

INSPIRATION^{neo}

Quality Management module



User manual

5/20/2019

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>.

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1

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2 Introduction

The Quality Management module allows users to administrate evaluations, carry out calibrations, and define quality alarms. To edit the different functions, the Quality Management module has been divided into the following modules:

- Evaluations module

The Evaluations module enables the user to administrate and re-evaluate evaluations, to create calibrations for evaluations as well as to carry out calibration evaluations. See [chapter "Evaluations module", p. 9](#).

- Calibrations module

The Calibrations module enables the user to create, administrate, and analyze calibrations. See [chapter "Calibrations module", p. 38](#).

- Quality Alarms module

The Quality Alarms module is used to create quality alarms in order to inform the supervisor when agents do not reach a previously defined threshold value in an evaluation or quiz. See [chapter "Quality Alarms module", p. 63](#).

- Assignments module

NOTICE! This module is only available in the *advanced* version.

The Assignments module enables users to create random factors for the automated selection of sessions to be evaluated. See [chapter "Assignments module", p. 84](#).

Open the particular module by clicking on the respective sub-menu item in the navigation bar in the menu item *Quality Management*.



Fig. 1: Menu item Quality Management



Basic information about using the application INSPIRATION_{neo} can be found in the user manual *INSPIRATIONneo - General information*.



You need a current JAVA version to have access to the buttons you need to replay a session.



Only those employees are displayed as *supervisors* who have been assigned the role *Supervisor* by the administrator.

3 Evaluations module

3.1 General

The Evaluations module enables the user to administrate and re-evaluate evaluations, to create calibrations for evaluations as well as to carry out calibration evaluations. All evaluations are displayed here which have been made in the Agents module and in the Sessions module. All information concerning the evaluation can be called up in this module any time. In addition to the evaluation, the corresponding session is saved as well to guarantee that users can replay the session that has led to this evaluation at a later moment. This allows tracing back the reasons of the evaluation.

Training Packages

Users can create training packages and assign them to one or several agents if they think that an evaluation reveals the need for additional training. To prevent the interruption of workflows, users can directly select and assign the training package in the Evaluations module and does not have to change to the Training Packages module.



See also user manual *INSPIRATIONneo - Usage E-Learning module*.

Access right to evaluations

Different access rights can be granted to make sure that users can only access those evaluations that they have rights for (e. g. depending on the organization structure). Another option is to individually define whether users have the right to re-evaluate a session or can make no adjustments.

Agent feedback

Actively integrating agents into the quality management process for continuous improvement of service quality is an essential part of *INSPIRATIONneo*. The Agent Feedback function enables the evaluated agents to add comments to their evaluations. They can even express their agreement with the evaluation or reject it. This positive or negative feedback serves as a digital signature of the agent. Evaluations which have not been released by the agents are not considered in the reporting but usually are the basis for an assessment talk between supervisor and agent. This allows the supervisor to re-evaluate the session if he comes to the conclusion during a talk with the agent that the evaluation should be adapted. However, the supervisor also can overrule the agent if he has the respective user rights.

Re-evaluation of sessions

In the application System Configuration, it is possible to configure a period of time during which already finalized evaluations may continue to be edited. That way, an already released evaluation can be adjusted and released as a new version once again instead of its original. This may be necessary if an agent used the Agent Feedback function to raise a justified objection to the evaluation.

The functions *Calibrate*, *Close calibration*, and *Load* are only available for evaluations of sessions.



Only those employees are displayed as *supervisors* who have been assigned the role *Supervisor* by the administrator.


















In the Evaluations module, the template used for the session is automatically used for the calibration.

3.2

Main view

In the main view, all saved evaluations are displayed.


| X Evaluations General | | | | | | | |
|-----------------------|-------------------|----------------------------|---|---|---|-------------------|--------|
| Agent Name | Created By | Template Name | Status | Kind Of Evaluation | Agent Feedback | Conversation Type | Result |
| Agent, 5. | Admin, 1st-Tenant | Agentenbewertung Telefon |  |  |  | Call | 50.0 |
| Agent, 2. | Admin, 1st-Tenant | Testbewertung |  |  |  | Call | 40.0 |
| Agent, 1. | Admin, 1st-Tenant | Testbewertung |  |  |  | Call | 40.0 |
| Agent, 5. | Admin, 1st-Tenant | Testbewertung |  |  |  | Call | 80.0 |
| Agent, 1. | Admin, 1st-Tenant | Agent evaluation telephone |  |  |  | Call | 70.0 |

Rows per page: 50 1 - 5 of 5

Fig. 2: Evaluations - main view (example)

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

| | |
|---------------------------|--|
| Agent Name | Name of the evaluated agent |
| Created By | Name of the user who has made the evaluation. |
| Template Name | Name of the template used for the evaluation. |
| Status | Shows the processing status of the evaluation.  = Evaluation has been released.  = Evaluation is a draft.  = Evaluation is obsolete.  = Based on a negative agent feedback, the evaluation is ignored in the reporting.  = Agent feedback is pending.  = Calibration is open.  = Calibration is pending.  = Calibration has been finished. |
| Kind of Evaluation | Shows the type of the evaluation.  = first evaluation  = re-evaluation  = reference evaluation  = calibration evaluation  = mediation evaluation |
| Agent Feedback | Status of the agent feedback.  = Agent feedback has not been activated.  = Agent feedback has not been confirmed yet.  = Agent agrees with the evaluation.  = Agent does not agree with the evaluation.  = Agent does not want to give a feedback. |

| | |
|--------------------------|---|
| |  = Agent feedback has been overruled. The evaluator can only overrule the agent's feedback if the agent does not agree with the evaluation. |
| <i>Conversation Type</i> | Shows the type of the evaluation: <ul style="list-style-type: none"> • <i>Call</i> (only phone call or video call) • <i>Work item</i> (only screen activity) • <i>Chat</i> • <i>Conversation</i> (phone call including screen activity) |
| <i>Result</i> | Shows the result (achieved score) of the evaluation. |
| <i>Contains Note</i> | Shows whether the evaluation contains a note. |
| <i>Call ID</i> | Shows the call ID which serves to map the evaluation to the call. |
| <i>Creation Date</i> | Date on which the evaluation was created. |
| <i>Updated</i> | Date on which the evaluation was updated for the last time. |

3.2.1 Toolbar of the main view

The toolbar offers the following functions.



Fig. 3: Toolbar Evaluations module

| | | |
|---|---|--|
|  | <i>Delete</i> | Deletes the selected evaluation. See chapter "Delete evaluation", p. 26. |
| <i>Evaluations</i> | <i>View</i> | Shows the carried-out evaluation. See chapter "View evaluation", p. 26. |
| | <i>Re-Evaluate</i> | Allows a new evaluation. See chapter "Re-evaluate", p. 28. |
| | <i>Assign Mediation Evaluation</i> | Allows assigning a supervisor a mediation evaluation. By means of this mediation evaluation an agent or a session can be evaluated again independently of another supervisor. See chapter "Assign mediation evaluation", p. 29. |
| | <i>Release Evaluation</i> | Releases the selected evaluation. See chapter "Release evaluation", p. 30. |
| | <i>Calibrate *)</i> | Creates a calibration of the selected evaluation. See chapter "Create calibration", p. 31. |
| | <i>Finalize Calibration Evaluation *)</i> | Finalizes the selected calibration evaluation. See chapter "Finalize calibration evaluation", p. 34 |
| | <i>Summary</i> | Creates a summary of the selected evaluation. See chapter "Create summary", p. 34. |
| | <i>Load *)</i> | Loads the assigned session into the Replay module for replay. See chapter "Replay of a session", p. 35. For information about the functions of the Replay module see chapter "Replay module", p. 98. |
| | <i>Print Evaluation</i> | Prints the content of the selected evaluation. See chapter "Print evaluation", p. 36. |
| <i>General</i> | <i>Print</i> | Prints the table of the main view. |

| | |
|---------------------------------|---|
| <i>Adjust Table</i> | Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page |
| <i>Save Table Configuration</i> | Saves the current table configuration of the main view as default view of the user. |
| <i>Search</i> | Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see chapter "Search", p. 12 . |
| <i>Reset Search</i> | Resets all manually entered search criteria. The search is started without manual filter settings. |
| <i>General Help</i> | By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened. |
| <i>Module Help</i> | By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened. |

*) These functions are only available when evaluating sessions.



In the user manual *INSPIRATIONneo - General information*, you find detailed descriptions of the default functions such as *Print*, *Adjust table* or *Help* if required.

3.2.1.1 Search

The search function allows searching systematically for sets of data which meet certain criteria.

1. Click on the menu item *General > Search* in the toolbar.

⇒ The window *Search Criteria* appears.

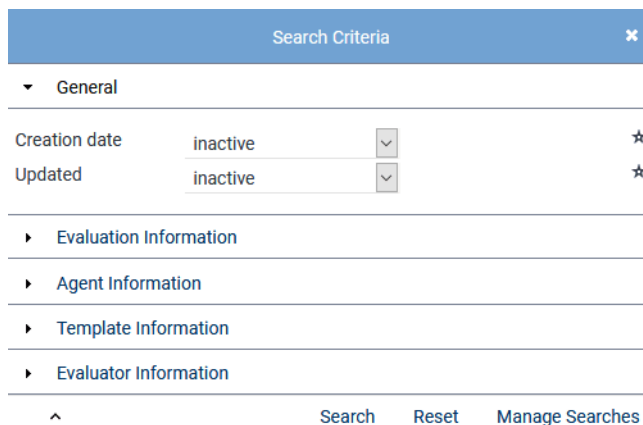


Fig. 4: Window Search Criteria (example)

2. Set the respective search criteria.
NOTICE! It depends on the respective module which search criteria are available.
3. To start the search, click on the button *Search*.
To reset all manually entered search criteria, click on the button *Reset*.
⇒ After running the search, only those sets of data are displayed in the main view which meet the set search criteria.
4. To display all original sets of data in the main view again, i. e. to reset the manually entered search criteria, click on the menu item *General > Reset Search* in the toolbar.

Via the button *Manage Searches* you can save the defined search criteria under an unambiguous name, to load saved search criteria or delete them.

Via the icon ★ you can tag the search criterion as favorite. Criteria tagged as favorite are displayed additionally in the upper area of the window *Search Criteria* and marked with the icon ★.

If conversation rules (view filters) apply for the logged-in user, then predefined search settings are displayed in the search criteria of the following modules which comply with the filter settings of the conversation rules:



- Sessions module
- Calibrations module
- Audio Analysis module

You cannot delete these user-specific filter settings or search settings: however, you can add new ones and thus additionally filter the displayed entries in the main view.



A detailed description of the search function can be found in the user manual *INSPIRATIONneo - General information*.

3.2.2 Icons in the evaluations table

| | | |
|---|-------------------------------|---|
|  | <i>Draft</i> | Shows that the evaluation has not been released yet. |
|  | <i>Released</i> | Shows that the evaluation has been released. |
|  | <i>Open</i> | Shows that the calibration evaluation has been started. |
|  | <i>Pending</i> | Shows that the calibration evaluation is pending. |
|  | <i>Finished</i> | Shows that the calibration evaluation has been finished. |
|  | <i>Obsolete</i> | Shows that the evaluation is obsolete. This evaluation has been created as a basis for a re-evaluation or a mediation evaluation. The previous status of the evaluation was "Released". |
|  | <i>Obsolete</i> | Shows that the evaluation is obsolete. This evaluation has been created as a basis for a re-evaluation or a mediation evaluation. The previous status of the evaluation was "Ignored". |
|  | <i>Ignored</i> | Shows that the evaluation is ignored in the reporting. |
|  | <i>Agent feedback pending</i> | Shows that an agent feedback is pending. |
|  | <i>First evaluation</i> | Shows that this is a first evaluation. |
|  | <i>Re-evaluation</i> | Shows that the evaluation has been edited. Several evaluation processes are possible. |
|  | <i>Calibration evaluation</i> | Shows that this is a calibration evaluation. |
|  | <i>Mediation evaluation</i> | Shows that this is a mediation evaluation. |
|  | <i>Switched off</i> | Shows that the function Agent Feedback of the evaluation template has been deactivated. |
|  | <i>Not yet confirmed</i> | Shows that the agent has not made an evaluation yet. |
|  | <i>Agree</i> | Shows that the agent agrees with the evaluation. |
|  | <i>Disagree</i> | Shows that the agent does not agree with the evaluation. The evaluation can be repeated or overruled by the evaluator. |
|  | <i>N/A</i> | Shows that the agent has not given an agent feedback. |
|  | <i>Overruled</i> | Shows that the agent feedback has been overruled. |

3.3 Detail view

The detail view contains additional information about and functions for the selected template.

Agent, 5. ×

<

Details

Agent Feedback

Assigned Session

Training Packages

>

ⓘ Help

Show Evaluation ✎

| | |
|--------------------|------------------------|
| Agent | Agent, 5. |
| Kind of evaluation | First evaluation |
| Evaluator | Admin, 1st-Tenant |
| Creation date | 22.11.2018 02:27:27 |
| Status | Released |
| Release date | 22.11.2018 02:27:26 |
| Agent confirmation | Agree |
| Confirmation date | 12.12.2018 00:27:42 |
| Conversation type | Call |
| Session start time | 11/20/2018 12:30:15 AM |
| Session end time | 11/20/2018 12:30:40 AM |
| Session duration | 12:00:25 AM |
| Result | 50.0 |

Save

Reset

Fig. 5: Evaluation of an agent - detail view (example)

The detail view consists of the following tabs:

- *Details*
Here, you can display and edit detailed information about the selected evaluation.
See [chapter "Tab Details", p. 14.](#)
- *Agent Feedback*
Here, you can enter a feedback for your evaluation.
See [chapter "Tab Agent Feedback", p. 16.](#)
- *Assigned session*
Here, you can replay the session which has been used for the evaluation and save it as a [WAVE](#) file.
See [chapter "Tab Assigned Session", p. 17.](#)
- *Training Packages*
Here, you can assign, create, and accept training packages.
See [chapter "Tab Training Packages", p. 19.](#)

3.3.1 Tab Details

Here, you can display and edit detailed information about the selected evaluation.

The displayed information depends on whether an agent has evaluated a session or whether it is a calibration.


| | | | | | |
|---|------------------------|----------------|------------------|-------------------|--------|
| < | Details | Agent Feedback | Assigned Session | Training Packages | > |
| | | | | | ② Help |
| Show Evaluation  | | | | | |
| Agent | Agent, 5. | | | | |
| Kind of evaluation | First evaluation | | | | |
| Evaluator | Admin, 1st-Tenant | | | | |
| Creation date | 22.11.2018 02:27:27 | | | | |
| Status | Released | | | | |
| Release date | 22.11.2018 02:27:26 | | | | |
| Agent confirmation | Agree | | | | |
| Confirmation date | 12.12.2018 00:27:42 | | | | |
| Conversation type | Call | | | | |
| Session start time | 11/20/2018 12:30:15 AM | | | | |
| Session end time | 11/20/2018 12:30:40 AM | | | | |
| Session duration | 12:00:25 AM | | | | |
| Result | 50.0 | | | | |

Fig. 6: Evaluation of a session - detail view (example)

You can edit an evaluation as long as it has the status *Draft*.

1. Click on the icon  (*Edit*) to edit the evaluation. See [chapter "Edit evaluation", p. 30](#)

Depending on the type of the evaluation, the following information is available:

| | |
|---------------------------|--|
| Agent | Name of the evaluated agent. |
| Kind of evaluation | Shows the type of the evaluation. Possible evaluation types: <ul style="list-style-type: none"> • <i>First evaluation</i> • <i>Re-evaluation</i> • <i>Reference evaluation</i> (for calibrations only) • <i>Calibration evaluation</i> (for calibrations only) |
| Evaluator | Name of the user who has created the evaluation. |
| Creation date | Date on which the evaluation was created. |
| Status | Shows the processing status of the evaluation. The following statuses are available: <ul style="list-style-type: none"> • <i>Draft</i> • <i>Released</i> • <i>Ignored</i> • <i>Obsolete</i> • <i>Open</i> (for calibrations only) • <i>Pending</i> (for calibrations only) • <i>Finished</i> (for calibrations only) |
| Release date | Date on which the evaluation was released. |
| Agent confirmation | Status of the agent feedback (only with activated option <i>Agent feedback activated</i> in the template). If a template has been activated for agent feedback, then every evaluation on the basis of this template has to be confirmed by the agent who is being evaluated. |

| | |
|--------------------------------|--|
| | <p>The following statuses are available:</p> <ul style="list-style-type: none"> • <i>Not yet confirmed</i> • <i>Agree</i> • <i>Disagree</i> • <i>Overruled</i> |
| <i>Confirmation date</i> | Date on which the agent has submitted his feedback (only with activated option <i>Agent feedback activated</i> in the template). |
| <i>Submission date</i> | Submission date of the evaluation (for calibrations only) |
| <i>Name of the calibration</i> | Name of the calibration (for calibrations only) |
| <i>Conversation type</i> | <p>Type of the evaluation (for calibrations and sessions only)</p> <p>The following types are available:</p> <ul style="list-style-type: none"> • Call • Work item • Text • Chat |
| <i>Session start time</i> | Start time of the session (for calibrations and sessions only) |
| <i>Session end time</i> | End time of the session (for calibrations and sessions only) |
| <i>Session duration</i> | Duration of the session (for calibrations and sessions only) |
| <i>Result</i> | Shows the result (achieved score) of the evaluation. |

3.3.2 Tab Agent Feedback

Here, you can adjust the agent confirmation as well as display and edit detailed information about the agent feedback.

Users with the appropriate rights can overrule an existing agent feedback. Overruled evaluations are taken into account in the reports.



The user has to have the respective access authorization to be able to access a module or a function.

The displayed information depends on the status of the agent feedback and the rights of the user.

| Details | Agent Feedback | Assigned Session | Training Packages |
|---|---------------------------|------------------|-------------------|
| Feedback | Bewertung nicht sachlich! | | |
| Agent confirmation | Disagree | | |
| Overruled | <input type="checkbox"/> | | |
| <div> <div>Save</div> <div>Reset</div> </div> | | | |

Fig. 7: Agent feedback - detail view (example)

In general, the following information is available:

| | |
|---------------------------|---|
| <i>Feedback</i> | Shows comments about the evaluation and allows further comments (with the appropriate right). |
| <i>Agent confirmation</i> | <p>Status of the agent feedback.</p> <p>The following statuses are available:</p> |

| | |
|------------------|--|
| | <ul style="list-style-type: none"> • <i>N/A</i> (not applicable) - the agent has seen the evaluation but does not want to confirm it • <i>Agree</i> - The agent agrees with the evaluation. • <i>Disagree</i> - The agent does not agree with the evaluation. • <i>Overruled</i> - The agent did not agree with the evaluation and was overruled by the evaluator. |
| <i>Comment</i> | Shows the comments of the evaluator. Comments can only be entered as an explanation if an agent has been outvoted, for instance. |
| <i>Overruled</i> | Evaluators with the appropriate rights can overrule an existing agent feedback here. |

3.3.3 Tab Assigned Session

Here, you can replay and save the assigned session as well as display detailed information.

Details
Agent Feedback
Assigned Session
Training Packages



Duration12:00:55 AM
Start time11/20/2018 12:33:33 AM
End time11/20/2018 12:34:28 AM
CommentÄrgergespräch!

SaveReset


Fig. 8: Assigned session - detail view (example)

In general, the following information is available:

| | |
|-------------------|--|
| <i>Duration</i> | Session duration. |
| <i>Start time</i> | Session start time. |
| <i>End time</i> | Session end time. |
| <i>Comment</i> | Shows session comments which were made in the Sessions module. |

1. Click on the button  (*Load*) to start the replay of the session. See [chapter "Replay of a session", p. 35](#).
2. Click on the button  (*Export*) to export the session. See [chapter "Export session", p. 17](#).

3.3.3.1 Export session

1. Click on the icon  (*Export*).
⇒ The following window appears:

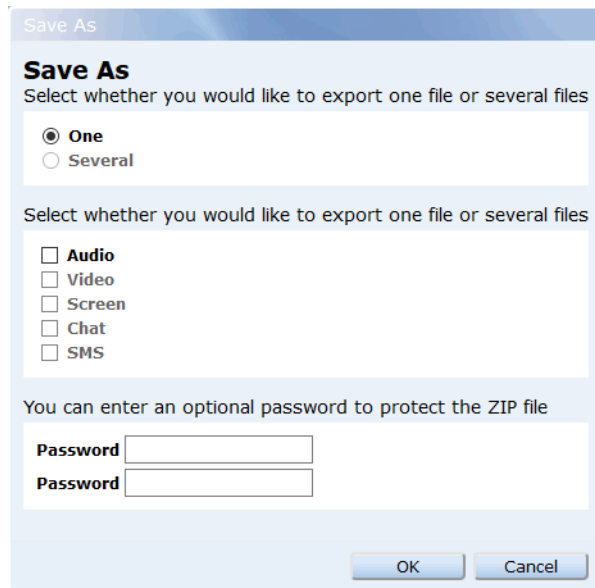


Fig. 9: Save as

2. Select the respective option in the window *Save As*.

| | |
|-----------------|---|
| <i>Single</i> | Mixes all recordings of one or several conversations in one file. |
| <i>Several</i> | Creates its own file for each recording to be saved. |
| <i>Audio</i> | Saves the audio data. |
| <i>Video</i> | Saves the video data . |
| <i>Screen</i> | Saves the screen recordings. |
| <i>Chat</i> | Saves a chat text. |
| <i>SMS</i> | Saves the SMS data. |
| <i>Password</i> | Protects the ZIP file with a password. |

3. Click on the button *OK*.
⇒ The following window appears:

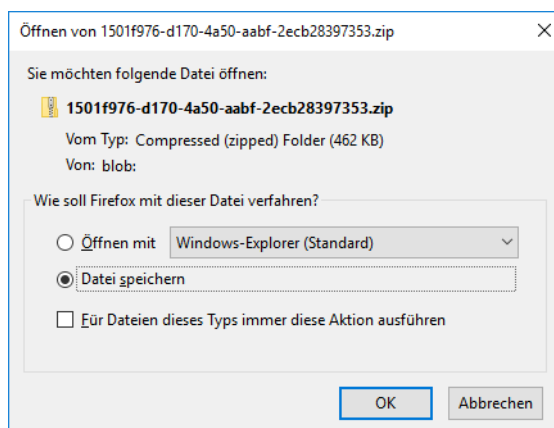


Fig. 10: Save conversations

4. Select the option *Save File*.
5. Click on the button *OK*.
⇒ The elements are exported to the local download directory in a ZIP file.
The ZIP file contains the following files:
The audio data is saved as [WAVE](#) file(s).

