category from the list.

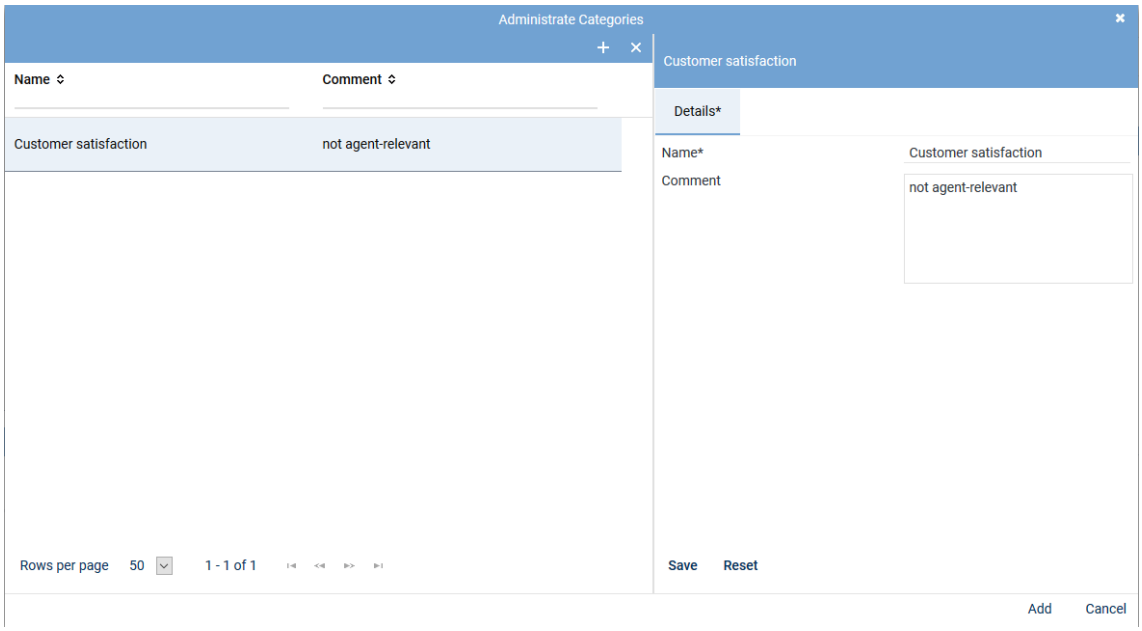


Fig. 107: Select category from the list of categories

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

7.9.3 Delete category

1. Click on the icon + *(Add)*.

Fig. 108: Element property *Categories*

2. From the list, select the category you would like to delete and click on the icon × *(Delete)*.

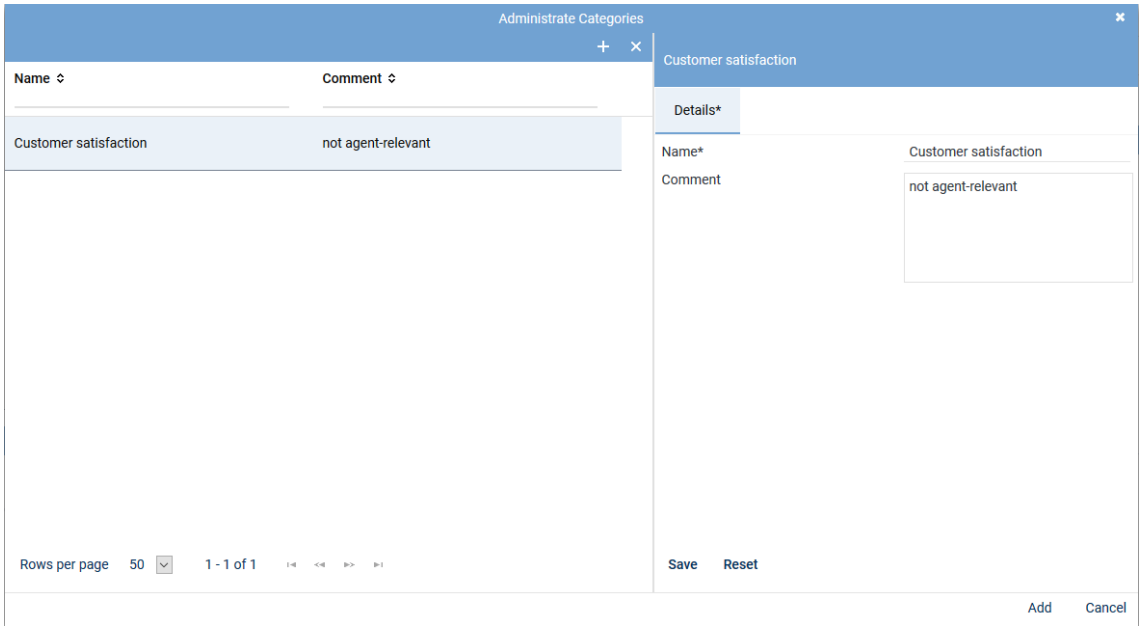


Fig. 109: Delete category

3. To really delete the category, confirm the security prompt.

7.9.4 Remove category assignment

1. Select the category you would like to remove and click on the button *(Remove)*.

Fig. 110: Remove category

7.10 Layout

The element property *Layout* allows you to define the appearance of the element.