Audio data and screen recordings are saved as MP4 file(s).
 Video data is saved as MP4 file(s).
 Screen data is saved as MP4 file(s).
 The corresponding meta data is saved in the same directory as CSV file(s) under the same file name.
 Chat texts are saved as [XML](#) file(s).
 SMS data is saved as [XML](#) file(s).

3.3.4 Tab Training Packages

Here, you can assign, create, and accept training packages. Depending on the right of the user, different options can be chosen.

A training package which is created here will be listed in the Training Package module upon saving. The training package is assigned to the agent of the session.

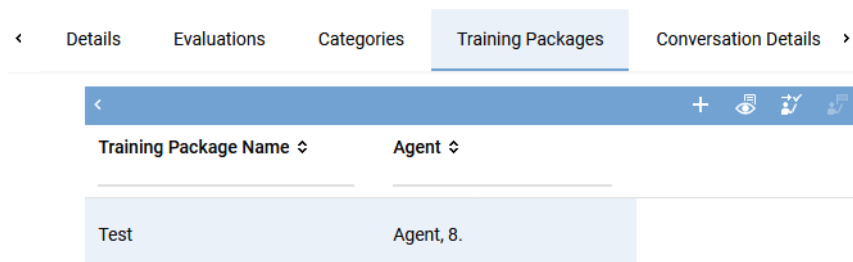







Fig. 11: Tab Training Packages (example)

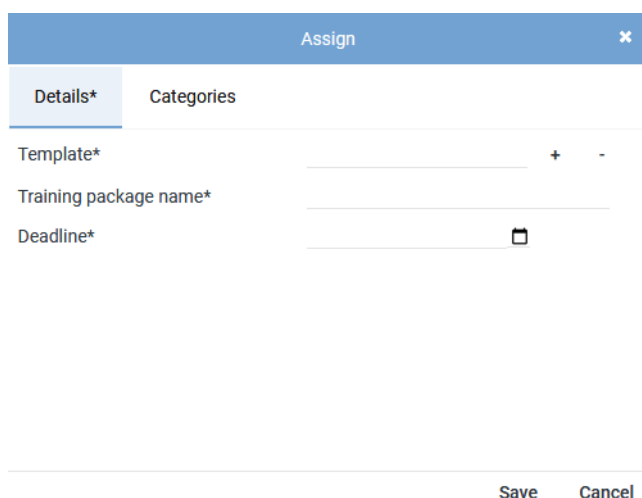
| | | |
|---|----------------------|--|
|  | Create/Assign | Here, you can create or assign a training package. You have 2 options: <ul style="list-style-type: none"> • <i>Assign</i>. See chapter "Assign Training Package", p. 19. • <i>Create/Assign</i>. See chapter "Create and assign training package", p. 23 |
|  | View | Here, you can view a training package which is already in the selection. See chapter "View training package", p. 25 . |
|  | Accept | Here, you can accept a training package. See chapter "Accept training package", p. 25 . (This function is only available for the agent who has been assigned the training package.) |
|  | Terminate | Here, you can finalize a training package. See chapter "Finalize training package", p. 26 . This option is only available if the training package has been started before. |



Only released training package templates can be assigned as training packages.

3.3.4.1 Assign Training Package

1. Select the tab *Training Packages* (see [chapter "Tab Training Packages", p. 19](#)).
2. To assign a new training package, click on the icon  (*Create/Assign*).
3. Select the option *Assign*.



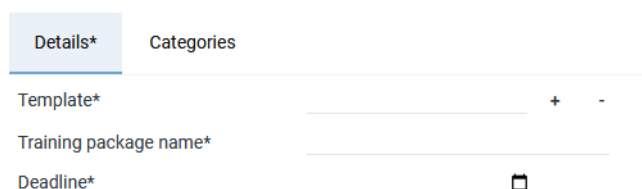
The dialog box titled "Assign" has a close button (X) in the top right corner. It contains two tabs: "Details*" (selected) and "Categories". Under the "Details*" tab, there are three input fields: "Template*" with a "+" and "-" button, "Training package name*", and "Deadline*" with a calendar icon. At the bottom right, there are "Save" and "Cancel" buttons.

Fig. 12: Assign Training Package

The detail view consists of the following tabs:

- Details
Here, you can define the details of a training package. See [chapter "Tab Details", p. 20](#).
 - Categories
Here, you can add categories to the training package. See [chapter "Tab Categories", p. 21](#)
4. To use the entries, click on the button *Save*.
 5. To discard the entries and close the window, click on the button *Cancel*.




3.3.4.1.1 Tab Details




The dialog box shows the "Details*" tab selected. It contains the same three input fields as Figure 12: "Template*" with "+" and "-" buttons, "Training package name*", and "Deadline*" with a calendar icon.

Fig. 13: Tab Details

Complete the 3 mandatory fields:

| | |
|------------------------------|---|
| Template | To add a training package template to the training package, click on the button  , see chapter "Add training package template", p. 20 . To delete a template from the training package, click on the button  . |
| Training package name | Enter a name for the training package. |
| Deadline | To add a deadline for working on a training package, enter the date directly via the keyboard or via the icon  . |

Add training package template

1. Select the tab *Details* (see [chapter "Tab Details", p. 20](#)).
2. Click on the button  (*Add*).

Details*

Categories

Template*

+

-

Training package name*

Deadline*

Fig. 14: Tab Details

3. Select a template from the list.

Training Package Templates

| Name ↕ | Created By ↕ | Visible ↕ | Version ↕ | Status ↕ | Cloned From ↕ |
|------------------|--------------|-----------|-----------|----------|---------------|
| No records found | | | | | |

<

Rows per page 20

0 - 0 of 0

1 < << >> >

Add Cancel

Fig. 15: Add training package template



Only released training package templates can be assigned as training packages.

4. To add a training package template to the training package, click on the button *Add*. To discard the selection and close the window, click on the button *Cancel*.

3.3.4.1.2 Tab Categories

Here, you can add or remove categories for the training package. If a category has already been selected in the training package template, it is added automatically for the training package.

Details*

Categories

Categories

+


-

| Name ↕ | Comment ↕ |
|-----------------------|--------------------|
| Aufzeichnungslösungen | analog und digital |

Fig. 16: Tab Categories

Add

Opens a window in which you can select and add categories, see [chapter "Assign category", p. 22](#).

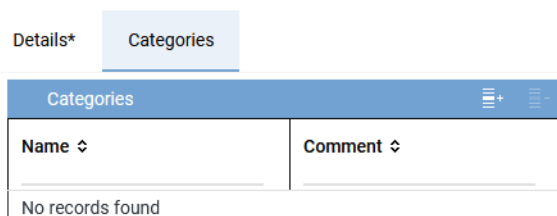
 **Remove** Removes the selected category from the list, see [chapter "Remove category assignment"](#), p. 22.



The categories for training packages and quizzes are created in the Templates module.


Assign category

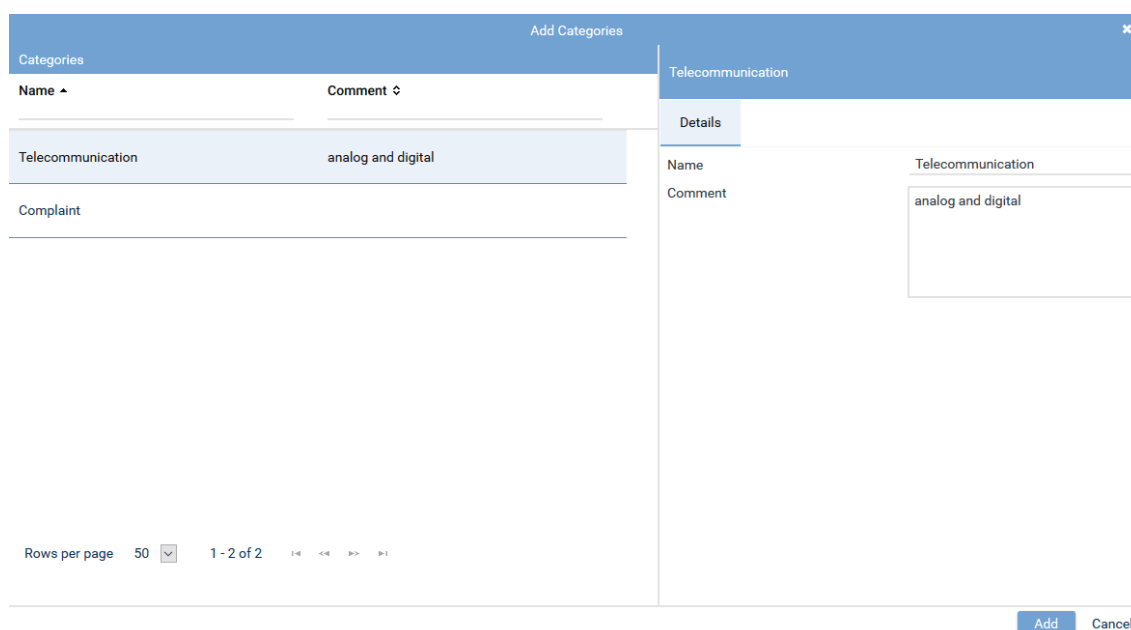
1. Select the tab *Categories*.



| Categories | |
|------------------|-----------|
| Name ↕ | Comment ↕ |
| No records found | |

Fig. 17: Add categories (example)

2. To assign categories, click on the icon  (*Add*).
3. Select one or several categories from the list.
To select several categories or to revoke the selection, click on the respective line while holding the [Ctrl] key down.



| Categories | | Add Categories | |
|-------------------|--------------------|---|--|
| Name | Comment | Telecommunication | |
| Telecommunication | analog and digital | <div>Details</div> <div> <div>Name</div> <div>Telecommunication</div> <div>Comment</div> <div>analog and digital</div> </div> | |
| Complaint | | | |

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Add Cancel

Fig. 18: Select categories


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

Remove category assignment


1. Select the tab *Categories*.

| Categories | |
|-----------------------|--------------------|
| Name ↕ | Comment ↕ |
| Aufzeichnungslösungen | analog und digital |

Fig. 19: Remove category assignment (example)

- To remove the assignment of a category to a training package, select the respective category in the list and click on the icon  (Remove).

3.3.4.2 Create and assign training package

- Select the tab *Training Packages* (see [chapter "Tab Training Packages", p. 19](#)).
- To create or assign a new training package, click on the icon  (Create/Assign).
- Select the option *Create/Assign*.
 - ⇒ The template generator opens.
- Set up the template according to your requirements.



For information about the template generator refer to the user manual *INSPIRATIONneo Template generator*.

- 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 following window appears:



| Details* | |
|--|---|
| Categories | |
| Edit Content  | |
| Name | Ad hoc |
| Training package name* | |
| Deadline* |  |
| <div>Save Cancel</div> | |

Fig. 20: Create ad hoc training package - detail view (example)

The detail view consists of the following tabs:

- Details
Here, you can define the details of a training package. See [chapter "Tab Details", p. 24](#).
- Agents (only in the Training Packages module)
Here, you can assign agents to the training package. See [chapter "Tab Agents", p. 77](#).
- Supervisors (only in the Calibrations module)
Here, you can assign additional supervisors to the training package. See [chapter "Tab Supervisors", p. 33](#).

- Categories
Here, you can add categories to the training package. See [chapter "Tab Categories", p. 24](#)
- 7. In the detail view, make all necessary settings within the tabs.
You can change tabs without buffering without risking the loss of your settings.
- 8. To assign the training package 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*.

3.3.4.2.1 Tab Details

Here, you can enter details of the training package.

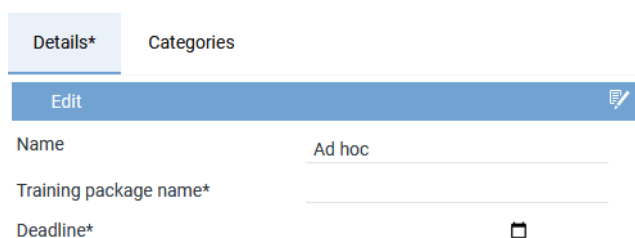



Fig. 21: Tab Details (example)

Complete the 3 mandatory fields:

| | |
|------------------------------|---|
| Name | Shows the name of the training package template. The name <i>Ad hoc</i> is predetermined and cannot be changed. The <i>ad hoc</i> training package template is created exclusively for this training package and cannot be used for other training packages. |
| Training package name | Enter a name for the training package. |
| Deadline | To add a deadline for working on a training package, enter the date directly via the keyboard or via the icon  . |

3.3.4.2.2 Tab Categories

Here, you can add or remove categories for the training package. If a category has already been selected in the training package template, it is added automatically for the training package.

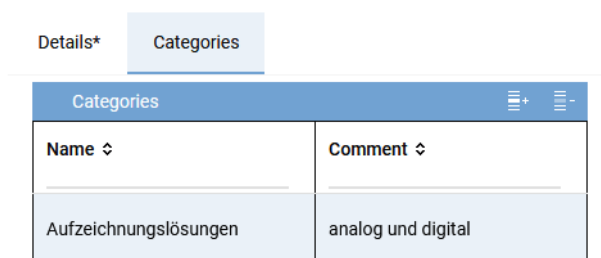




Fig. 22: Tab Categories

| | | |
|---|---------------|---|
|  | Add | Opens a window in which you can select and add categories, see chapter "Assign category", p. 22 . |
|  | Remove | Removes the selected category from the list, see chapter "Remove category assignment", p. 22 . |



The categories for training packages and quizzes are created in the Templates module.

3.3.4.3 View training package



A training package can only be viewed by the following persons:

- Creator of the training package
- Agents who have been assigned the training package
- Superuser

1. In the tab *Training Packages*, select the training package you would like to view.

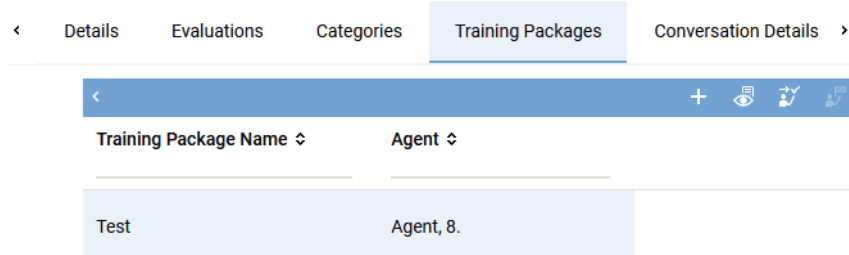



Fig. 23: Select training package (example)

2. Click on the icon  (*View*).
⇒ The window *Training Package* appears.

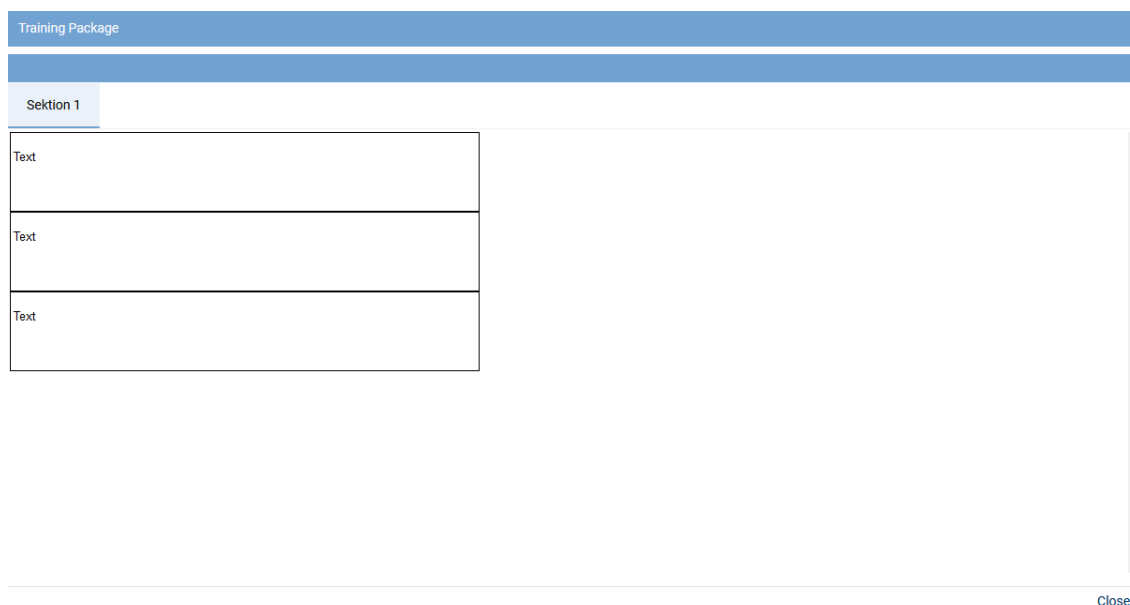



Fig. 24: View training package (example)

3. Here, you can view the training package.
To change the section in the training package window, click on the name of the section above the training package area.
4. To close the on-screen display, click on the button *Close*.
The training package can be viewed regardless of its status.

3.3.4.4 Accept training package



A training package can only be started by the user to whom it has been assigned.


1. In the tab *Training Package*, select the training package you would like to accept.
2. Click on the icon  (Accept).
3. The content of the training package is now displayed and can be edited. See [chapter "View training package", p. 25](#).

3.3.4.5 Finalize training package




A training package can only be finalized by the user to whom it has been assigned.

A training package can only be finalized after it has been accepted (see [chapter "Accept training package", p. 25](#)).

1. In the tab *Training Package*, select the training package you would like to finalize.
2. Click on the icon  (Finalize).

3.4 Delete evaluation

1. In the main view, select the evaluation you would like to delete.
2. Click on the icon  (Delete).
 - ⇒ A window which prompts you to confirm the deletion procedure appears.
3. Click on the button *Yes* in this window.

















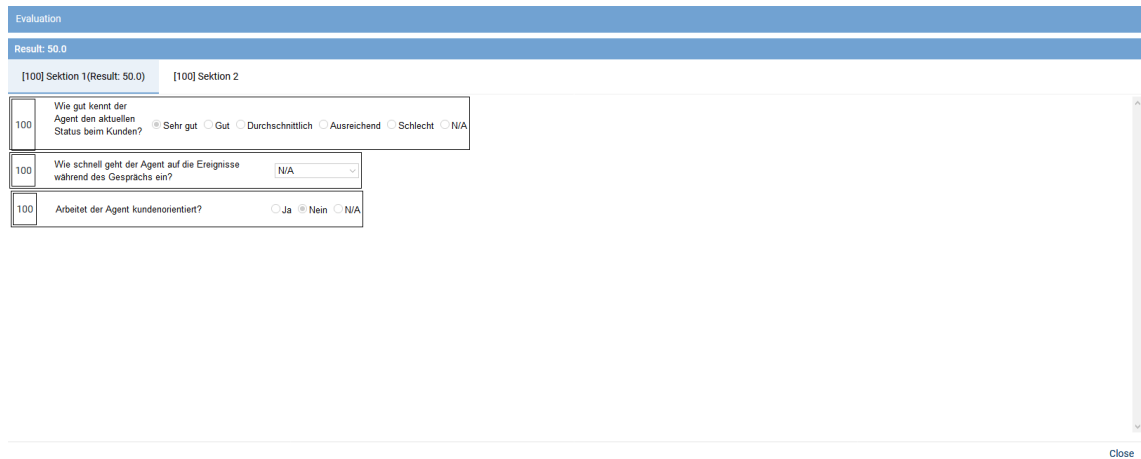
| Evaluations | | | | | | |
|-------------|-------------------|---|---|---|---|---------------|
| Agent Name | Created By | Template Name | Status | Kind Of Evaluation | Agent Feedback | Conversations |
| Agent, 5. | Admin, 1st-Tenant | Agentenbewertung Telefon |  |  |  | Call |
| Agent, 2. | Admin, 1st-Tenant | Testbewertung |  |  |  | Call |
| Agent, 1. | Admin, 1st-Tenant | Testbewertung |  |  |  | Call |
| Agent, 5. | Admin, 1st-Tenant | Do you really want to delete the selected object? Yes No |  |  |  | Call |
| Agent, 1. | Admin, 1st-Tenant | |  |  |  | Call |

Fig. 25: Delete evaluation

3.5 View evaluation

1. Select the respective evaluation in the main view.
2. Click on the icon  (View).
 - ⇒ The window *Evaluation* appears.



| Evaluation | |
|--------------------------------|---|
| Result: 50.0 | |
| [100] Sektion 1 (Result: 50.0) | [100] Sektion 2 |
| 100 | Wie gut kennt der Agent den aktuellen Status beim Kunden? <input checked="" type="radio"/> Sehr gut <input type="radio"/> Gut <input type="radio"/> Durchschnittlich <input type="radio"/> Ausreichend <input type="radio"/> Schlecht <input type="radio"/> N/A |
| 100 | Wie schnell geht der Agent auf die Ereignisse während des Gesprächs ein? <input type="text" value="N/A"/> |
| 100 | Arbeitet der Agent kundenorientiert? <input type="radio"/> Ja <input checked="" type="radio"/> Nein <input type="radio"/> N/A |

Close

Fig. 26: View evaluation

- Here, you can view the evaluation.
To change the section in the Evaluations window, click on the name of the section above the evaluation area.
- To close the evaluation, click on the button *Close*.

3.6 Carry out calibration evaluation

- To carry out a calibration evaluation, select the respective evaluation in the main view.
- Click on the menu item *Evaluations > Carry Out Calibration Evaluation* in the toolbar of the main view.
- Select one of the following options:

| | |
|------------------------------|---|
| Evaluate All | <p>This option allows evaluating the complete session.</p> <p>If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module.</p> <p>If a text message has been saved, then the SMS or SDS recording is displayed in a separate window of the Replay module.</p> <p>If a chat recording has been saved, then the chat text is displayed in the Message Viewer of the Replay module.</p> <p>If a video recording has been saved, then the video call is displayed in the Video Viewer of the Replay module.</p> |
| Evaluate Audio | <p>This option allows evaluating the audio part of the session. The call is loaded into the Replay module and can be replayed in parallel to the evaluation.</p> <p>The option is only active if a voice recording has been saved for the selected session.</p> |
| Evaluate Screen | <p>This option allows evaluating the screen content of the session. The screen recording is loaded into the Replay module and can be replayed in parallel to the evaluation.</p> <p>The option is only active if a screen recording has been saved for the selected session.</p> |
| Evaluate SMS/SDS Text | <p>This option allows evaluating an SMS or SDS. The SMS or SDS recording of the conversation is loaded into a separate window of the Replay module and can be viewed in parallel to the evaluation.</p> <p>The option is only active if a SMS or SDS recording has been saved for the selected session.</p> |

| | |
|---------------------------|--|
| <i>Evaluate Chat Text</i> | <p>This option allows evaluating a chat. The chat recording is loaded into the Replay module and can be viewed in Message Viewer parallel to the evaluation.</p> <p>The option is only active if a chat recording has been saved for the selected session.</p> |
| <i>Evaluate Video</i> | <p>This option allows evaluating the video part of the session. The video recording is displayed in the Video Viewer and can be replayed in parallel with the evaluation.</p> |

4. The window *Evaluation* appears.



Fig. 27: Create calibration evaluation

- Complete the evaluation template accordingly.
- To change the section in the evaluation template, click on the name of the section above the evaluation area.
- To apply the evaluation, click on the button *Apply*.
- Select whether the evaluation is supposed to be released by answering the security prompt with *Yes* or *No*.
- To close the evaluation, click on the button *Close*.
 - ⇒ The calibration evaluation is displayed in the table in the main view.

3.7



Re-evaluate

Only released evaluations can be re-evaluated.

- Select the respective evaluation in the main view.
- In the menu *Evaluations* of the toolbar, click on the menu item *Re-Evaluate*.
 - ⇒ The window *Evaluation* appears.



Fig. 28: Repeat evaluation

3. Complete the evaluation template accordingly.
4. To change the section in the evaluation template, click on the name of the section above the evaluation area.
5. During the evaluation you can replay the conversation in the Replay module. For information about the functions of the Replay module see [chapter "Replay module", p. 98](#).
6. To apply the evaluation, click on the button *Apply*.
7. Select whether the evaluation is supposed to be released by answering the security prompt with *Yes* or *No*.
8. To close the evaluation template, click on the button *Close*.
 - ⇒ The new re-evaluation is displayed in the table of the main view with the icon  (*Released*) in the column *Status*.
 - ⇒ The old evaluation is displayed in the table of the main view with the icon  (*Obsolete*) in the column *Status*.



A re-evaluation by an agent can only be released by a supervisor. As long as the re-evaluation has not been released, it can still be edited (see [chapter "Edit evaluation", p. 30](#)).

3.8 Assign mediation evaluation

This function allows evaluating an agent or a session again independently of another supervisor. The function is only active if the option Agent feedback has been activated in the evaluation template.

1. In the main view, select the evaluation you would like to assign to a mediation evaluator.
2. Click on the menu item *Evaluations > Assign Mediation Evaluation* in the toolbar of the main view.
 - ⇒ The following window appears:

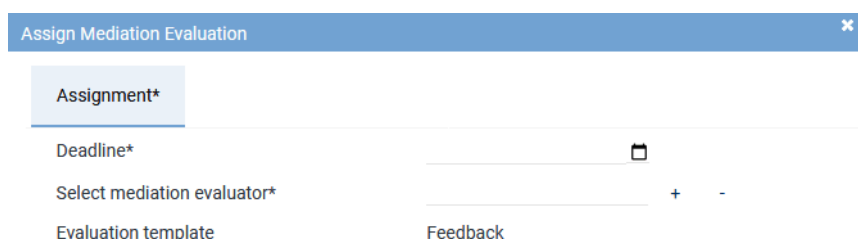


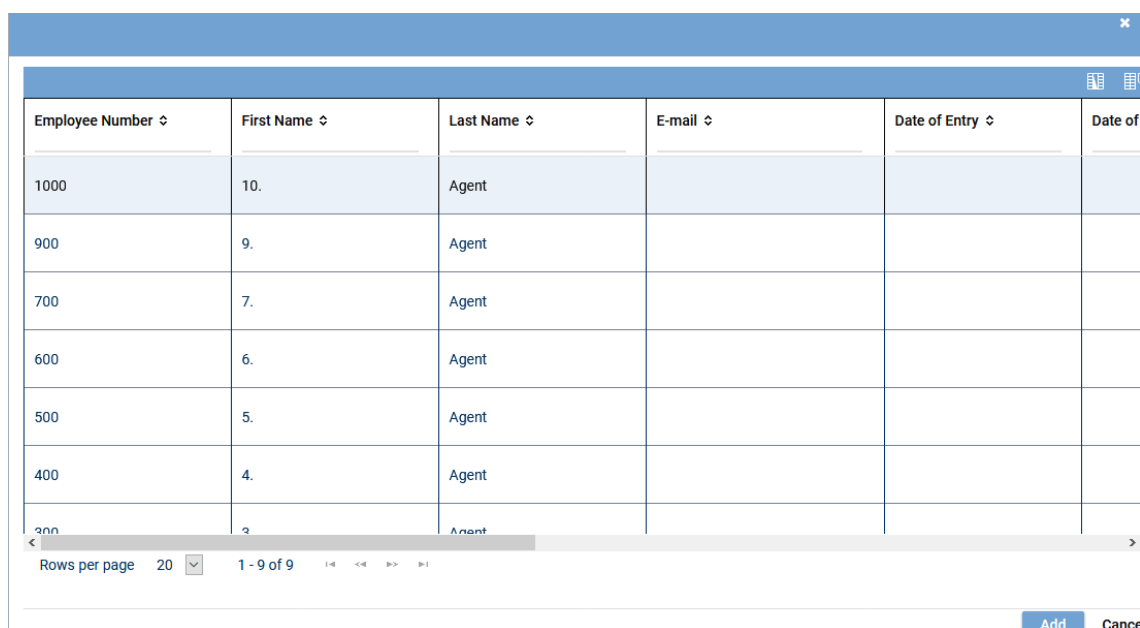


Fig. 29: Assign mediation evaluation

3. Click on the icon  and select a deadline for the mediation evaluation.
4. Click on the button  and select a supervisor as mediation evaluator.
⇒ The following window appears:




| Employee Number | First Name | Last Name | E-mail | Date of Entry | Date of |
|-----------------|------------|-----------|--------|---------------|---------|
| 1000 | 10. | Agent | | | |
| 900 | 9. | Agent | | | |
| 700 | 7. | Agent | | | |
| 600 | 6. | Agent | | | |
| 500 | 5. | Agent | | | |
| 400 | 4. | Agent | | | |
| 300 | 3. | Agent | | | |


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Add Cancel

Fig. 30: Add mediation evaluator

5. To add the selected supervisor as mediation evaluator, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.
 6. To remove the mediation evaluator, click on the button .
 7. To assign the mediation evaluation, click on the button *Assign*.
To discard the assignment of the mediation evaluation, click on the button *Cancel*.
- ⇒ A new evaluation (mediation evaluation) is created in the Evaluations module.
- ⇒ The original evaluation is marked as *Obsolete*.

3.9 Edit evaluation

1. Select an evaluation in the main view.
2. Adjust all necessary settings within the 4 tabs.
You can change tabs without buffering without risking the loss of your settings.
 - *Details*, see [chapter "Tab Details"](#), p. 14
 - *Agent Feedback*, see [chapter "Tab Agent Feedback"](#), p. 16.
 - *Assigned Sessions* see [chapter "Tab Assigned Session"](#), p. 17.
 - *Training Packages*, see [chapter "Tab Training Packages"](#), p. 19.
3. To save the settings, click on the button *Save*.
To reset all settings or changes in all tabs, click on the button *Reset*.
4. To open the selected evaluation and edit it, click on the icon  (*Edit*) in the detail view.
5. To save the changes, click on the button *Apply*.
To discard the changes, click on the button *Cancel*.



You can only edit an evaluation as long as it has the status *Draft*.

3.10 Release evaluation

1. Select the respective evaluation in the main view.

2. In the menu *Evaluations* of the toolbar, click on the menu item *Release Evaluation*.
⇒ The evaluation is released.

3.11 Create calibration

If the results of the evaluations differ significantly, you can calibrate the session.

1. Select the respective evaluation in the main view.
2. Click on the menu item *Sessions > Calibrate* in the toolbar.
⇒ The window *Create calibration* appears.
3. Adjust all necessary settings within the 3 tabs.
You can change tabs without buffering without risking the loss of your settings.
 - *Details*, see [chapter "Tab Details"](#), p. 31
 - *Evaluations*, see [chapter "Tab Evaluations"](#), p. 32
 - *Supervisors*, see [chapter "Tab Supervisors"](#), p. 33.
4. To save the settings, click on the button *Save*.
To discard the changes, click on the button *Cancel*.

3.11.1 Tab Details

Here, you can display and edit detailed information about the selected calibration.

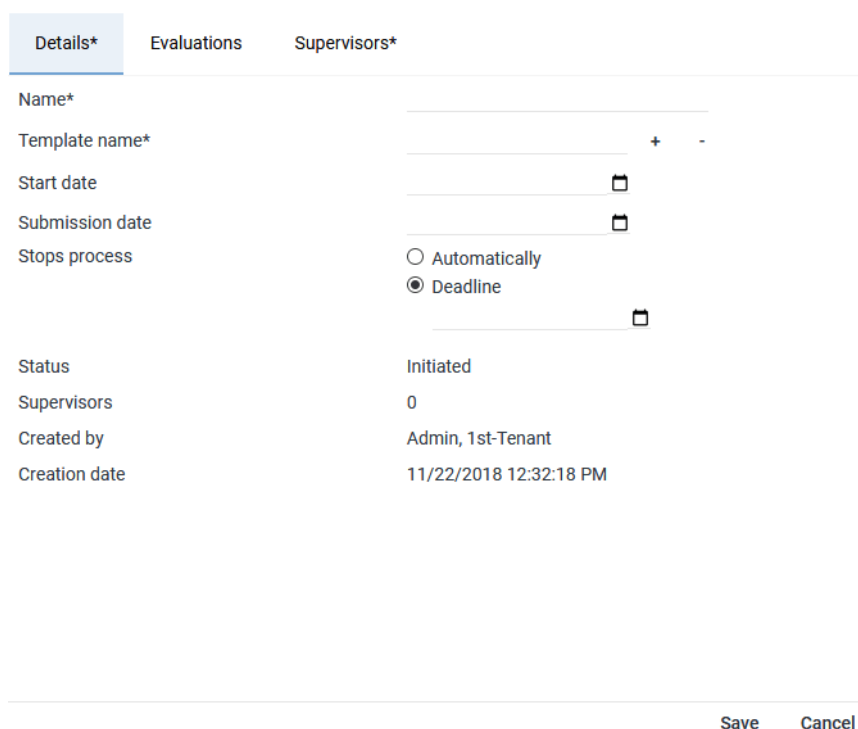


Fig. 31: Calibration - detail view (example)

In general, the following information is available:

| | |
|------------------------|--|
| <i>Name</i> | Name of the calibration. Enter the name of the calibration. |
| <i>Template name</i> | Name of the template. The button + allows adding a template to the calibration. |
| <i>Start date</i> | Start date of the calibration. Select the date. |
| <i>Submission date</i> | Delivery date of the calibration evaluations. Select the date. |
| <i>Stops process</i> | Shows the stop mode. <ul style="list-style-type: none"> • Automatically |

| | |
|----------------------|--|
| | <p>The calibration ends automatically when all calibration evaluations have been submitted.</p> <ul style="list-style-type: none"> • Deadline <p>The calibration ends on a fixed deadline. The deadline can be used to create a reference evaluation in the meantime, for instance, and to make an assessment or start a discussion.</p> |
| Status | <p>Shows the editing status of the calibration.</p> <p>Possible options:</p> <ul style="list-style-type: none"> • <i>Initiated</i> • <i>Started</i> • <i>Pending</i> • <i>Finished</i> |
| Supervisors | Shows the number of the supervisors who are involved in the calibration process. |
| Created by | Name of the user who has created the calibration. |
| Creation date | Date on which the calibration was created. |

3.11.2 Tab Evaluations

Here, you can create, edit, and view a reference evaluation. All evaluations of the supervisors continue to be displayed. Depending on the status of the calibration, you can view the evaluations.

Details
Assigned Session
Supervisors*
Evaluations

Reference Evaluation
+




The reference evaluation has not been executed.

| Evaluations | |
|--------------|----------|
| Created By ↕ | Result ↕ |
| Agent, 80. | |



Save
Reset

Fig. 32: Tab Evaluations (example)

Reference evaluation


| | | |
|---|---------------|--|
|  | Create | Open the evaluation template. Enter your reference evaluation. See chapter "Create reference evaluation", p. 33 |
|  | Edit | Opens the reference evaluation. You can edit the reference evaluation until you release it. See chapter "Edit reference evaluation", p. 33 |
|  | View | Here, you can view the reference evaluation. |

Evaluations

| | | |
|---|-------------------------|--|
|  | View | Here, you can view the evaluation. |
|  | Print evaluation | Here, you can print the evaluation. See chapter "Print evaluation", p. 36. |

In the column Result, you see the result of the evaluations.

3.11.2.1 Create reference evaluation

1. Click on the icon  (*Create*).
⇒ The window *Evaluation* appears.
2. Create the reference evaluation on the basis of the session.
3. Click the button *Apply*.
⇒ The confirmation window appears. Decide whether you would like to release the evaluation or save it as a draft.

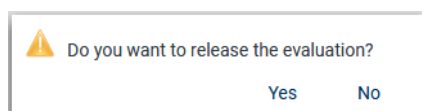



Fig. 33: Confirmation window for the reference evaluation

4. Click on the button *Yes* to release the reference evaluation.
Click on the button *No* to save the reference evaluation as a draft.
5. Click on the button *Save*.

3.11.2.2 Edit reference evaluation

1. Click on the icon  (*Edit*).
⇒ The window *Evaluation* appears.
2. Change the reference evaluation on the basis the session.
3. Click the button *Apply*.
⇒ The confirmation window appears. Decide whether you would like to release the evaluation or continue to save it as a draft.

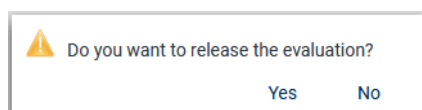


Fig. 34: Confirmation window for the reference evaluation

4. Click on the button *Yes* to release the reference evaluation.
Click on the button *No* to save the reference evaluation as a draft.
5. Click on the button *Save*.

3.11.3 Tab Supervisors

Here, you can add and delete supervisors and view the evaluations that the supervisors have made.

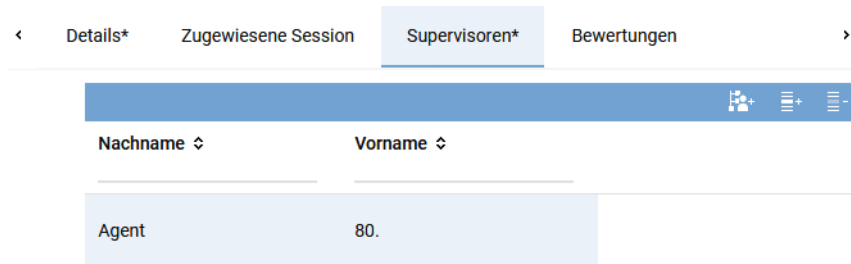






Fig. 35: Tab Supervisors (example)

| | | |
|---|--|---|
|  | <i>Add from organization structure</i> | Opens a window in which you can add more supervisors from the organization structure. See chapter "Add supervisors from the organization structure", p. 53. |
|  | <i>Add</i> | Here, you can add supervisors. See chapter "Add supervisors", p. 54. |
|  | <i>Delete</i> | Deletes the selected supervisor. |

3.12 Finalize calibration evaluation

To finalize your calibration evaluation, proceed as follows.

1. Select an open evaluation in the main view.
2. Click on the icon  (*Finalize calibration evaluation*).
⇒ The calibration evaluation is finished. The evaluation cannot be changed anymore.

3.13 Create summary

This function allows displaying the essential information of an evaluation in a table and printing it.






1. Select the respective evaluation in the main view.
2. 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. 36: Load summary (example)

The following functions are available:

| | |
|--|------------------------------------|
|  | Shows the content of the section. |
|  | Hides the content of the section. |
|  | Prints the summary. |
|  or  | Closes the window <i>Summary</i> . |

3.14 Replay of a session

- Click on the menu item *Training Packages > Load or Coaching Advisor > Load* in the toolbar.
- Select one of the following options:


| | |
|------------------------------|--|
| <i>Load All</i> | <p>The entire recorded session is loaded into the Replay module.</p> <p>If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module.</p> <p>If a text message has been saved, then the SMS or SDS recording is displayed in a separate window of the Replay module.</p> <p>If a chat recording has been saved, then the chat text is displayed in the Message Viewer of the Replay module.</p> <p>If a camera recording has been saved, then the camera video is displayed in the Video Viewer of the Replay module.</p> |
| <i>Load Audio</i> | <p>The voice recording of the session is loaded into the Replay module.</p> <p>This option is only active if a voice recording has been saved for the selected session.</p> |
| <i>Load Screen Recording</i> | <p>The screen recording of the session is loaded into the Video Viewer of the Replay module.</p> |

| | |
|--------------------------|---|
| | This option is only active if a screen recording has been saved for the selected session. |
| <i>Load SMS/SDS Text</i> | <p>The SMS or SDS recording of the session is loaded into a separate window of the Replay module.</p> <p>This option is only active if an SMS or SDS recording has been saved for the selected session.</p> |
| <i>Load Chat Text</i> | <p>The chat recording of the session is loaded into the Message Viewer of the Replay module.</p> <p>This option is only active if a chat recording has been saved for the selected session.</p> |
| <i>Load Video</i> | <p>The camera recording of the session is loaded into the Video Viewer of the Replay module.</p> <p>This option is only active if a camera recording has been saved for the selected session.</p> |

- The session is loaded into the Replay module and can be replayed there.
For information about the functions of the Replay module see [chapter "Replay module"](#), p. 98.

3.15 Print evaluation

This function allows printing the selected evaluation.

- Click on the icon  (*Print evaluation*).
⇒ The print preview appears.
- To cancel the printing process, click on the button *Cancel*.
To continue the printing process, click on the button *Print*.
⇒ The window *Print* appears.

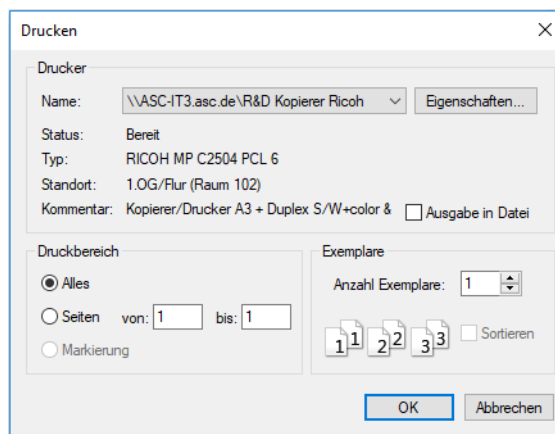



Fig. 37: Print (example)

- Set the respective print options.
- To start printing, click on the button *OK*.
To cancel the printing process, click on the button *Cancel*.

3.16 Give agent feedback

You can give feedback to your evaluation. Not confirmed evaluations are marked with the icon  in the main view in the column *Agent feedback*.

- ✓ The option *Enable agent feedback* has to be activated in the template.
- In the main view, select the evaluation for which you would like to give an agent feedback.
 - Click on the tab *Agent Feedback*.

⇒ The following window appears:

| Details | Agent Feedback | Assigned Session | Training Packages |
|--------------------|---------------------|------------------|-------------------|
| Feedback | <div></div> | | |
| Agent confirmation | Not yet confirmed ▾ | | |

Fig. 38: Give agent feedback

3. In the field *Feedback*, you can enter a comment to your evaluation.
4. Select one of the following options from the drop-down list *Agent confirmation*:
 - *N/A*
 - *Agree*
 - *Disagree*
5. Click on the button *Save*.

3.17

Override agent feedback

Users with the appropriate rights can overrule an existing agent feedback.

1. Select the appropriate session.
2. Activate the check box *Overruled*.

⇒ A comment field appears. Here, you can enter a comment.

| Details | Agent Feedback | Assigned Session | Training Packages |
|--------------------|---------------------------|------------------|-------------------|
| Feedback | Bewertung nicht sachlich! | | |
| Agent confirmation | Disagree | | |
| Overruled | <input type="checkbox"/> | | |

Fig. 39: Override agent feedback

3. Click on the button *Save*.

⇒ In the field *Agent confirmation*, *Overruled* is displayed.

4 Calibrations module

4.1 General

The Calibrations module enables the user to create, administrate, and analyze calibrations. All calibrations are displayed which have been initiated via the Calibrations module, the Evaluations module or the Sessions module.

Only supervisors can be selected for a calibration evaluation. Every supervisor receives a notification and can make the calibration evaluation in the Evaluations module.

The decision to calibrate an evaluation can have different reasons: One could be that the evaluation of one supervisor differs notably from the evaluation of another supervisor although they have evaluated the same session. Another reason could be that the evaluation criteria are supposed to be validated and adjusted. Then the evaluation results have to be compared. Or the objective is to validate the comprehensibility of the evaluation template to ensure that all supervisors understand and use the template in the same way. In either case, the analysis of evaluations is the focus of the Calibrations module. Depending on the results of the calibration, the quality manager of the contact center can take measures to standardize and even improve the evaluation process.