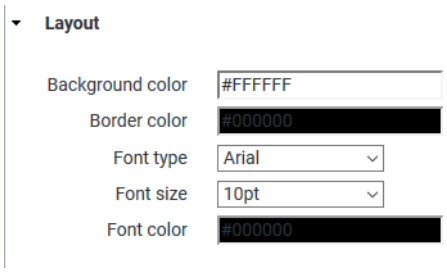


Fig. 111: Element property *Layout* (example by reference to the element *Remark*)

Depending on the element you are editing, the following individual settings can be configured:

Background color	Here, you can define the background color of the element.
Border color	Here, you can define the border color of the element.
Font type	Here, you can set the font type. To do so, click on the arrow key behind the entry field and select the font type in the drop-down list.
Font size	Here, you can set the font size. To do so, click on the arrow key behind the entry field and select the font size in the drop-down list.
Font color	Here, you can define the font color of the element.
Show answers below the question	Here, you can select whether the answers are supposed to be displayed below the question. ☑ = Answers are displayed. ☐ = Answers are not displayed.

For information about how to change the colors in the respective elements see chapter "Change color", p. 55.

7.10.1 Change color

To change the background color, the border color or the font color of a respective element, click on the corresponding entry field behind the color.

1. You have 2 options to select a color:
   - Enter the RGB value
   - Select color from the color palette

Fig. 112: Define color

2. To apply the color, click on the icon *(Apply selected color)*.
   To cancel the process and close the window, click on the working area.

7.10.2 Change the display area of the answer

1. To show the answers below the question, activate the check box *Show answers below the question*.

⇨

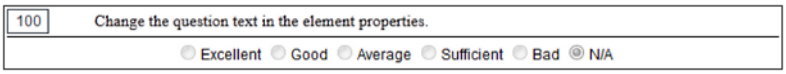


Fig. 113: Show answers below the question - activated

2. To show the answers on the right side of the question, deactivate the check box *Show answers below the question*.

⇨

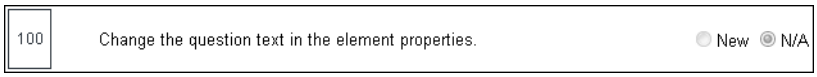


Fig. 114: Show answers below the question - deactivated

7.11 Score Guide

The element property *Score Guide* allows you to define the guidelines to evaluate the question. Describe for example which criteria will lead to a positive or negative answer.

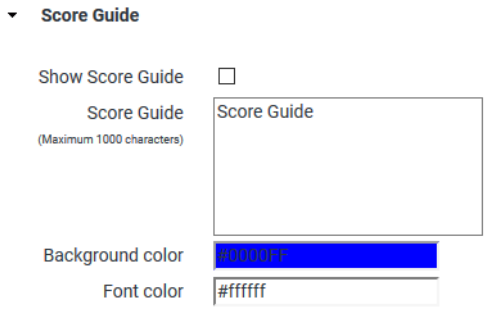


Fig. 115: Element property *Score Guide* (example by reference to the element *Radio Button Question*)

Show Score Guide	Define whether a score guide is supposed to be added to the question. ☑ = Score guide is added. ☐ = Score guide is not added. In the template, the score guide is displayed by the icon ⓘ. The user can open the score guide and show its content by clicking on this icon.
Score Guide	In this text field, you define the description of the guidelines for the evaluation of the question.

Background color	In this field, you can configure the background color (see chapter "Change color", p. 55).
Font color	In this field, you can configure the font color (see chapter "Change color", p. 55).

7.12 Text

The element property *Text* allows you to enter a text with general information which is supposed to be displayed in the template or to define a question that the participant of a customer survey is supposed to answer.

Fig. 116: Element property *Text* (example by reference to the element *Comment*)

Depending on the element you are editing, the following individual settings can be configured:

Text	Enter the question for the customer comment or the informative text for the template.
Default text	Enter a text which is supposed to be displayed in the comment field (e. g. the prompt to enter a comment). This text can be overwritten and edited during the evaluation.