If the different calibration evaluations come to a similar result, a discussion based on a reference evaluation may help to calibrate the evaluation. Such a reference evaluation can be included in each calibration process.

If the different calibration evaluations do not come to similar results, the calibration report can only be used to discuss the results of the calibration process and to analyze the reasons for the different conclusions. The respective supervisors assess and discuss the results without the software, e. g. in a team meeting. After such a team meeting, measures should be initiated to level future evaluations; one possibility would be to adjust the evaluation template if supervisors have interpreted it in a different way. Another could be a training for supervisors if they are uncertain of how to correctly use the evaluation template. Once the evaluation template or the evaluation process has been adapted to the results of the calibration process, it is important to check in a timely manner whether the initiated measures have produced the desired results.

The calibration process

The Calibrations module allows quality managers to initiate a calibration. First they have to select the session they would like to calibrate before defining the settings of the calibration. Among these settings are selecting the evaluation template as well as the supervisors who are supposed to evaluate the session. A reference evaluation can be created, too. Once the calibration settings have been adjusted, the involved supervisors can be informed about the pending evaluation for calibrating purposes. As soon as the evaluations have been completed within a set period of time, the analysis and comparison of the evaluations on basis of a reference evaluation can begin. It is also possible to use reports to visualize the results of the calibration.

Every time that a calibration is initiated, a new process is generated in the Calibrations module. The quality manager of the contact center thus obtains an overview of current and past calibrations in the main view of the module. The main view does not only display finished calibrations but pending and started calibration processes, too.

Calibration results

As a result of the calibration process, the evaluation template is usually adapted to the new findings. In this case, users do not have to access the Evaluation Templates module. Instead they can edit the evaluation template directly in the Calibrations module. The new version of the template is automatically made available in the Evaluation Templates module, too. As soon as the new version of a template is released, its previous version is deactivated automatically. Furthermore, the supervisor can directly assign training packages to another supervisor in the Calibrations module, if required.



Only those employees are displayed as *supervisors* who have been assigned the role *Supervisor* by the administrator.

4.1.1 Reasons for a calibration

In the following cases, a calibration is reasonable:

- The evaluation of a supervisor differs extremely from other evaluations.
- The evaluations are not consistent.
- You would like to compare the evaluation standards of different supervisors.
- You would like to check the comprehensibility of the evaluation templates.

A decisive part of the calibration process is the analysis of the evaluations during the calibration process.

Exemplary results of the calibration process:

- All supervisors have evaluated the session with almost the same result.
=> No additional measures are necessary.
- The session was evaluated by all supervisors, but the results differ from the reference evaluation of the quality manager:
 - Case 1: The majority of the supervisors has made the same evaluation.
 - Case 2: There are 2 groups with different results.
 - Case 3: There is no common tendency in the evaluations of the supervisors.
 - Case 4: All evaluations of the supervisors are different in contrast to the reference evaluation.

In the first 3 cases, the quality manager should consult the supervisors to find out the reasons for the different results of the evaluations. There are the following possibilities to support quality managers in the analysis:

- He makes a reference evaluation to present the supervisors his view of the evaluation.
- He publishes the calibration report.



The calibration report can only be opened in the Reports module.



Publishing the supervisors' evaluations is not necessarily a sensible thing to do for every supervisor. Instead, the analysis should preferably take place in team meetings.

In case 4, the quality manager cannot use the reference evaluation for analysis purposes. In this case, a calibration report is necessary to determine the reason for the different evaluation results.

4.1.1.1 Measures based in the analysis

- Discussing the results of the calibration process and of the analysis run by the quality manager in a team meeting.
- Modifying of the evaluation template if the content (score distribution etc.) is not clear.
- Organizing trainings for the supervisors.
- If required, repeating the calibration process to validate the taken measures.

4.1.2 Calibration process

In the calibration process, there are 2 roles:

- Quality manager
 - Decides whether a calibration is executed.

- Selects the session for the calibration process.
- Defines the characteristics of the calibration process.
- Select the evaluation template.
- Creates a reference evaluation (optional).
- Selects the supervisors for the calibration process.
- Starts the calibration process.
- Checks the incoming evaluations or compares the evaluations of the supervisors to the reference evaluation (optional).
- Can stop the calibration process.
- Creates a new version of the evaluation template (optional).
- Assigns training packages or creates new training packages.
- Supervisor
 - Edits the assigned evaluation.
 - Hands in the evaluation.

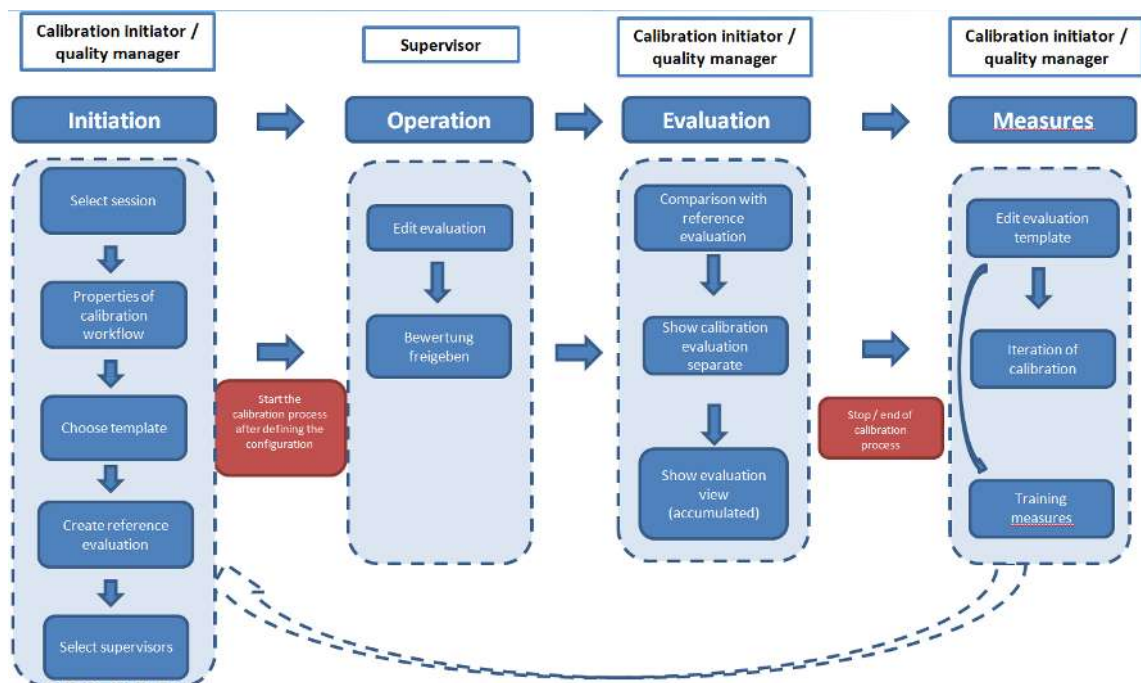


Fig. 40: Procedure of a calibration process

The calibration process can be initiated via the following modules:

- Sessions module
- Evaluations module
- Calibrations module

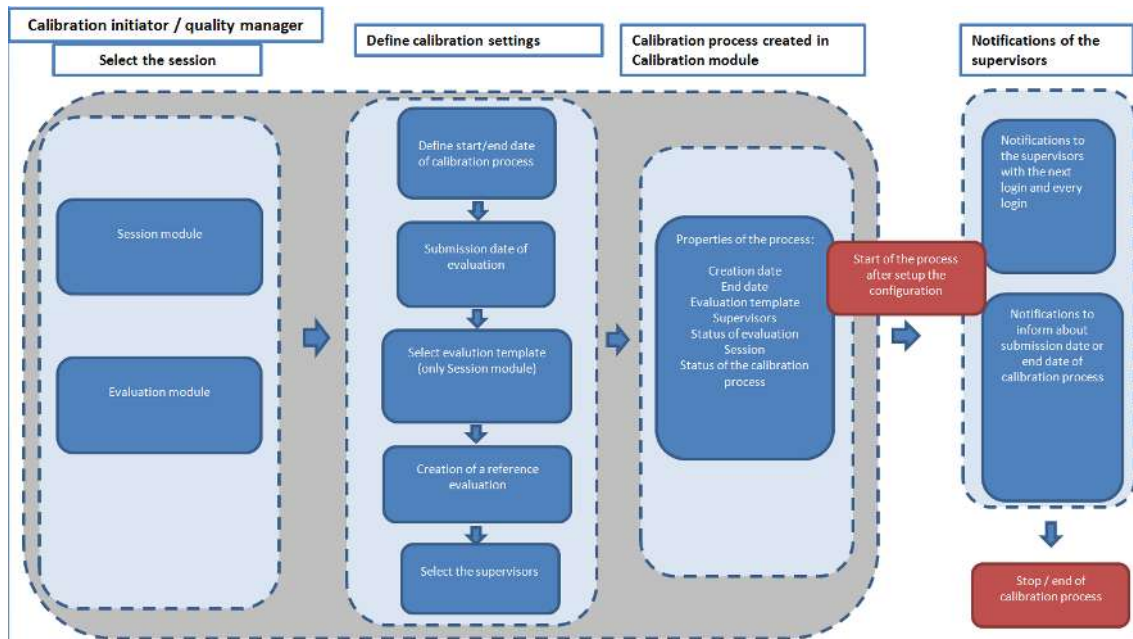


Fig. 41: Initiating a calibration process



Only evaluations of sessions can be calibrated.

After the beginning of the calibration process, all supervisors are informed about its start, about the open evaluations they have been assigned and about the deadline upon logging in. The quality manager receives status notifications about the current state of the calibration process.

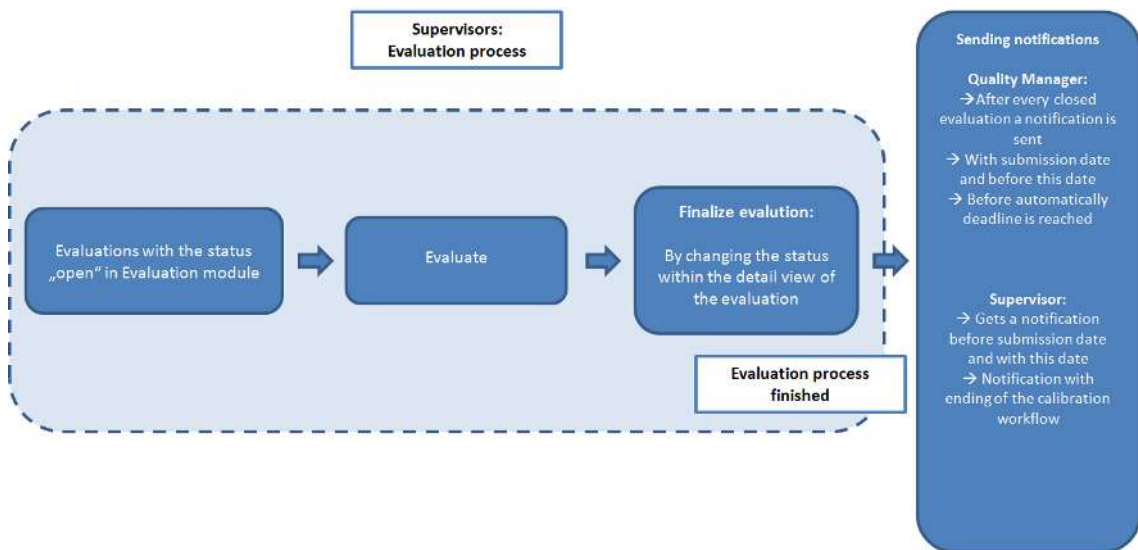


Fig. 42: Calibration process from the perspective of a supervisor

After finishing the last evaluation, the analysis of the calibration process starts. There are different possibilities to analyze the results:

- Comparing the incoming evaluations with the reference evaluation.
- Having the quality manager open all single evaluations which have been made.
- Analysis via the Reports module. In the reports, the quality manager receives detailed diagrams containing precise results.

4.2

Main view

In the main view, all saved calibrations are displayed.







If conversation rules (view filters) apply for the logged-in user, then the main view only contains those entries which comply with these conversation rules.

| Calibration Name ↕ | Template Name ↕ | Created By ↕ | Status ↕ | Stops Automatically ↕ | Start Date ↕ |
|--------------------|--------------------------|-------------------|----------|-----------------------|--------------|
| Kalibrierung | Agentenbewertung Telefon | Admin, 1st-Tenant | * | ✓ | |
| Kalibrierung | Testbewertung | Agent, 80. | * | ✓ | |
| Kalibrierung | Feedback | Agent, 80. | * | ✓ | |
| Kalibrierung | Feedback | Admin, 1st-Tenant | * | ✓ | |

Rows per page 50 1 - 4 of 4

Fig. 43: Calibrations - main view

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

| | |
|----------------------------|--|
| Calibration Name | Name of the calibration. |
| Template Name | Name of the evaluation template used for the calibration. |
| Created By | Name of the user who has created the calibration. |
| Status | Shows the status of the calibration. * = Calibration has been initiated.  = Calibration has been started manually.  = Calibration is pending.  = Calibration has been finished. |
| Stops Automatically | Shows the type of the evaluation. ✓ = Calibration is stopped automatically.  = Calibration is stopped on a deadline. |
| Start Date | Date on which the calibration starts. |
| Submission Date | Date on which all evaluations must have been submitted. |
| Deadline | Date on which the calibration is finished. |
| Creation Date | Date on which the calibration was created. |
| Updated | Date on which the calibration was updated for the last time. |

4.2.1

Toolbar of the main view

The toolbar offers the following functions.

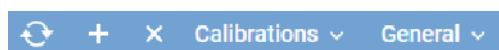





Fig. 44: Toolbar Calibrations module



| | | |
|---|----------------|---|
|  | Refresh | Refreshes the main view. |
|  | Create | Creates a calibration. See chapter "Create calibration", p. 50. |
|  | Delete | Deletes the selected calibration. See chapter "Delete calibration", p. 51. |





| | | |
|---------------------|---|---|
| <i>Calibrations</i> | <i>Start</i> | Starts a calibration. See chapter "Start calibration", p. 51. |
| | <i>Exit</i> | Stops the selected calibration. See chapter "Stop calibration", p. 51. |
| | <i>Assign/Create Training Package</i> | Creates a new training package or assigns a training package. See chapter "Assign/Create training package", p. 51. |
| | <i>Create New Version of the Template</i> | Creates a new version of an existing evaluation template. See chapter "Create new version of a template", p. 56. |
| <i>General</i> | <i>Print</i> | Prints the table of the main view. |
| | <i>Adjust Table</i> | Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page |
| | <i>Save Table Configuration</i> | Saves the current table configuration of the main view as default view of the user. |
| | <i>Search</i> | Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see chapter "Search", p. 12. |
| | <i>Reset Search</i> | Resets all manually entered search criteria. The search is started without manual filter settings. |
| | <i>General Help</i> | By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened. |
| | <i>Module Help</i> | By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened. |



In the user manual *INSPIRATIONneo - General information*, you find detailed descriptions of the default functions such as *Print*, *Adjust table* or *Help* if required.

4.2.2 Icons of the calibrations table

| | | |
|---|------------------|---|
|  | <i>Initiated</i> | Shows that the calibration has been initiated. No notification is sent to the supervisors. The quality manager can change all characteristics of the calibration process. No open or empty calibration evaluations are created. |
|  | <i>Started</i> | Shows that the calibration has been started. The calibration can be started manually at any point in time or automatically upon reaching the start date. The supervisors are automatically informed about their open evaluations. After starting a calibration, the quality manager can execute the following changes: <ul style="list-style-type: none"> • Change calibration name • Change delivery date • Change process (automatically/deadline) • Add or delete supervisors • Create reference evaluation |

| | | |
|---|-----------------|---|
| | | <ul style="list-style-type: none"> Release reference evaluation (only possible after all evaluations have been finished) Stop calibration manually |
|  | <i>Pending</i> | Shows that the calibration is pending. |
|  | <i>Finished</i> | Shows that the calibration has been finished. The calibration stops in the following cases: <ul style="list-style-type: none"> The delivery date has been reached and <i>Process stops automatically</i> has been selected. All calibration evaluations have been handed in and <i>Process stops automatically</i> has been selected. The selected has been reached. The quality manager stops the calibration manually. |
|  | | Shows that the calibration is stopped automatically. |
|  | | Shows that the calibration is stopped on the deadline. |

4.3 Detail view

4.3.1 Tab Details

Here, you can display and edit detailed information about the selected calibration.

The displayed information depend on the status of the calibration.

Details*

Assigned Session

Supervisors*

Evaluations

Name*

Template name

Start date

Submission date

Stops process

Status

Supervisors


Created by

Creation date

Kalibrierung

Testbewertung

12/10/2018



☒ Automatically
 ☐ Deadline

Started

1

Agent, 80.

12/10/2018 1:51:23 AM

Save

Reset

Help

Fig. 45: Calibrations - detail view - status started (example)

You can edit a calibration as long as the calibration has not been finished.

Depending on the status of the calibration (initiated, started, pending), you can edit the individual parameters.

The following information is displayed for open calibrations:

| | |
|----------------------|--------------------------------|
| <i>Name</i> | Name of the calibration. |
| <i>Template name</i> | Name of the template. |
| <i>Start date</i> | Start date of the calibration. |

| | |
|------------------------|---|
| <i>Submission date</i> | Delivery date of the calibration evaluations. |
| <i>Stops process</i> | Shows the stop mode. <ul style="list-style-type: none"> Automatically The calibration ends automatically when all calibration evaluations have been submitted. Deadline The calibration ends on a fixed deadline. The deadline can be used to create a reference evaluation in the meantime, for instance, and to make an assessment or start a discussion. |
| <i>Status</i> | Shows the editing status of the calibration. Possible options: <ul style="list-style-type: none"> <i>Initiated</i> <i>Started</i> <i>Pending</i> <i>Finished</i> |
| <i>Supervisors</i> | Shows the number of the supervisors who are involved in the calibration process. |
| <i>Created by</i> | Name of the user who has created the calibration. |
| <i>Creation date</i> | Date on which the calibration was created. |

Details
Assigned Session
Supervisors*
Evaluations

Help

| | |
|------------------|-----------------------|
| Calibration name | Kalibrierung |
| Template name | Feedback |
| Start date | 12/10/2018 |
| Submission date | |
| Deadline | |
| Status | Finished |
| Supervisors | 1 |
| Created by | Agent, 80. |
| Creation date | 12/10/2018 1:50:43 AM |

Save
Reset

Fig. 46: Calibrations - detail view - status finished (example)

The following information is displayed for already finished calibrations:

| | |
|-------------------------|--|
| <i>Calibration name</i> | Name of the calibration. |
| <i>Template name</i> | Name of the template. |
| <i>Start date</i> | Start date of the calibration. |
| <i>Submission date</i> | Delivery date of the calibration evaluations. |
| <i>Deadline</i> | Shows the deadline (if selected). |
| <i>Status</i> | Shows the editing status of the calibration. Possible options: <ul style="list-style-type: none"> <i>Initiated</i> <i>Started</i> |

| | |
|----------------------|---|
| | <ul style="list-style-type: none"> • <i>Pending</i> • <i>Finished</i> |
| <i>Supervisors</i> | Shows the number of the supervisors who are involved in the calibration process. |
| <i>Created by</i> | Name of the user who has created the calibration. |
| <i>Creation date</i> | Date on which the calibration was created. |

4.3.2 Tab Assigned Session

Here, you can replay and save the assigned session as well as display detailed information.

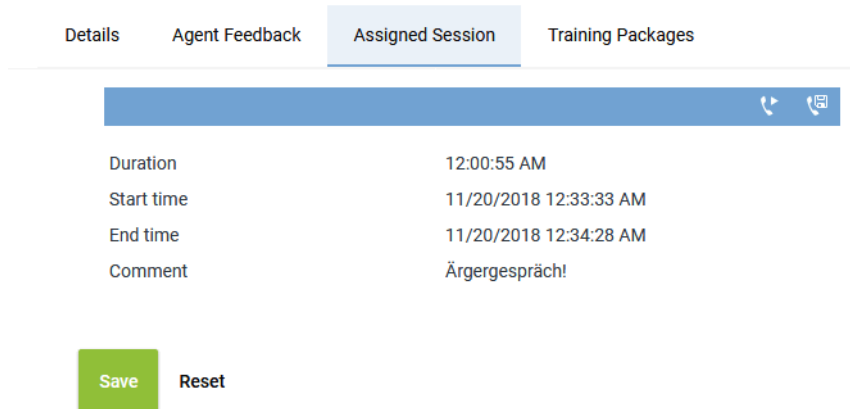





Fig. 47: Assigned session - detail view (example)

In general, the following information is available:

| | |
|-------------------|--|
| <i>Duration</i> | Session duration. |
| <i>Start time</i> | Session start time. |
| <i>End time</i> | Session end time. |
| <i>Comment</i> | Shows session comments which were made in the Sessions module. |

1. Click on the button  (*Load*) to start the replay of the session. See [chapter "Replay of a session", p. 61](#).
2. Click on the button  (*Export*) to export the session. See [chapter "Export session", p. 46](#).

4.3.2.1 Export session

1. Click on the icon  (*Export*).
⇒ The following window appears:

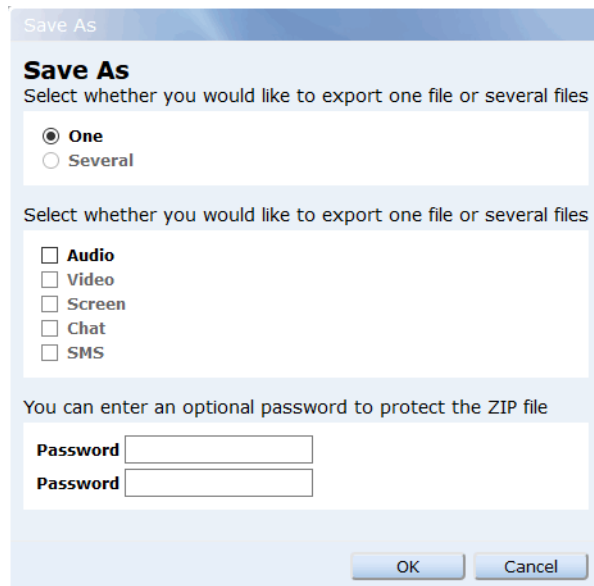


Fig. 48: Save as

2. Select the respective option in the window *Save As*.

| | |
|-----------------|---|
| <i>Single</i> | Mixes all recordings of one or several conversations in one file. |
| <i>Several</i> | Creates its own file for each recording to be saved. |
| <i>Audio</i> | Saves the audio data. |
| <i>Video</i> | Saves the video data . |
| <i>Screen</i> | Saves the screen recordings. |
| <i>Chat</i> | Saves a chat text. |
| <i>SMS</i> | Saves the SMS data. |
| <i>Password</i> | Protects the ZIP file with a password. |

3. Click on the button *OK*.
⇒ The following window appears:

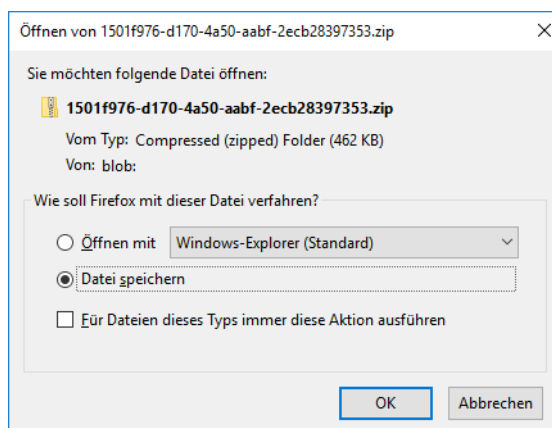


Fig. 49: Save conversations

4. Select the option *Save File*.
5. Click on the button *OK*.
⇒ The elements are exported to the local download directory in a ZIP file.
The ZIP file contains the following files:
The audio data is saved as [WAVE](#) file(s).

Audio data and screen recordings are saved as MP4 file(s).
 Video data is saved as MP4 file(s).
 Screen data is saved as MP4 file(s).
 The corresponding meta data is saved in the same directory as CSV file(s) under the same file name.
 Chat texts are saved as [XML](#) file(s).
 SMS data is saved as [XML](#) file(s).

4.3.3 Tab Supervisors

Here, you can add and delete supervisors and view the evaluations that the supervisors have made.

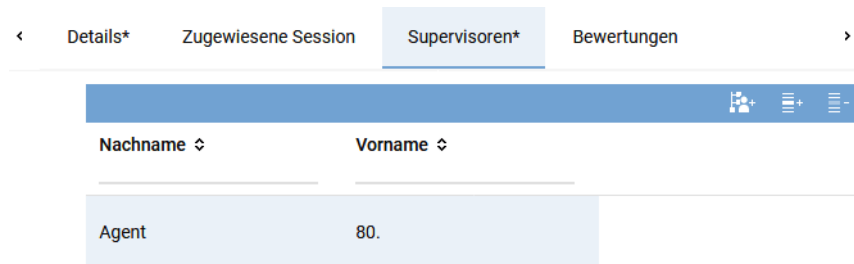





Fig. 50: Tab Supervisors (example)

| | | |
|---|--|--|
|  | <i>Add from organization structure</i> | Opens a window in which you can add more supervisors from the organization structure. See chapter "Add supervisors from the organization structure", p. 53 . |
|  | <i>Add</i> | Here, you can add supervisors. See chapter "Add supervisors", p. 54 . |
|  | <i>Delete</i> | Deletes the selected supervisor. |

4.3.4 Tab Evaluations

Here, you can create, edit, and view a reference evaluation. All evaluations of the supervisors continue to be displayed. Depending on the status of the calibration, you can view the evaluations.

Details
Assigned Session
Supervisors*
Evaluations

Reference Evaluation
+




The reference evaluation has not been executed.

| Evaluations | |
|--------------|----------|
| Created By ↕ | Result ↕ |
| Agent, 80. | |



Save
Reset

Fig. 51: Tab Evaluations (example)

Reference evaluation

| | | |
|---|---------------|--|
|  | <i>Create</i> | Open the evaluation template. Enter your reference evaluation. See chapter "Create reference evaluation", p. 49 |
|  | <i>Edit</i> | Opens the reference evaluation. You can edit the reference evaluation until you release it. See chapter "Edit reference evaluation", p. 50 |
|  | <i>View</i> | Here, you can view the reference evaluation. |


Evaluations


| | | |
|---|-------------------------|--|
|  | <i>View</i> | Here, you can view the evaluation. |
|  | <i>Print evaluation</i> | Here, you can print the evaluation. See chapter "Print evaluation", p. 36. |

In the column Result, you see the result of the evaluations.

4.3.4.1

Create reference evaluation

- Click on the icon  (*Create*).
⇒ The window *Evaluation* appears.
- Create the reference evaluation on the basis of the session.
- Click the button *Apply*.
⇒ The confirmation window appears. Decide whether you would like to release the evaluation or save it as a draft.


 Do you want to release the evaluation?

Yes
No

Fig. 52: Confirmation window for the reference evaluation

- Click on the button *Yes* to release the reference evaluation.
Click on the button *No* to save the reference evaluation as a draft.
- Click on the button *Save*.

4.3.4.2 Edit reference evaluation

- Click on the icon  (*Edit*).
⇒ The window *Evaluation* appears.
- Change the reference evaluation on the basis the session.
- Click the button *Apply*.
⇒ The confirmation window appears. Decide whether you would like to release the evaluation or continue to save it as a draft.

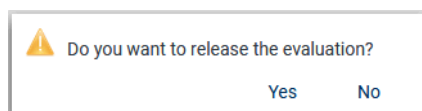

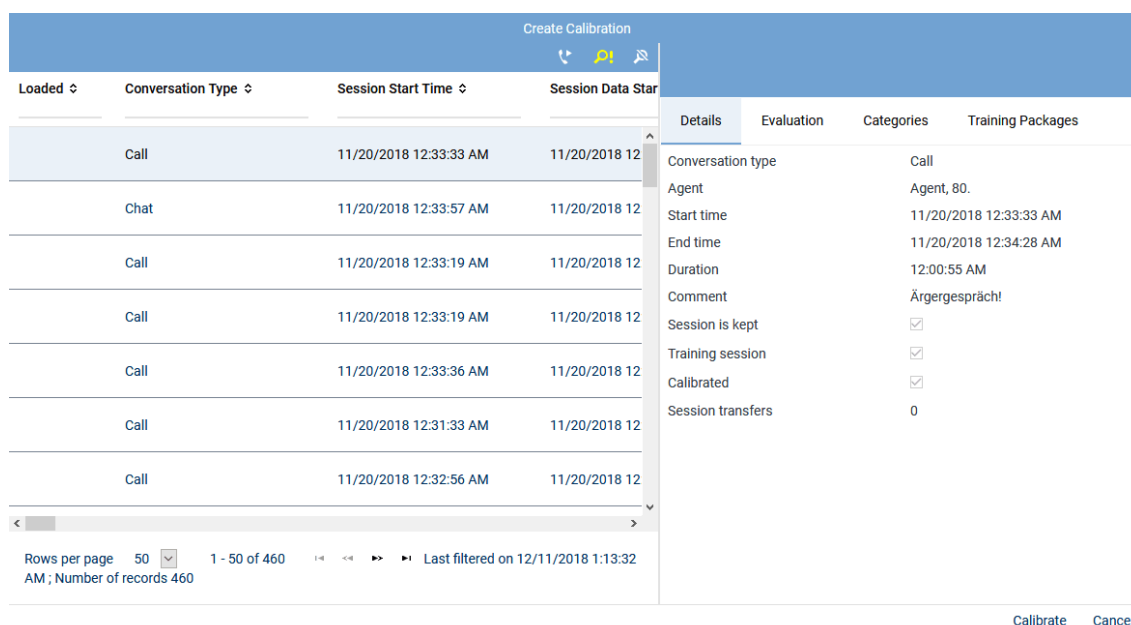


Fig. 53: Confirmation window for the reference evaluation

- Click on the button *Yes* to release the reference evaluation.
Click on the button *No* to save the reference evaluation as a draft.
- Click on the button *Save*.

4.4 Create calibration

- Click on the icon  (*Create*) in the toolbar of the main view.
⇒ The window *Create calibration* appears.




The "Create Calibration" window is shown. It has a blue header bar with the title "Create Calibration" and three icons: a refresh icon, a save icon, and a delete icon. Below the header is a table with four columns: "Loaded", "Conversation Type", "Session Start Time", and "Session Data Star". The table contains several rows of data. To the right of the table is a sidebar with four tabs: "Details", "Evaluation", "Categories", and "Training Packages". The "Details" tab is selected, showing various fields like "Conversation type", "Agent", "Start time", "End time", "Duration", "Comment", "Session is kept", "Training session", "Calibrated", and "Session transfers". At the bottom of the window, there are buttons for "Calibrate" and "Cancel".

| Loaded | Conversation Type | Session Start Time | Session Data Star |
|--------|-------------------|------------------------|-------------------|
| | Call | 11/20/2018 12:33:33 AM | 11/20/2018 12 |
| | Chat | 11/20/2018 12:33:57 AM | 11/20/2018 12 |
| | Call | 11/20/2018 12:33:19 AM | 11/20/2018 12 |
| | Call | 11/20/2018 12:33:19 AM | 11/20/2018 12 |
| | Call | 11/20/2018 12:33:36 AM | 11/20/2018 12 |
| | Call | 11/20/2018 12:31:33 AM | 11/20/2018 12 |
| | Call | 11/20/2018 12:32:56 AM | 11/20/2018 12 |


Rows per page: 50 (dropdown) | 1 - 50 of 460 | Last filtered on 12/11/2018 1:13:32 AM ; Number of records 460



Fig. 54: Create calibration (example)


- Select the session for which you would like to create a calibration.
In the 4 tabs, you can view all the information and actions for the selected call:
 - Details**
Lists all detailed information.
 - Evaluation**
Shows all evaluations made on the session.
 - Categories**
Shows all assigned categories.
 - Training Packages**
Shows all assigned training packages.
- To replay the session, click on the icon  (*Load*).

4. To create a calibration, click on the button *Calibrate*.
⇒ The main view of the Calibrations module appears.
5. In the detail view, make all necessary settings within the tabs.
You can change tabs without buffering without risking the loss of your settings.
 - *Details*, see [chapter "Tab Details"](#), p. 44
 - *Sessions*, see [chapter "Tab Assigned Session"](#), p. 46.
 - *Supervisors*, see [chapter "Tab Supervisors"](#), p. 48.
 - *Evaluations*, see [chapter "Tab Evaluations"](#), p. 48
6. To save the settings, click on the button *Save*.
To reset all settings or changes in all tabs, click on the button *Reset*.

4.5 Delete calibration

1. In the main view, select the calibration you would like to delete.
2. Click on the icon  (*Delete*).
⇒ A window which prompts you to confirm the deletion procedure appears.
3. Click on the button *Yes* in this window.

| Calibration Name ↕ | Template Name ↕ | Created By ↕ | Status ↕ | Stops Automatically ↕ | Start Date ↕ |
|--------------------|--------------------------|-------------------|---|-----------------------|--------------|
| Kalibrierung | Agentenbewertung Telefon | Admin, 1st-Tenant | * | ✓ | |
| Kalibrierung | Testbewertung | Agent, 80. |  | ✓ | 12/11/2018 |
| Kalibrierung | Feedback | Agent, 80. |  | ✓ | 12/11/2018 |
| Kalibrierung | Feedback | Admin, 1st-Tenant | * | ✓ | |

 Do you really want to delete the selected object?

Yes No

Fig. 55: Delete calibration

4.6 Start calibration

1. Select the respective calibration in the main view.
2. Click on the menu item *Calibrations > Start* in the toolbar of the main view.
⇒ The calibration is started.



Only calibrations with the status *Initiated* () can be started manually.

4.7 Stop calibration

1. Select an open calibration evaluation in the main view.
2. Click on the menu item *Calibrations > Stop* in the toolbar of the main view.
⇒ The calibration is stopped. No more evaluations can be made.

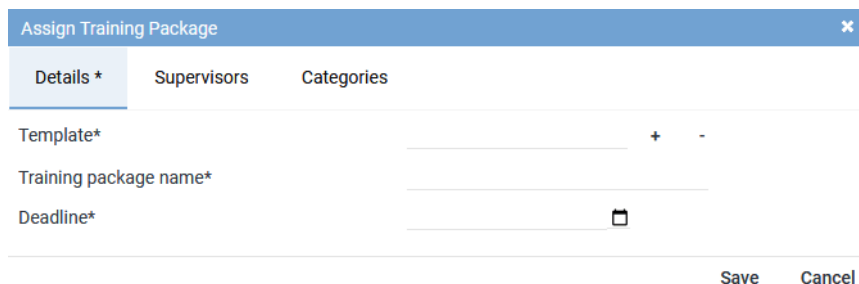
4.8 Assign/Create training package

1. To create or assign a new training package, click on the menu item *Calibrations > Assign/ Create Training Package* in the toolbar of the main view.
2. To assign a training package, select the option *Assign*. See [chapter "Assign Training Package"](#), p. 52.

- To create a training package, select the option *Create Training Package*. See [chapter "Create training package", p. 55](#).

4.8.1 Assign Training Package

- Click on the menu item *Calibrations > Assign/Create Training Package* in the toolbar of the main view.
- Select the option *Assign*.



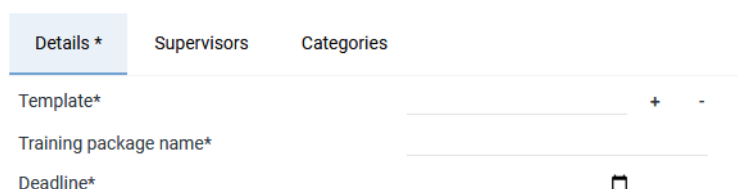
The dialog box titled "Assign Training Package" has a close button (X) in the top right corner. It contains three tabs: "Details *", "Supervisors", and "Categories". The "Details *" tab is active and shows three input fields: "Template*" with a "+" and "-" button, "Training package name*", and "Deadline*" with a calendar icon. At the bottom right are "Save" and "Cancel" buttons.

Fig. 56: Assign Training Package

The detail view consists of the following tabs:

- **Details**
Here, you can define the details of a training package. See [chapter "Tab Details", p. 52](#).
 - **Supervisors**
Here, you can add additional supervisors who are supposed to receive the training package, too. See [chapter "Tab Supervisors", p. 53](#).
 - **Categories**
Here, you can add categories to the training package. See [chapter "Tab Categories", p. 55](#).
- In the detail view, adjust all necessary settings within the 3 tabs.
You can change tabs without buffering without risking the loss of your settings.
 - To use the entries, click on the button *Save*.
 - To discard the entries and close the window, click on the button *Cancel*.




4.8.1.1 Tab Details



The "Tab Details" dialog box is identical to the one in Fig. 56, showing the "Details *" tab with fields for Template, Training package name, and Deadline, and Save/Cancel buttons.

Fig. 57: Tab Details

Complete the 3 mandatory fields:

| | |
|------------------------------|---|
| Template | The button  allows adding a template to the training package. See chapter "Add training package template", p. 20 . The button  allows deleting a template from the training package. |
| Training package name | Enter a name for the training package. |
| Deadline | Select a deadline for the completion of the training package via the icon  . |



The fields marked with " * " are mandatory fields. These fields have to be filled out.

4.8.1.2 Tab Supervisors

In addition to the supervisors who are involved in the calibration process, you can add additional supervisors who are supposed to receive the same training package.

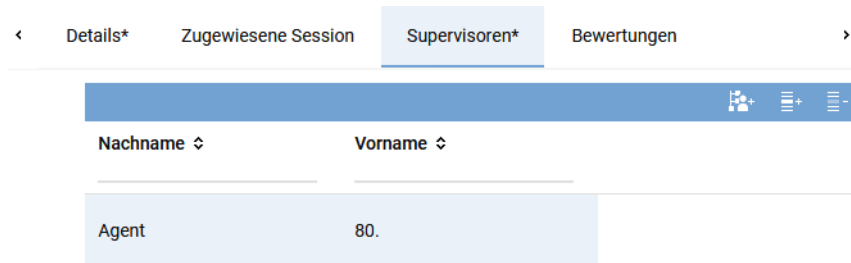






Fig. 58: Tab Supervisors (example)

| | | |
|---|--|---|
|  | <i>Add from organization structure</i> | Opens a window in which you can add more supervisors from the organization structure. See chapter "Add supervisors from the organization structure", p. 53. |
|  | <i>Add</i> | Here, you can add supervisors. See chapter "Add supervisors", p. 54. |
|  | <i>Delete</i> | Deletes the selected supervisor. |

4.8.1.2.1 Add supervisors from the organization structure

1. Select the tab *Supervisors* (see [chapter "Tab Supervisors", p. 48.](#)).
2. To assign a supervisor from the organization structure, click on the icon  (*Add from organization structure*).

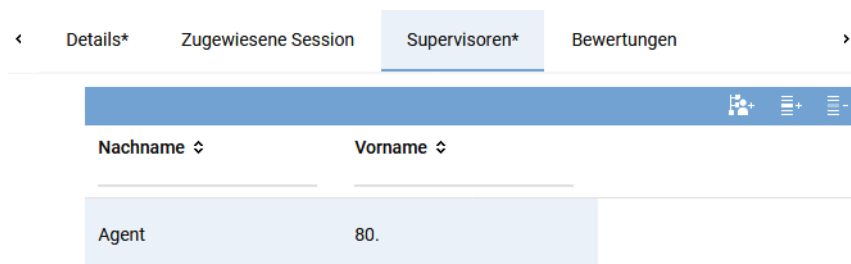




Fig. 59: Tab Supervisors (example)

3. Click on the respective name of the organization structure in the left window.
4. Select one or several supervisors from the list.
To select several supervisors or to revoke the selection, click on the respective line while holding the [Ctrl] key down.
To select all supervisors, click on the icon  (*Select all*).
To deselect all marked supervisors, click on the icon  (*Deselect all*).

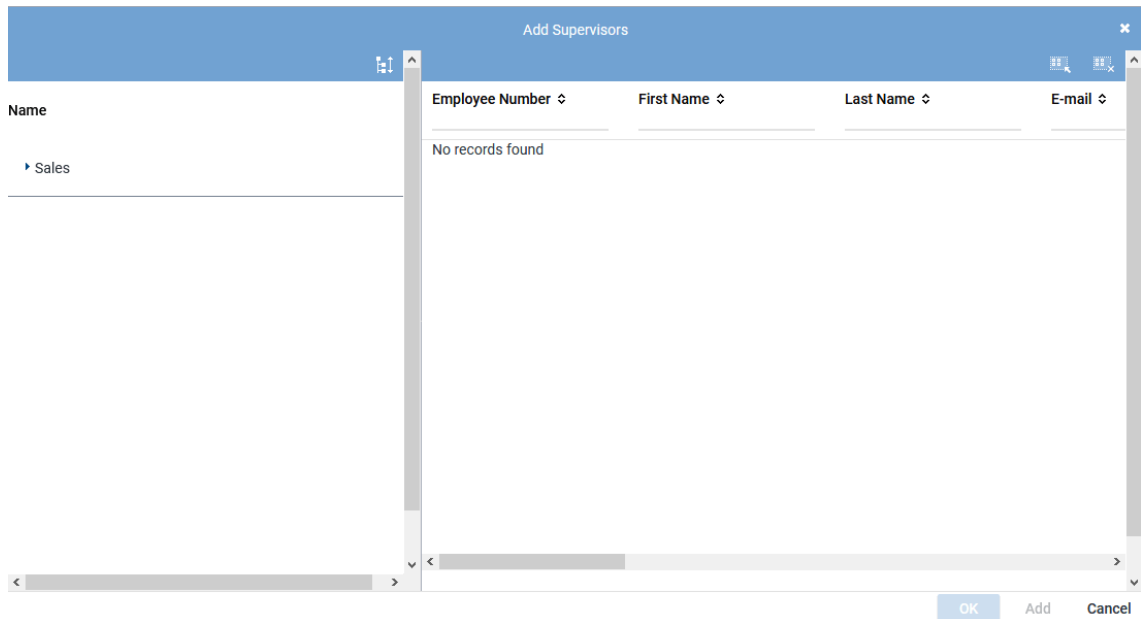



Fig. 60: Add supervisors from the organization structure

5. To add the selected supervisors and leave the window open for further adjustments, such as adding more supervisors from other organization structures, click on the button *Add*.
6. To add selected supervisors and close the window, click on the button *OK*.
To discard the selection and close the window, click on the button *Cancel*.

4.8.1.2.2 Add supervisors

1. Select the tab *Supervisors* (see [chapter "Tab Supervisors", p. 48](#)).
2. To assign a supervisors, click on the icon  (*Add*).