List of figures

Fig. 1 Create template (example) ... 8
Fig. 2 Toolbar of the template generator (example) ... 10
Fig. 3 Edit sections (example) ... 12
Fig. 4 Edit sections (example) ... 12
Fig. 5 Edit sections ... 13
Fig. 6 Section added ... 13
Fig. 7 Select section ... 13
Fig. 8 Sections ... 14
Fig. 9 Section selected ... 14
Fig. 10 Change section ... 15
Fig. 11 Sections ... 15
Fig. 12 Change section ... 15
Fig. 13 Select rating scheme ... 16
Fig. 14 Select and apply rating scheme ... 16
Fig. 15 Add skills ... 17
Fig. 16 Preview ... 18
Fig. 17 Preview result ... 18
Fig. 18 Load summary (example) ... 19
Fig. 19 Element bar (example) ... 20
Fig. 20 Radio Button Question ... 21
Fig. 21 Combo Box Question ... 22
Fig. 22 Yes/No Question ... 22
Fig. 23 Remark ... 22
Fig. 24 Comment ... 22
Fig. 25 Text ... 22
Fig. 26 Question Group ... 22
Fig. 27 Image ... 22
Fig. 28 Link ... 23
Fig. 29 Line ... 23
Fig. 30 Multiple Choice Question ... 23
Fig. 31 0 - 9 Question ... 23
Fig. 32 0 - 1 Question ... 23
Fig. 33 Customer Comment ... 24
Fig. 34 Tab Favorites ... 24
Fig. 35 Save element as favorite (example) ... 24
Fig. 36 Select favorite category ... 25
Fig. 37 Select favorite category ... 25
Fig. 38 Select favorite category ... 25
Fig. 39 Select favorite category ... 26
Fig. 40 Create new favorite category ... 26
Fig. 41 Enter new favorite category and save ... 26

Fig. 42 Select favorite category ... 27
Fig. 43 Delete favorite category ... 27
Fig. 44 Element Browser (example) ... 28
Fig. 45 Element Properties (example) ... 29
Fig. 46 Element property General (example by reference to the element Link) ... 29
Fig. 47 Add audio file ... 30
Fig. 48 Add file ... 31
Fig. 49 Upload File ... 31
Fig. 50 Add audio file ... 32
Fig. 51 Apply file to the element ... 32
Fig. 52 Add audio file ... 32
Fig. 53 Delete file ... 33
Fig. 54 Add link ... 33
Fig. 55 Add file ... 34
Fig. 56 Upload File ... 34
Fig. 57 Choose file ... 34
Fig. 58 Open file ... 35
Fig. 59 Upload File ... 35
Fig. 60 Save file in file list ... 36
Fig. 61 Apply file to the element ... 36
Fig. 62 Add link ... 37
Fig. 63 Apply file from file list ... 37
Fig. 64 Add web address ... 37
Fig. 65 Add image ... 38
Fig. 66 Add file ... 38
Fig. 67 Upload File ... 38
Fig. 68 Choose file ... 39
Fig. 69 Open file ... 39
Fig. 70 Upload File ... 39
Fig. 71 Save file in file list ... 40
Fig. 72 Apply saved image ... 40
Fig. 73 Add image ... 40
Fig. 74 Apply saved image ... 41
Fig. 75 Element property Attachment (example by reference to the element Radio Button Question) ... 41
Fig. 76 Element properties Attachment ... 41
Fig. 77 Add file ... 42
Fig. 78 Upload File ... 42
Fig. 79 Choose file ... 42
Fig. 80 Open file ... 43
Fig. 81 Upload File ... 43
Fig. 82 Save file in file list ... 44
Fig. 83 Apply file to the element ... 44

Fig. 84 Element properties Attachment ... 45
Fig. 85 Apply file from file list ... 45
Fig. 86 Element properties Attachment ... 45
Fig. 87 Element properties Attachment ... 46
Fig. 88 Delete file ... 46
Fig. 89 Add web address ... 46
Fig. 90 Element property Answers (example by reference to the element Multiple Choice Question) ... 47
Fig. 91 Edit answer (example by reference to the element Multiple Choice Question) ... 48
Fig. 92 Add answer (example by reference to the element Multiple Choice Question) ... 48
Fig. 93 Edit answer (example by reference to the element Multiple Choice Question) ... 48
Fig. 94 Delete answer (example by reference to the element Multiple Choice Question) ... 49
Fig. 95 Element property Description (example by reference to the element Link) ... 49
Fig. 96 Element property Question (example by reference to the element Combo Box Question) ... 49
Fig. 97 Element property Questions ... 50
Fig. 98 Select elements ... 50
Fig. 99 Add elements ... 51
Fig. 100 Remove question assignment ... 51
Fig. 101 Element property Question group (example by reference to the element Yes/No Question) ... 51
Fig. 102 Element property Content (example by reference to the element Question Group) 51
Fig. 103 Element property Categories ... 52
Fig. 104 Create new category ... 52
Fig. 105 New category saved ... 53
Fig. 106 Element property Categories ... 53
Fig. 107 Select category from the list of categories ... 54
Fig. 108 Element property Categories ... 54
Fig. 109 Delete category ... 54
Fig. 110 Remove category ... 55
Fig. 111 Element property Layout (example by reference to the element Remark) ... 55
Fig. 112 Define color ... 56
Fig. 113 Show answers below the question - activated ... 56
Fig. 114 Show answers below the question - deactivated ... 56
Fig. 115 Element property Score Guide (example by reference to the element Radio Button Question) ... 56
Fig. 116 Element property Text (example by reference to the element Comment) ... 57

List of tables

Glossary