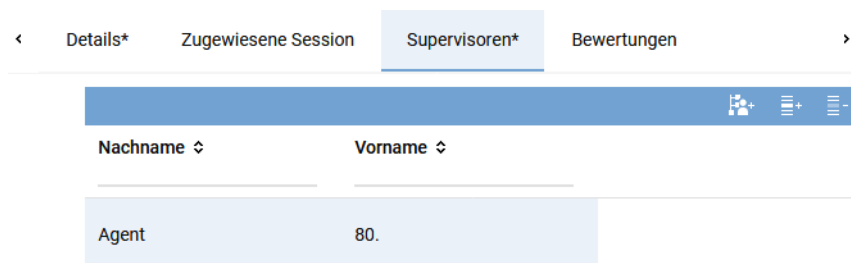
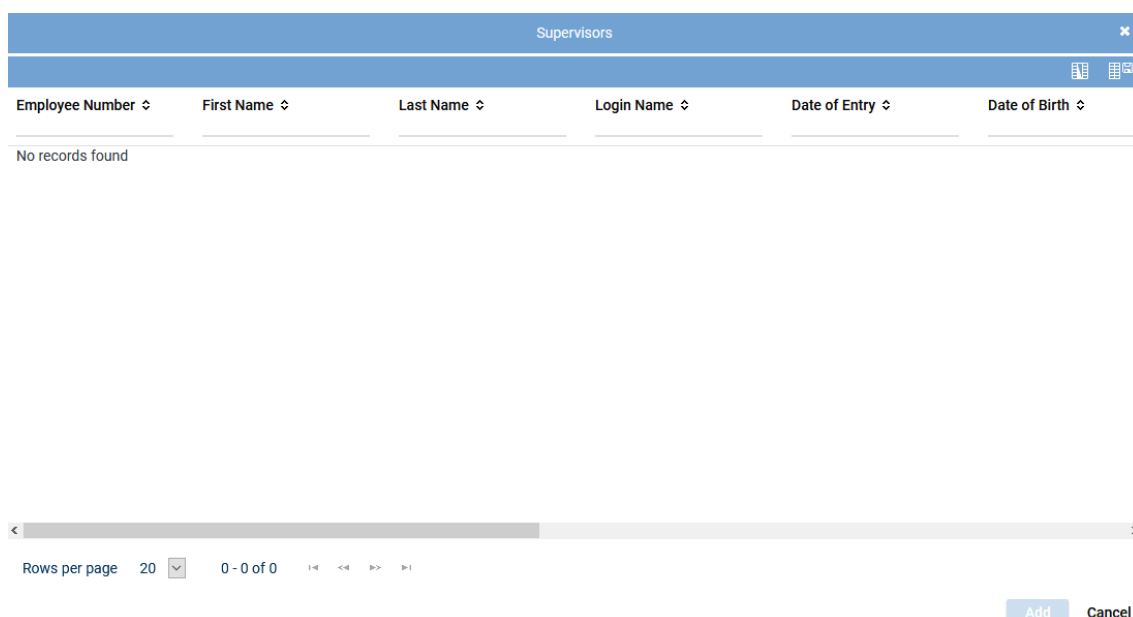


Fig. 61: Tab Supervisors

3. Select one or several supervisors from the list.
To select several supervisors or to revoke the selection, click on the respective line while holding the [Ctrl] key down.



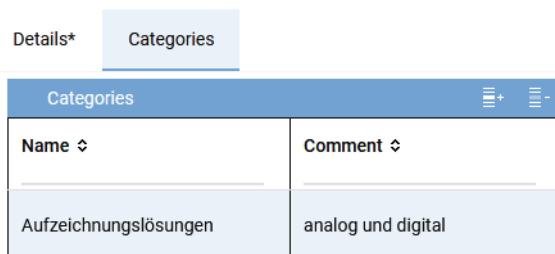
The image shows a window titled "Supervisors" with a close button (X) in the top right corner. Below the title bar is a toolbar with icons for list view, grid view, and a search icon. The main area contains a table with the following columns: Employee Number, First Name, Last Name, Login Name, Date of Entry, and Date of Birth. Each column has a dropdown arrow. Below the table, it says "No records found". At the bottom, there is a pagination bar showing "Rows per page 20" and "0 - 0 of 0". On the right side of the bottom bar, there are "Add" and "Cancel" buttons.

Fig. 62: Add supervisors from the organization structure

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

4.8.1.3 Tab Categories



Here, you can add or remove categories for the training package. If a category has already been selected in the training package template, it is added automatically for the training package.



The image shows a window with two tabs: "Details*" and "Categories". The "Categories" tab is active. It contains a table with two columns: "Name" and "Comment". The table has one row with the following data:

| Name | Comment |
|-----------------------|--------------------|
| Aufzeichnungslösungen | analog und digital |

Fig. 63: Tab Categories

| | | |
|---|---------------|---|
|  | Add | Opens a window in which you can select and add categories, see chapter "Assign category", p. 22 . |
|  | Remove | Removes the selected category from the list, see chapter "Remove category assignment", p. 22 . |



The categories for training packages and quizzes are created in the Templates module.

4.8.2 Create training package

1. Click on the menu item *Calibrations > Assign/Create Training Package* in the toolbar of the main view.
2. Select the option *Create Training Package*.
⇒ The template generator opens.
3. Set up the template according to your requirements.



For information about the template generator refer to the user manual *INSPIRATIONneo Template generator*.

4. 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*.
5. The following window appears:

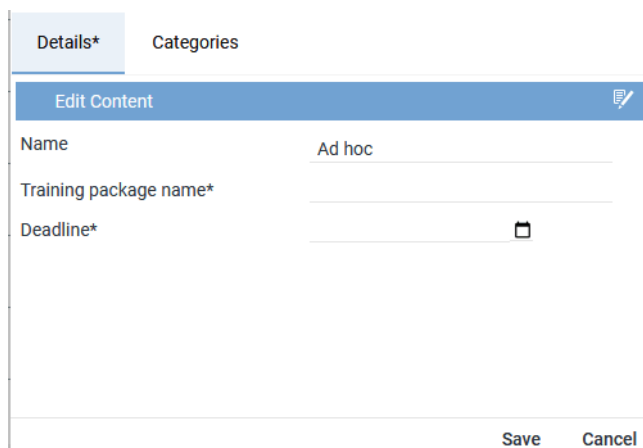


Fig. 64: Assign/Create ad hoc training package - detail view (example)

The detail view consists of the following tabs:

- **Details**
Here, you can define the details of a training package. See [chapter "Tab Details", p. 24](#).
 - **Agents** (only in the Training Packages module)
Here, you can assign agents to the training package. See [chapter "Tab Agents", p. 77](#).
 - **Supervisors** (only in the Calibrations module)
Here, you can assign additional supervisors to the training package. See [chapter "Tab Supervisors", p. 48](#).
 - **Categories**
Here, you can add categories to the training package. See [chapter "Tab Categories", p. 55](#)
6. In the detail view, make all necessary settings within the tabs.
You can change tabs without buffering without risking the loss of your settings.
 7. To assign the training package 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*.

4.9 Create new version of a template

1. In the main view, select the calibration from which you would like to create a new version of the underlying evaluation template.
 2. Click on the menu item *Calibrations > Create New Version of the Template* in the toolbar of the main view.
- ⇒ The template generator opens.
3. Set up the template according to your requirements.



For information about the template generator refer to the user manual *INSPIRATIONneo Template generator*.

4. 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*.
5. Adjust all necessary settings within the tabs.
You can change tabs without buffering without risking the loss of your settings.
 - *Details*, see [chapter "Tab Details"](#), p. 57
 - *Logical dependencies*, see [chapter "Tab Logical Dependencies"](#), p. 58
6. To save the settings, click on the button *Save*.
To cancel the creation process, click on the button *Cancel*.



You can only edit an evaluation as long as it has the status *Draft*.

4.9.1

Tab Details

Here, you can display and edit detailed information about the selected template.

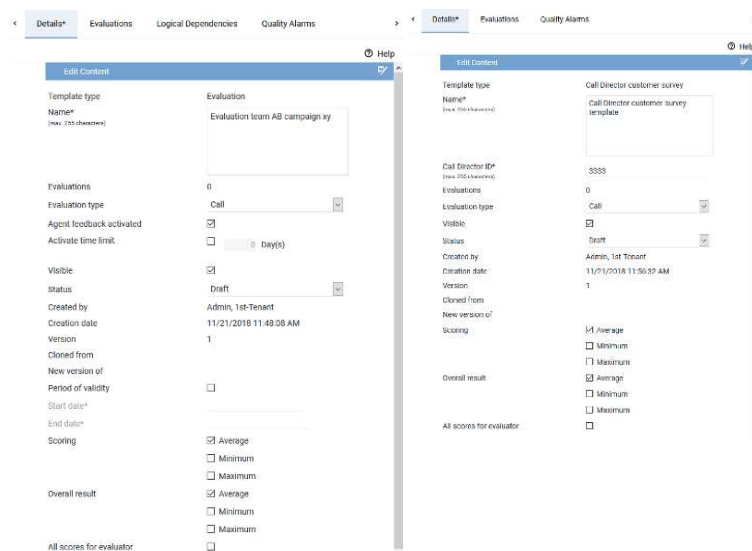


Fig. 65: Details (example)

| | |
|---------------------------------|--|
| Template type | Shows the type of the template. |
| Name | Name of the template. Enter the name of the template here. |
| Evaluation type | Shows to which evaluation type the template can be applied. Select for which evaluation type the template is supposed to be valid. The following evaluation types can be selected: <ul style="list-style-type: none"> • <i>Call</i> (only phone call or video call) • <i>Work item</i> (only screen activity) • <i>Chat</i> • <i>Conversation</i> (phone call including screen activity) |
| Agent feedback activated | Shows whether the template has been released for agent feedback. |

| | |
|----------------------------|--|
| | <p>If a template has been activated for agent feedback, then every evaluation on the basis of this template has to be confirmed by the agent who is being evaluated.</p> <p>Select whether the agent feedback is supposed to be activated.</p> <p><input checked="" type="checkbox"/> = Agent feedback has been activated.</p> <p><input type="checkbox"/> = Agent feedback has been deactivated.</p> |
| <i>Activate time limit</i> | Select the time limit in days within which the agents have to submit their feedback. Once the time limit has been exceeded, the evaluation is deemed to have been accepted. |
| <i>Visible</i> | <p>Shows whether the template is visible for other users.</p> <p>Select whether the template is supposed to be visible.</p> <p><input checked="" type="checkbox"/> = Template is visible.</p> <p><input type="checkbox"/> = Template is invisible.</p> |
| <i>Status</i> | <p>Shows the editing status of the template.</p> <p>Select the status of the template. Possible options:</p> <ul style="list-style-type: none"> • <i>Draft</i> • <i>Released</i> There can only be 1 released version of a template. • <i>Deactivated</i> (only possible for templates which have already been released) A deactivated template cannot be activated again. To be able to access the contents of a deactivated template, you have to create a new version of the template. |
| <i>Created by</i> | Name of the user who has created the template. |
| <i>Creation date</i> | Shows the date on which the template was created. |
| <i>Version</i> | Version number of the template. |
| <i>Cloned from</i> | Name of the template from which this template has been cloned (<i>Create > Create Clone</i>). |
| <i>New version of</i> | Name of the template which has been the basis for this version (<i>Create > Create New Version</i>). |
| <i>Period of validity</i> | <p>Shows the period during which the template can be used by other users.</p> <p>Select whether the template is supposed to be available for a restricted time period.</p> <p><input checked="" type="checkbox"/> = Availability of template is restricted to a certain time period.</p> <p><input type="checkbox"/> = Availability of template is not restricted to a certain time period.</p> |



The fields marked with " * " are mandatory fields. These fields have to be filled out.

4.9.2 Tab Logical Dependencies

Here, you can display and edit the dependencies between individual elements of the template. Depending on a selected answer to a question, you can define a following answer of a different question. The following answer is then fixed and cannot be changed during the evaluation.

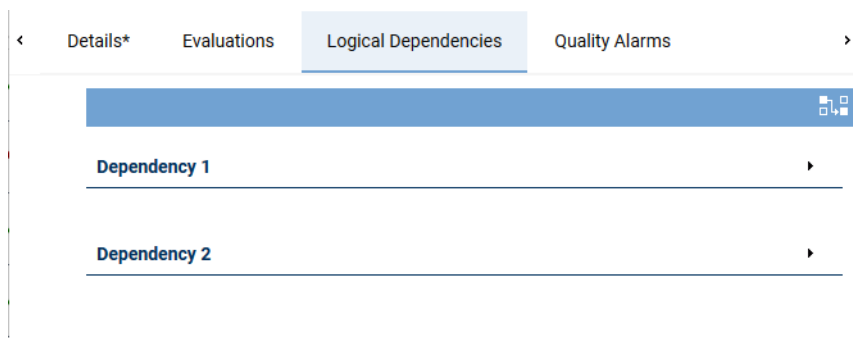



Fig. 66: Logical Dependencies

1. To show information of a logical dependency, click on the icon  next to the name of the logical dependency.

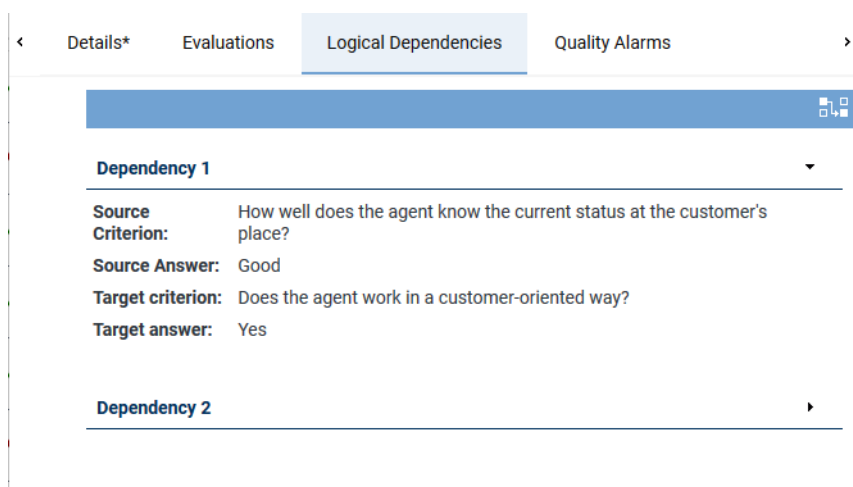




Fig. 67: Logical dependencies, information

2. To hide information of a logical dependency, click on the icon  next to the name of the logical dependency.
3. To define new dependencies or edit existing ones (see [chapter "Edit or create logical dependencies", p. 59](#)), click on the icon  (*Edit*).

4.9.2.1 Edit or create logical dependencies



You cannot define or change logical dependencies for templates which have already been used as the basis of evaluations.




If you finish editing the logical dependencies by clicking on *Cancel*, all dependencies which have been saved but not applied will be lost.



Logical dependencies cannot be defined across sections.



Every element can be used as a criterion only once. It is not possible to use it several times.

1. Select the tab *Logical Dependencies*, see [chapter "Tab Logical Dependencies", p. 58](#).
2. To define new dependencies or edit existing ones, click on the icon  (*Edit logical dependencies*).
3. In the working area, click on the element the answer of which is supposed to serve as basic criterion.

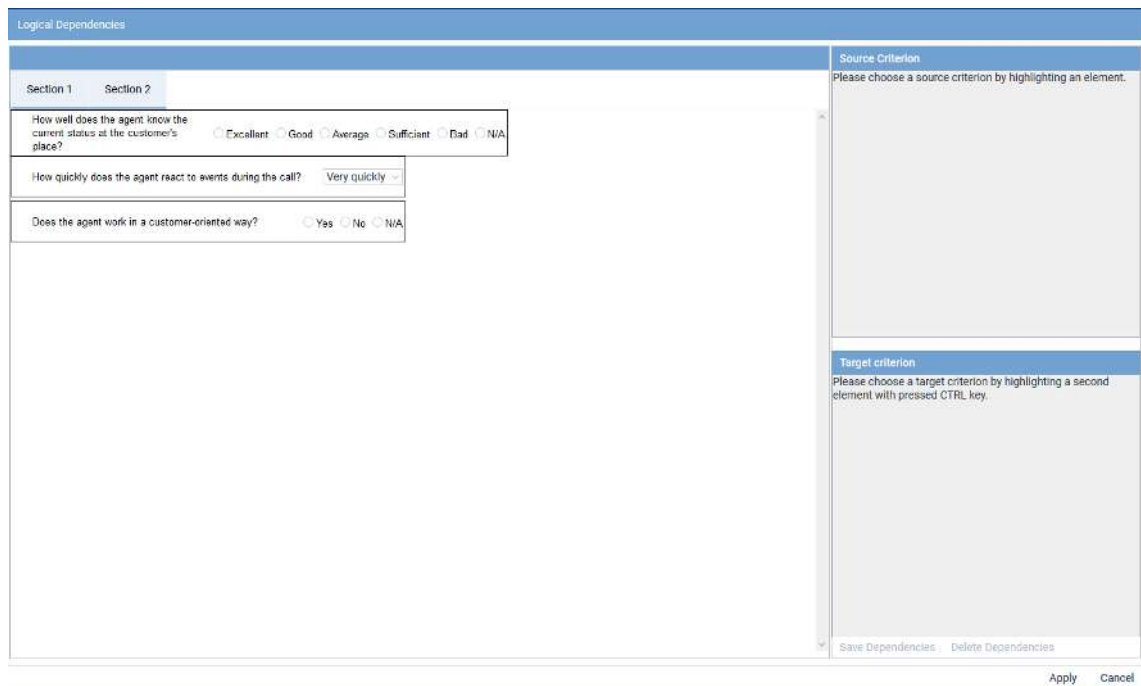


Fig. 68: Define logical dependencies

4. Select the value for the source answer in the window *Source Criterion*.

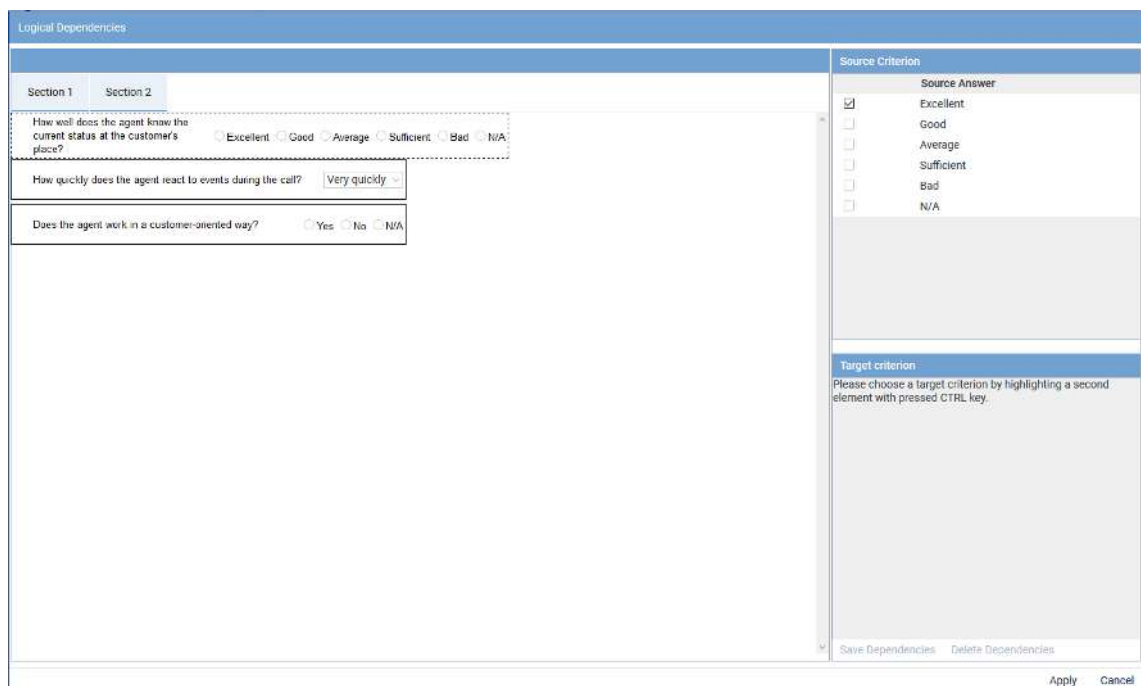


Fig. 69: Logical dependencies - define source criterion

5. Click on the element the answer of which is to serve as target criterion while holding the [Ctrl] key down.

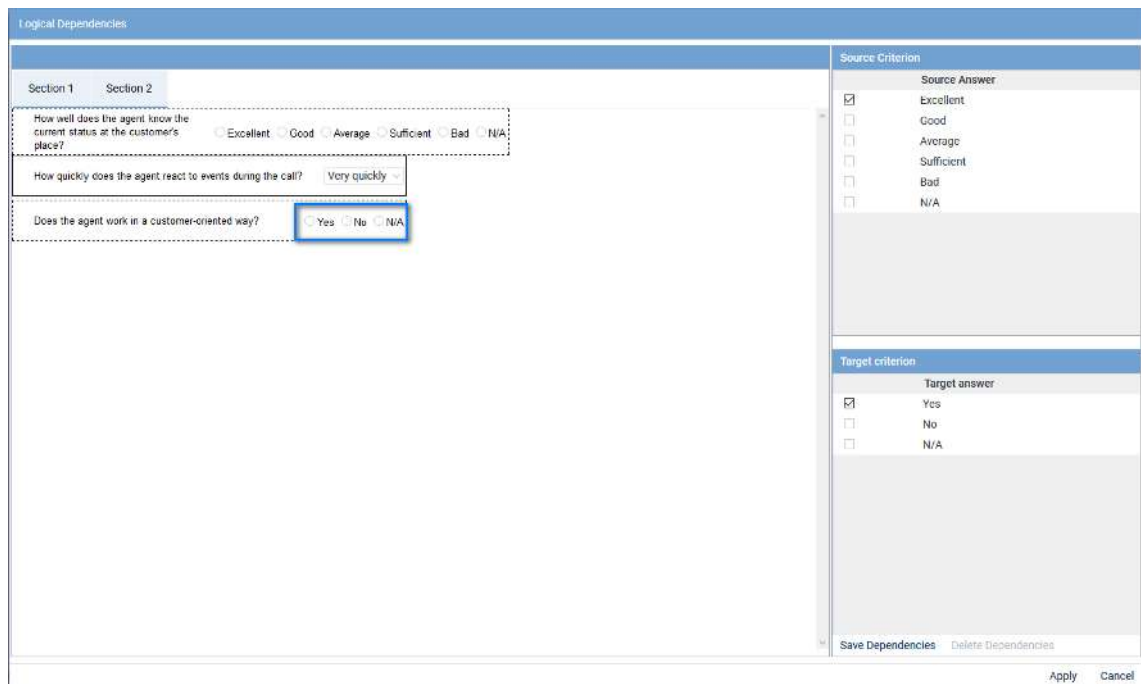


Fig. 70: Logical dependencies - define target criterion

6. Select the value for the target answer in the window *Target Criterion*.
 7. To save the defined dependency, click on the button *Save Dependencies*.
 8. If required, repeat these steps for additional dependencies in the same or in different sections.
To change the section, click on the name of the section above the template area.
 9. To apply all defined dependencies for the template, click on the button *Apply*.
To close the window without applying the defined dependencies, click on the button *Cancel*.
- ⇒ In the displayed example, question 2 would be automatically set to “Yes”, if question 1 was answered with “Excellent”.

4.10 Replay of a session

1. Click on the menu item *Training Packages > Load or Coaching Advisor > Load* in the toolbar.
2. Select one of the following options:

| | |
|-------------------|--|
| Load All | <p>The entire recorded session is loaded into the Replay module.</p> <p>If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module.</p> <p>If a text message has been saved, then the SMS or SDS recording is displayed in a separate window of the Replay module.</p> <p>If a chat recording has been saved, then the chat text is displayed in the Message Viewer of the Replay module.</p> <p>If a camera recording has been saved, then the camera video is displayed in the Video Viewer of the Replay module.</p> |
| Load Audio | <p>The voice recording of the session is loaded into the Replay module.</p> <p>This option is only active if a voice recording has been saved for the selected session.</p> |

| | |
|------------------------------|---|
| <i>Load Screen Recording</i> | <p>The screen recording of the session is loaded into the Video Viewer of the Replay module.</p> <p>This option is only active if a screen recording has been saved for the selected session.</p> |
| <i>Load SMS/SDS Text</i> | <p>The SMS or SDS recording of the session is loaded into a separate window of the Replay module.</p> <p>This option is only active if an SMS or SDS recording has been saved for the selected session.</p> |
| <i>Load Chat Text</i> | <p>The chat recording of the session is loaded into the Message Viewer of the Replay module.</p> <p>This option is only active if a chat recording has been saved for the selected session.</p> |
| <i>Load Video</i> | <p>The camera recording of the session is loaded into the Video Viewer of the Replay module.</p> <p>This option is only active if a camera recording has been saved for the selected session.</p> |

3. The session is loaded into the Replay module and can be replayed there.
For information about the functions of the Replay module see [chapter "Replay module"](#), p. 98.

5 Quality Alarms module

5.1 General

The Quality Alarms module is used to create quality alarms to inform configured users if agents do not reach previously defined criteria. The intent is that sessions which neither meet the expected agent performance nor the desired quality standard are pointed out automatically, so that they can be analyzed and the agent can be assigned an additional training where necessary. Quality alarms ensure that weaknesses of agents are revealed immediately and can be removed in a target-oriented way.

The following quality alarms are available:

- Quality alarm for evaluations

An evaluation alarm is created to notify the supervisor when an agent does not reach a defined threshold value in an evaluation. Since an evaluation is usually used to determine the skills of an agent, the quality alarm ensures that an agent can be fostered individually and in a timely manner.

- Quality alarm for quizzes

To find out whether trainings have had the desired effect or whether the agent's knowledge is still up to date, a quiz can be assigned. If a defined threshold value is not reached in a quiz, a notification is issued and the concerned agent can be trained correspondingly.

- Quality alarm for keywords

This quality alarm checks in cyclic intervals whether the sessions (conversations) of agents do or do not contain a certain number of keywords. If the keywords are found or not found, depending on the configuration, an alarm is issued and the concerned agent can be trained correspondingly.

- Quality alarm for real-time keyword spotting

This quality alarm checks in real time whether the sessions (conversations) of agents contain a certain number of certain keywords. If the keywords are found or not found, depending on the configuration, an alarm is issued and the concerned agent can be trained correspondingly.

NOTICE! The options *Quality Alarm for Keywords* and *Quality Alarm for Real-Time Keyword Spotting* can only be configured if at least one Keyword Spotting Analysis license is available in the system.

NOTICE! To carry out real-time keyword spotting `QUALITY_ALARM_KEYWORD_REALTIME` must have been activated in the Notifications module. For more information refer to the administration manual for tenants *Notifications module*.


In this module, you can define and activate these quality alarms.



Only those employees are displayed as *supervisors* who have been assigned the role *Supervisor* by the administrator.

5.2 Main view








In the main view, all saved quality alarms are displayed.

| Type | Name | Created By | Creation Date | Activated | Global |
|---|-------------|-------------------|-----------------------|-----------|--------|
|  | Internal QA | Admin, 1st-Tenant | 11/21/2018 3:39:07 AM | ✗ | ✗ |

Rows per page: 50 | 1 - 1 of 1 | < > << >>

Fig. 71: Main view - quality alarms

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

| | |
|--------------------------------------|--|
| Type | Type of the quality alarm  = global quality alarm for evaluation template  = specific quality alarm for evaluation template  = global quality alarm for a quiz template  = specific quality alarm for a quiz template  = quality alarm for keywords |
| Name | Name of the template |
| Created By | Name of the user who has created the quality alarm. |
| Creation Date | Shows the date on which the template was created. |
| Activated | Shows whether the quality alarm has been activated.  = Quality alarm has been activated.  = Quality alarm has been deactivated. |
| Global | Shows whether a global quality alarm has been released for all or only for selected evaluation templates.  = Global quality alarm has been released for all evaluation templates.  = Global quality alarm has been released for selected evaluation templates only. |
| Minimum Number of Evaluations | Shows how many evaluations have to be made at least before the quality alarm is analyzed. |
| Per Agent | Shows whether the minimum number of evaluations is supposed to be used for the individual agents.  = The minimum number of evaluations is used for the individual agents.  = The minimum number of evaluations is used for all selected agents. |
| All Agents | Shows whether the quality alarm is valid for all agents.  = valid for all agents  = not valid for all agents |



| | |
|------------------------|---|
| <i>Monitored Score</i> | Shows the monitored score. |
| <i>Rating Scheme</i> | Shows the selected rating scheme. |
| <i>Updated</i> | Shows the point in time when the quality alarm was updated for the last time. |

5.2.1 Toolbar of the main view

The toolbar offers the following functions.



Fig. 72: Toolbar Quality Alarms module



| | | |
|---|---------------------------------|--|
|  | <i>Create</i> | Here, you can create a quality alarm. See chapter "Create quality alarm", p. 81 . There are 3 options: <ul style="list-style-type: none"> • <i>Quality Alarm for Evaluations</i> • <i>Quality Alarm for Quizzes</i> • <i>Quality Alarm for Keywords</i> |
|  | <i>Delete</i> | Deletes the selected quality alarm. To permanently delete the quality alarm, confirm the security prompt with Yes . |
| <i>General</i> | <i>Print</i> | Prints the table of the main view. |
| | <i>Adjust Table</i> | Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page |
| | <i>Save Table Configuration</i> | Saves the current table configuration of the main view as default view of the user. |
| | <i>Search</i> | Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see chapter "Search", p. 12 . |
| | <i>Reset Search</i> | Resets all manually entered search criteria. The search is started without manual filter settings. |
| | <i>General Help</i> | By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened. |
| | <i>Module Help</i> | By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened. |






In the user manual *INSPIRATIONneo - General information*, you find detailed descriptions of the default functions such as *Print*, *Adjust table* or *Help* if required.



5.2.2 Icons of the quality alarm table

Column: Type



| | | |
|---|--|---|
|  | <i>Quality alarm for an evaluation template</i> | Shows that this is a quality alarm for an evaluation template. |
|  | <i>Specific quality alarm for an evaluation template</i> | Shows that this is a specific quality alarm for an evaluation template. |

| | | |
|---|---|--|
|  | <i>Quality alarm for a quiz template</i> | Shows that this is a quality alarm for a quiz template. |
|  | <i>Specific quality alarm for a quiz template</i> | Shows that this is a specific quality alarm for a quiz template. |
|  | <i>Quality alarm for keywords</i> | Shows that this is a quality alarm for keywords. |



Column: Activated

| | | |
|---|-----------------|--|
|  | <i>Active</i> | Shows that the quality alarm is active. |
|  | <i>Inactive</i> | Shows that the quality alarm has been deactivated. |



Column: Global

| | | |
|---|-----------------|---|
|  | <i>Active</i> | Shows that the quality alarm has been activated for all evaluation templates. |
|  | <i>Inactive</i> | Shows that the quality alarm has been activated for selected evaluation templates only. |

Column: Per Agent

| | | |
|--|--|---|
|  | | Shows that the minimum number of evaluations is used for the individual agents. |
|  | | Shows that the minimum number of evaluations is used for all selected agents. |

Column: All Agents


| | | |
|---|--|---|
|  | | Shows that the quality alarm is valid for all agents. |
|  | | Shows that the quality alarm is not valid for all agents. |

5.3**Detail view**

Here, you can display and edit detailed information about the selected template.

Internal QA

< Details*
Time Settings
Notifications*
Evaluation Templates* >

 Help

Activated

☐

Name*

Internal QA

Minimum number of evaluations*

3

☐ Per agent

Enable for

☐ All agents

Rating scheme*

Default (0%-100%)

Monitored score*

0

Sektion 2*

0

Sektion 1*

0

Save

Reset

Fig. 73: Detail view - Quality Alarms module (example)


The detail view consists of the following tabs:

- *Details*, see [chapter "Tab Details"](#), p. 67.
- *Time Settings*, see [chapter "Tab Time Settings"](#), p. 71. Only visible for evaluation templates and for quiz templates.
- *Notifications*, see [chapter "Tab Notifications"](#), p. 72.
- *Evaluation Templates*, see [chapter "Tab Evaluation Templates"](#), p. 75. Only visible for evaluation templates.
- *Quiz Templates*, see [chapter "Tab Quiz Templates"](#), p. 76. Only visible for quiz templates.
- *Agents*, see [chapter "Tab Agents"](#), p. 77.
- *Keywords*, see [chapter "Tab Keywords"](#), p. 80. Only visible for keywords.

5.3.1 Tab Details

Here, you can define the basic settings of the quality alarm.

< **Details*** Time Settings Notifications* Evaluation Templates* >

 Help

Activated ☐

Name*

Minimum number of evaluations*

☐ Per agent

Enable for ☐ All agents



Rating scheme*



Monitored score*

Sektion 2*

Sektion 1*

Fig. 74: Tab Details (example)

| | |
|--------------------------------------|--|
| Activated | <p>Shows whether the quality alarm has been activated.</p> <p>Select whether the quality alarm is supposed to be activated.</p> <p><input checked="" type="checkbox"/> = Quality alarm has been activated.</p> <p><input type="checkbox"/> = Quality alarm has been deactivated.</p> |
| Name | <p>Name of the quality alarm. Enter the name of the quality alarm here.</p> |
| Minimum number of evaluations | <p>Shows how many evaluations have to be made at least before the quality alarm is analyzed.</p> <p>Enter the number of the necessary evaluations.</p> <p>Only visible for <i>Quality alarm for evaluations</i>.</p> |
| Per agent | <p>Shows whether the minimum number of evaluations is supposed to be used for the individual agents.</p> <p>Select the way the quality alarm is supposed to be used.</p> <p><input checked="" type="checkbox"/> = Apply to individual agents.</p> <p><input type="checkbox"/> = Apply to all selected agents.</p> <p>Only visible for <i>Quality alarm for evaluations</i>.</p> |
| Enable for | <p>Here, you can define whether the quality alarm is supposed to be applied to all agents or templates known to the system. If the option <i>All agents</i> is selected, you get a message and all agents are deleted that were selected in the tab <i>Agents</i>. The same applies for the option <i>All templates</i> in connection with the tab <i>Evaluation Templates</i>.</p> <p>Select the way the quality alarm is supposed to be used.</p> <p><input checked="" type="checkbox"/> = Apply to all entries.</p> <p><input type="checkbox"/> = Apply to the assigned entries only.</p> |
| Rating scheme | <p>Shows which rating scheme is used.</p> <p>The button  allows adding a rating scheme. See chapter "Add rating scheme", p. 69.</p> <p>The button  removes the rating scheme from the quality alarm.</p> <p>The displayed value cannot be changed for specific quality alarms.</p> |

| | |
|---------------------------|---|
| | Only visible for <i>Quality alarm for evaluations</i> and <i>Quality alarm for quizzes</i> . |
| <i>Monitored score</i> | Shows the total score which is monitored as threshold value. Enter a score for the threshold value. Threshold values can be defined for individual sections. Only visible for <i>Quality alarm for evaluations</i> and <i>Quality alarm for quizzes</i> . |
| <i>Audio analysis job</i> | Shows which audio analysis job is used. The button  allows adding an audio analysis job. See chapter "Add audio analysis job", p. 70 . The button  removes the audio analysis job from the quality alarm. Only visible for <i>Quality alarm for keywords</i> . |



It is not possible to create a quality alarm for different evaluation schemes. You can only select one evaluation scheme at once. You can only add templates to the quality alarm which have the same scheme assigned as the one selected for the alarm.




If more than 1 quiz or evaluation template is assigned to the quality alarm, it is not possible anymore to define threshold values for particular sections.

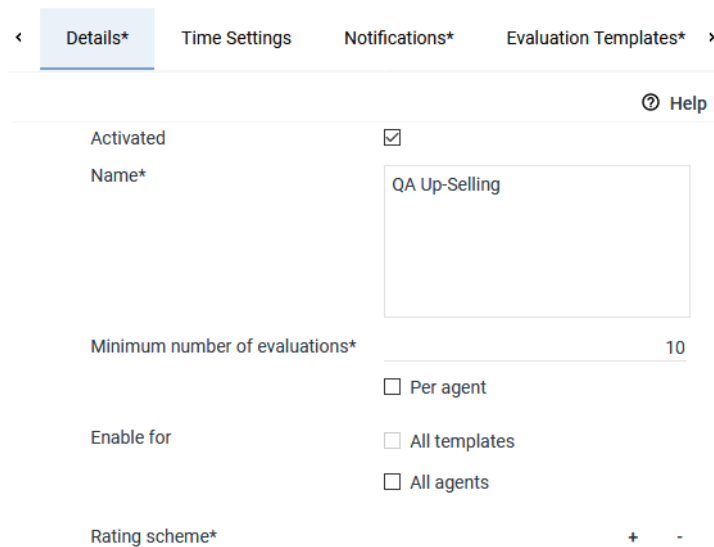


The fields marked with " * " are mandatory fields. These fields have to be filled out.

5.3.1.1

Add rating scheme

1. Click on the button  on the right of the field *Rating scheme*.



< **Details*** Time Settings Notifications* Evaluation Templates* >

Help

Activated ☒

Name*

Minimum number of evaluations*

Enable for ☐ Per agent ☐ All templates ☐ All agents

Rating scheme* + -

Fig. 75: Add rating scheme

2. Select a rating scheme from the list.

Rating Scheme

| Name | Description | Default |
|----------------------|---|---------|
| A-F Bewertungsschema | Verwendet die Noten A-F. Besonderheit: Nach D folgt F. Die Note E wird nicht verwendet. | ✗ |
| Default (0%-100%) | Verwendet Prozentwerte (0%-100%). | ✓ |
| 1-5 Bewertungsschema | Verwendet die Noten 1-5 | ✗ |

Rows per page 20

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Add

Cancel

Fig. 76: Select rating scheme (example)

- Click on the button *Add*.

5.3.1.2 Add audio analysis job

- Click on the button *+* on the right of the field *Audio analysis job*.

Details*

Notifications*

Agents*

Keywords

Activated

☐

Name*

Enable for

☐ All agents

Audio analysis job*

+

-

Help

Fig. 77: Add audio analysis job

- Select an audio analysis job from the list.

| Audio Analysis Jobs | | | | | |
|---------------------|----------------------|-----------------|---------------------|----------------------|--------|
| Name ↕ | Analysis Direction ↕ | Analysis Type ↕ | Analyzed Sessions ↕ | Sessions with Hits ↕ | Hits ↕ |
| KWS_Periodisch | → | 📋 | 2285 | 274 | 20574 |
| KWS_Einmalig | ← | 📋 | 10082 | 10082 | 90680 |

Rows per page 20 1 - 2 of 2

Add Cancel

Fig. 78: Select audio analysis job (example)

3. Click on the button *Add*.

5.3.2 Tab Time Settings

In this tab, you can define a point in time or a time interval for the execution of the quality alarms.

Quality Alarm

Details*

Time Settings

Notifications*

Agents*

Start

☒ Immediately

☐ 11/22/2011 08:12:31

End

☒ Never

☐ 11/22/2011 08:12:31

Repeat

☒ Daily

☐ Weekly

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

☐ Monthly

☐ First Monday

OK Cancel

Fig. 79: Specific quality alarms - time settings

| | |
|--------------|--|
| Start | Shows the time when the check starts. Define the point in time when the regular check is supposed to start. |
| End | Shows the time when the check ends. |

| | |
|---------------|---|
| | Define the point in time when the regular check is supposed to end. |
| <i>Repeat</i> | Shows the intervals of the check. |
| | Select the intervals in which the check is supposed to take place. |

5.3.3 Tab Notifications

Here, you can define who is supposed to be informed in which way if a quality alarm is triggered. You can notify agents, supervisors, users or the creator of the quality alarm.

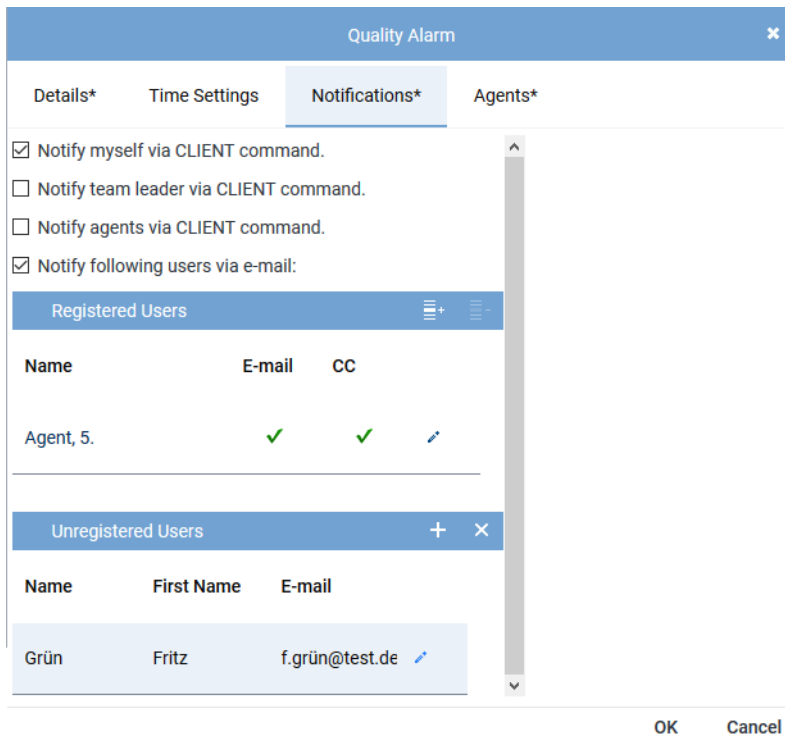


Fig. 80: Specific quality alarm - notifications

- To notify the creator, supervisors or agents directly via CLIENT command, set a check mark in the respective check box ☒.
- To notify certain users, set the check mark in the check box *Notify following users via e-mail*.
 - ⇒ Additional fields are displayed which allow assigning users and configuring the notification type. See [chapter "Assign registered users", p. 72](#) and [chapter "Assign unregistered users", p. 74](#).
In the column *E-mail*, the check mark shows whether the user is notified via e-mail or via CLIENT command:
 ✓ = notification option activated
 ✗ = notification option not activated

5.3.3.1 Assign registered users

- To assign a registered user, click on the icon  (Add).

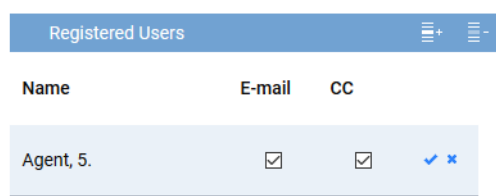



Fig. 81: Specific quality alarm - registered users (example)

- To select a user from the list, click on the line with the corresponding information. You can select several users by clicking on several lines.
To revoke a selection, click on the respective line while holding the [Ctrl] key down.

| Agents To Notify | | | | | |
|-----------------------------|------------|-----------|------------|---------------|---------------|
| Employee Number | First Name | Last Name | Login Name | Date of Entry | Date of Birth |
| 1000 | 10. | Agent | | | |
| 900 | 9. | Agent | | | |
| 800 | 8. | Agent | | | |
| 700 | 7. | Agent | | | |
| 600 | 6. | Agent | | | |
| 400 | 4. | Agent | | | |
| 300 | 3. | Agent | | | |
| Rows per page 20 1 - 9 of 9 | | | | | |
| | | | | | Add Cancel |

Fig. 82: Specific quality alarm - select registered users (example)

- To add selected users, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.
- To define whether the user is supposed to be notified via e-mail or via CLIENTcommand, click on the icon  (*Edit*). One of the two options has to be activated.



| Registered Users | | |
|------------------|-------------------------------------|-------------------------------------|
| Name | E-mail | CC |
| Agent, 5. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Fig. 83: Specific quality alarm - edit registered users (example)


- Select the notification type in the column *E-mail* or *CC* (CLIENTcommand):
☒ = Notification has been activated.
☐ = Notification has not been activated.

| Name | E-mail | CC |
|-----------|-------------------------------------|-------------------------------------|
| Agent, 5. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Fig. 84: Specific quality alarm - configure type of notification (example)

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


5.3.3.2 Remove registered users

- To remove a registered user from the list, select the corresponding entry in the list and click on the icon  (*Remove*).

| Registered Users | | |
|------------------|--------|----|
| Name | E-mail | CC |
| Agent, 5. | ✓ | ✓ |

Fig. 85: Specific quality alarm - remove registered user (example)

5.3.3.3 Assign unregistered users

1. To assign an unregistered user, click on the icon  (Add).
2. Enter the name and the e-mail address of the user.

Add Unregistered User

First name*

Last name*

E-mail*


Save

Cancel

Fig. 86: Specific quality alarm - add unregistered users

3. To save the settings, click on the button **Save**.
To discard the settings and close the window, click on the button **Cancel**.

5.3.3.4 Edit unregistered users

1. To edit the information of an unregistered user, select the corresponding entry in the list and click on the icon  (Edit).



| Unregistered Users | | |
|--------------------|------------|----------------|
| Name | First Name | E-mail |
| Grün | Fritz | f.grün@test.de |

Fig. 87: Specific quality alarm - unregistered users (example)


2. Make the required changes.

| Unregistered Users | | |
|--------------------|------------|----------------|
| Name | First Name | E-mail |
| Grün | Fritz | f.grün@test.de |

Fig. 88: Specific quality alarm - edit unregistered users (example)

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

5.3.3.5 Delete unregistered users

- To delete an unregistered user from the list, select the corresponding entry in the list and click on the icon  (*Delete*).


| Unregistered Users | | |
|--------------------|------------|--|
| Name | First Name | E-mail |
| Grün | Fritz | f.grün@test.de  |

Fig. 89: Specific quality alarm - delete unregistered users (example)

5.3.4 Tab Evaluation Templates



Here, you can add the evaluation templates.



Evaluation templates can only be added if a rating scheme has been selected in the tab *Details*.

| < | Details* | Time Settings | Notifications* | Evaluation Templates* | > |
|--------------------------------------|----------|-------------------|----------------|-----------------------|---|
| <div> <div></div> <div></div> </div> | | | | | |
| Name ↕ | | Created By ↕ | | | |
| Weiteres Feedback | | Admin, 1st-Tenant | | | |

Fig. 90: Tab Evaluation Templates

| | | |
|---|---------------|---|
|  | <i>Add</i> | Opens a window in which you can select and add evaluation templates. See chapter "Add evaluation template", p. 75 |
|  | <i>Remove</i> | Deletes the selected evaluation template. |



You can only add evaluation templates with the status *Released* and *Draft*. Templates with the status *Deactivated* cannot be used.

5.3.4.1 Add evaluation template

- To add an evaluation template, click on the icon  (*Add*).

| < | Details* | Time Settings | Notifications* | Evaluation Templates* | > |
|--------------------------------------|----------|-------------------|----------------|-----------------------|---|
| <div> <div></div> <div></div> </div> | | | | | |
| Name ↕ | | Created By ↕ | | | |
| Weiteres Feedback | | Admin, 1st-Tenant | | | |

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

| Evaluation Templates | | | | | |
|-------------------------------------|--|---------|---------|----------------|--------|
| Template Type | Name | Visible | Version | Agent Feedback | Status |
| <input checked="" type="checkbox"/> | Agent evaluation telephone | | 1 | ✓ | |
| <input checked="" type="checkbox"/> | Default, Default 80.0 88.33 | | 1 | ✓ | |
| <input checked="" type="checkbox"/> | Agentenbewertung Telefon | | 1 | ✓ | |
| <input checked="" type="checkbox"/> | Call Director customer survey template | | 1 | ✗ | |
| <input checked="" type="checkbox"/> | Evaluation team AB campaign xy | | 1 | ✓ | |

Rows per page 20 1 - 5 of 5

Add Cancel

Fig. 91: Add evaluation template

- To add the selected evaluation template, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.
- To save the settings, click on the button *Save*.
To discard the change and close the window, click on the button *Cancel*.

5.3.5

Tab Quiz Templates

Here, you can add the quiz templates.



Quiz templates can only be added if a rating scheme has been selected in the tab *Details*.

<

Details*

Time Settings

Notifications*

Quiz Templates*

Agents*

>

Quiz Templates

Fig. 92: Add quiz templates (example)

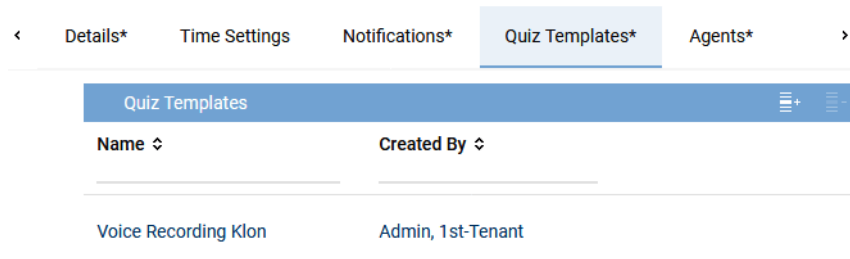
| | | |
|--|---------------|---|
| | <i>Add</i> | Opens a window in which you can select and add quiz templates. See chapter "Add quiz template", p. 77 . |
| | <i>Remove</i> | Deletes the selected quiz template. |



You can only add quiz templates with the status *Released* and *Draft*. Templates with the status *Deactivated* cannot be used.

5.3.5.1 Add quiz template

1. To add a quiz template, click on the icon  (*Add*).



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


| Quiz Templates | | | | |
|-------------------|-------------------|---------|---|-------------|
| Name | Created By | Version | Visible | Cloned From |
| Voice Recording 2 | Admin, 1st-Tenant | 1 |  | |



Fig. 93: Add quiz template

3. To add the selected quiz template, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.
4. To save the settings, click on the button *Save*.
To discard the change and close the window, click on the button *Cancel*.

5.3.6 Tab Agents

Here, you can compile the list of agents who are supposed to be assigned to the quality alarm. If you have not selected the option *All agents* in the tab *Details*, only those agents listed here are assigned to the quality alarm.

Quality Alarm

Details*

Time Settings

Notifications*

Agents*

Last Name ↕

First Name ↕

Agent

8.




Agent

7.


OK

Cancel

Fig. 94: Specific quality alarm - assign agents

| | | |
|---|--|---|
|  | <i>Add from organization structure</i> | Opens a window in which you can select agents from the organization structure, see chapter "Add agents from organization structure", p. 78. |
|  | <i>Add</i> | Opens a window in which you can add your own agents, see chapter "Add agents", p. 79. |
|  | <i>Remove</i> | Removes the selected agent from the list. |

5.3.6.1 Add agents from organization structure

1. Select the tab *Agents*, see [chapter "Tab Agents", p. 77.](#)
2. To assign agents from the organization structure, click on the icon  (*Add from organization structure*).

Last Name ↕

First Name ↕

No records found

Fig. 95: Agents

3. Click on the name of the organization unit in the left window.

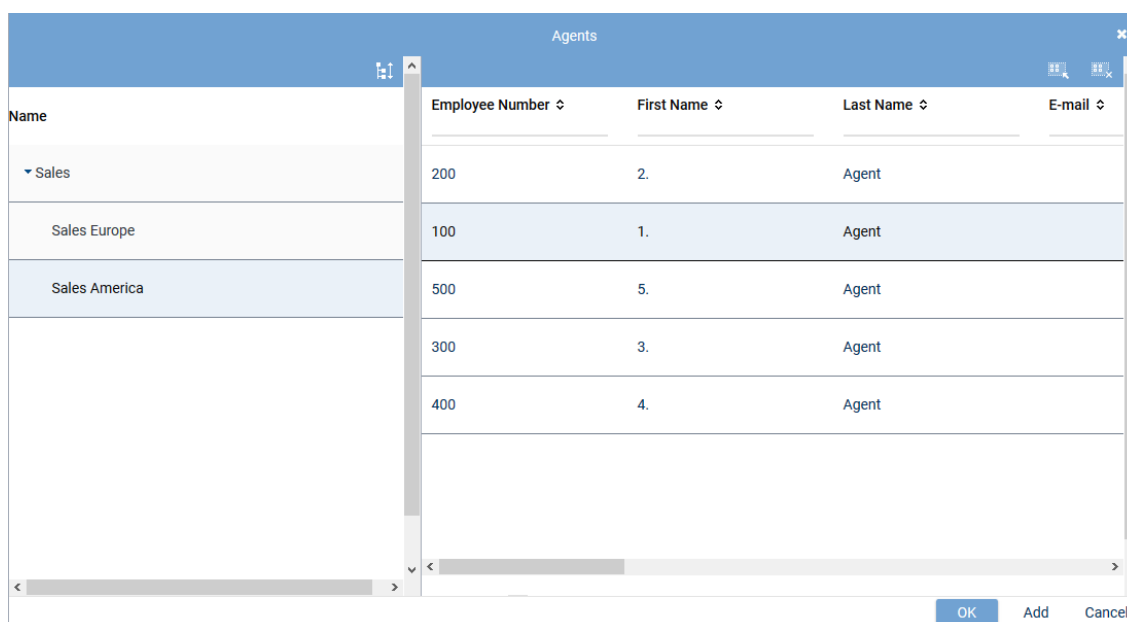




Fig. 96: Add agents from organization structure

- Select one or several agents from the list in the right window.
To select several agents or to revoke the selection, click on this line while holding the [Ctrl] key down.
To select all agents, click on the icon  (*Select all*).
To deselect all marked agents, click on the icon  (*Deselect all*).
- To add the selected agents and leave the window open for further adjustments, such as adding more agents from other organization structures, click on the button *Add*.
To add the selected agents and close the window, click on the button *OK*.
To discard the selection and close the window, click on the button *Cancel*.

5.3.6.2 Add agents

- Select the tab *Agents*, see [chapter "Tab Agents", p. 77](#).



You can only select agents of whose data you have access to.


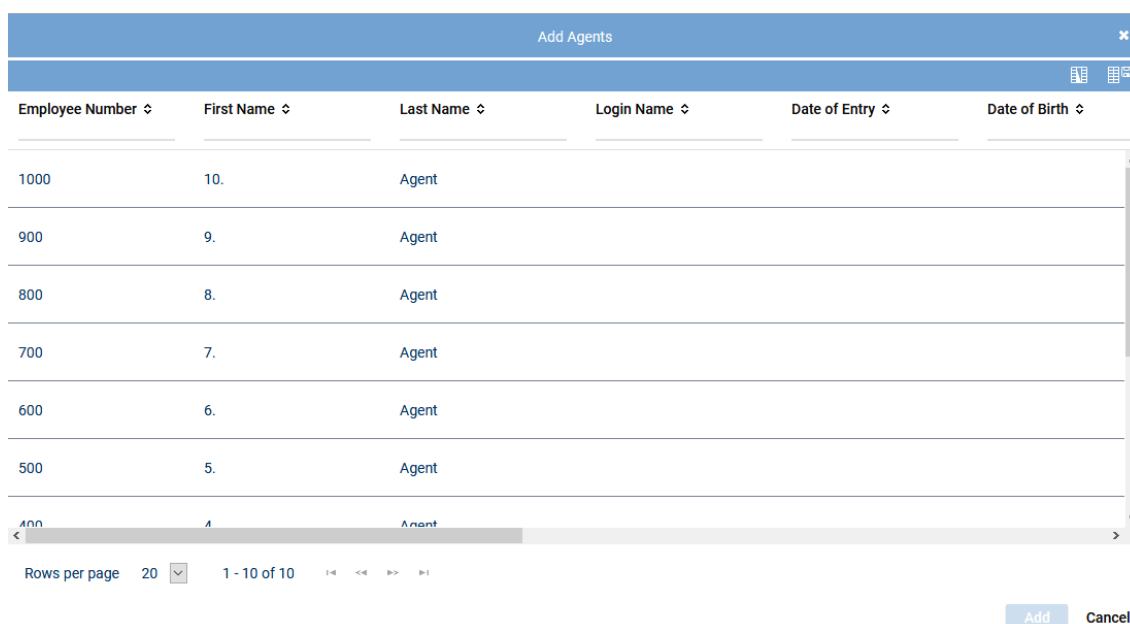
- To assign an agent, click on the icon  (*Add*).



Fig. 97: Agents (example)

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



| Employee Number | First Name | Last Name | Login Name | Date of Entry | Date of Birth |
|-----------------|------------|-----------|------------|---------------|---------------|
| 1000 | 10. | Agent | | | |
| 900 | 9. | Agent | | | |
| 800 | 8. | Agent | | | |
| 700 | 7. | Agent | | | |
| 600 | 6. | Agent | | | |
| 500 | 5. | Agent | | | |
| 400 | 4. | Agent | | | |
| 300 | 3. | Agent | | | |
| 200 | 2. | Agent | | | |
| 100 | 1. | Agent | | | |

Rows per page: 20 | 1 - 10 of 10 | < << >> >

Add Cancel

Fig. 98: Add own agents

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

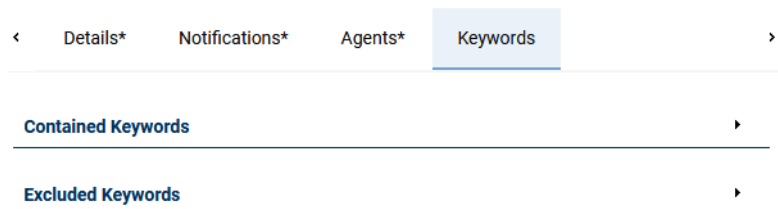
5.3.7

Tab Keywords

Here, you can define a search for keywords which are supposed or not supposed to be contained.



Keywords can only be added if an audio analysis job has been selected in the tab *Details*.



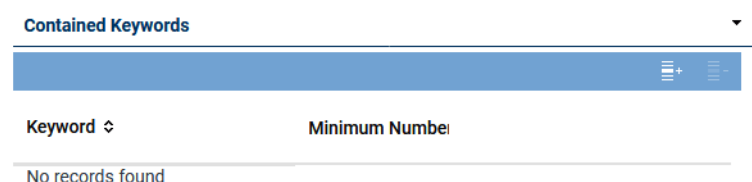
< Details* Notifications* Agents* Keywords >

Contained Keywords ▶

Excluded Keywords ▶

Fig. 99: Tab Keywords

Group field Contained Keywords

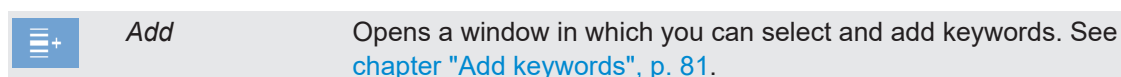


Contained Keywords ▼


| Keyword | Minimum Number |
|------------------|----------------|
| No records found | |

Fig. 100: Group field Contained Keywords

The quality alarm is issued if all configured keywords in their configured minimum number are found in the session.





Add Opens a window in which you can select and add keywords. See [chapter "Add keywords", p. 81](#).

| | | |
|---|---------------|-------------------------------|
|  | Remove | Deletes the selected keyword. |
|---|---------------|-------------------------------|

Group field Excluded Keywords



Excluded Keywords ▼

| Keyword ↕ | Minimum Number |
|------------------|----------------|
| No records found | |


Fig. 101: Group field *Excluded Keywords*

The quality alarm is issued if at least one configured keyword is not found in the session.

| | | |
|---|---------------|--|
|  | Add | Opens a window in which you can select and add keywords. See chapter "Add keywords", p. 81 . |
|  | Remove | Deletes the selected keyword. |

5.3.7.1

Add keywords

- To add keywords, click on the icon  (**Add**).
⇒ The following window appears:

Keywords

Name ↕

Himmel

Autobahn

Uhrzeit

Uhr

Zeit

Boden

...

Add

Cancel

Fig. 102: Add keywords (example)

- Select one or several keywords from the list.
To select several keywords or to revoke the selection, click on the respective line while holding the [Ctrl] key down.
- To add the selected keywords, click on the button **Add**.
To discard the selection and close the window, click on the button **Cancel**.
- Group field *Contained Keywords*: Enter the minimum number of the keyword directly into the entry field via the keyboard.
- To save the settings, click on the button **Save**.
To discard the change and close the window, click on the button **Cancel**.

5.4

Create quality alarm

- Click on the icon  (**Create**) in the main view.
- Select one of the following options:

| | |
|---|--|
| <i>Quality Alarm for Evaluations</i> | A new quality alarm for an evaluation is created. |
| <i>Quality Alarm for Quizzes</i> | A new quality alarm for a quiz is created. |
| <i>Quality Alarm for Keywords</i> | A new quality alarm for keywords is created. |
| <i>Quality Alarm for Real-Time Keyword Spotting</i> | A new quality alarm for real-time keyword spotting is created. |

In the tabs, you can adjust the corresponding settings. The tab *Evaluation Templates* and *Quiz Templates* are visible for the particular template type only.

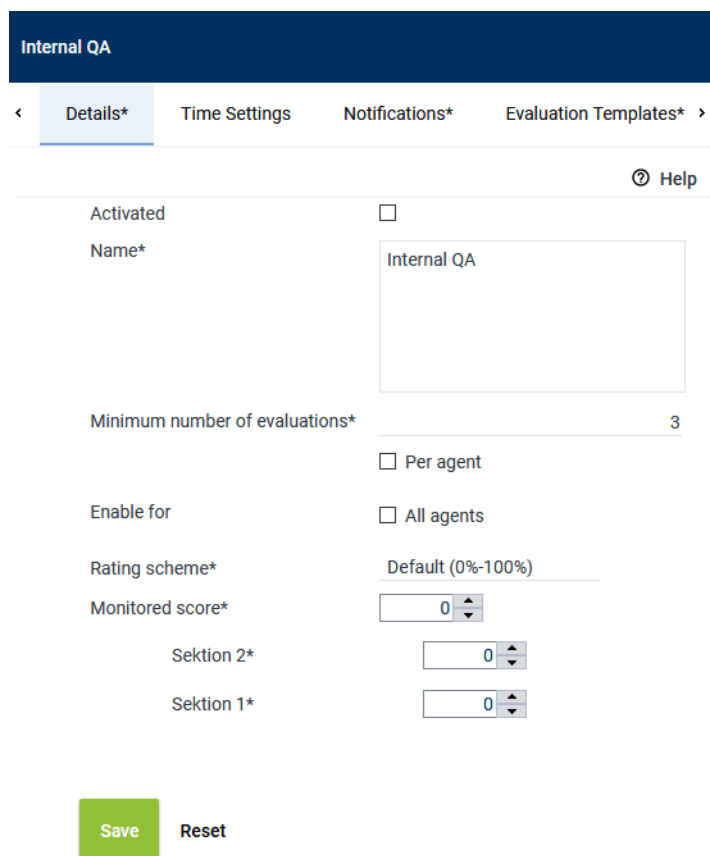


Fig. 103: Create quality alarm (example)

- *Details*

Here, you can display and edit detailed information about the selected quality alarm. See [chapter "Tab Details", p. 67](#).

- *Time Settings*

Here, you can adjust the time settings of the quality alarm. See [chapter "Tab Time Settings", p. 71](#).

- *Notifications*

Here, you can adjust the notification settings of the quality alarm. See [chapter "Tab Notifications", p. 72](#).

- *Evaluation Templates*

Here, you can add evaluation templates to the quality alarm. See [chapter "Tab Evaluation Templates", p. 75](#).

- *Quiz Templates*

Here, you can add quiz templates to the quality alarm. See [chapter "Tab Quiz Templates", p. 76](#).

- *Agents*

Here, you can add agents to the quality alarm. See [chapter "Tab Agents", p. 77](#).

- *Details*

Here, you can display and edit detailed information about the selected quality alarm. See [chapter "Tab Details", p. 67](#).

- *Time Settings*

Here, you can adjust the time settings of the quality alarm. See [chapter "Tab Time Settings", p. 71](#).

- *Notifications*

Here, you can adjust the notification settings of the quality alarm. See [chapter "Tab Notifications", p. 72](#).

- *Evaluation Templates*

Here, you can add evaluation templates to the quality alarm. See [chapter "Tab Evaluation Templates", p. 75](#).

- *Quiz Templates*

Here, you can add quiz templates to the quality alarm. See [chapter "Tab Quiz Templates", p. 76](#).

- *Agents*

Here, you can add agents to the quality alarm. See [chapter "Tab Agents", p. 77](#).

- *Keywords*

Here, you can define a search for keywords which are supposed or not supposed to be contained. See [chapter "Tab Keywords", p. 80](#).

3. Once you have finished adjusting the settings, click on the button *Save* to save the settings. To discard entries which have not yet been saved, click on the button *Reset*.



The fields marked with " * " are mandatory fields. These fields have to be filled out.

6 Assignments module

6.1 General

The Assignments module enables users to create random factors for selecting the sessions to be evaluated.

Since sessions are selected completely at random in the Assignments module, subjective factors on behalf of the evaluator can be minimized. That way, users cannot select sessions at will which could effect a negative evaluation of an agent. Instead, first several basic parameters are defined which determine the assignment of sessions to be evaluated. Existing parameters are, e. g. the number of sessions a supervisor can evaluate per month, which evaluation template is used and whether only sessions with a certain duration are supposed to be assigned. Then, the supervisor does not have to search for sessions to be evaluated anymore: In the Assignments module, the sessions to be evaluated as well as the evaluation template are preselected according to the previous settings. If a session should not qualify for evaluating for some reason, e. g. because the agent is hardly audible, you can define that a certain number of sessions may be replaced. Furthermore, it is possible to define a certain number of optional sessions that can be evaluated in addition.

The settings in the Assignments module prevent that the same session is evaluated twice in the current month. A session cannot be evaluated more than once in the same month. Sessions which have been evaluated in the Assignments module are marked with a flag and are no longer selected automatically for evaluation.

On the first day of every month, the sessions assigned and edited in the previous month are reset. This implies that the sessions assigned and edited in the previous month can be assigned for evaluation again.

Reset evaluations are not saved permanently. The 1st day of the month as general date for re-setting the evaluations cannot be changed.

This does not refer to manual evaluations. This implies that manual evaluations in the Sessions module and calibrations in the Calibrations module are still possible.



Only employees who have been assigned to an organization unit as supervisor in the application System Configuration in the Organization Structure module are displayed for the supervisor.

6.2 Main view

In the main view, all agents the logged-in users is allowed to see are displayed. Only the sessions of these agents can be evaluated.

| Assignments ▾ General ▾ | | | | |
|-------------------------|--------------|----------|-----------------|-----------|
| Last Name ▾ | First Name ▾ | E-Mail ▾ | Computer Name ▾ | Comment ▾ |
| Agent | 10. | | | |
| Agent | 9. | | | |
| Agent | 80. | | | |

Fig. 104: Main view

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

| | |
|-------------------|-------------------------------|
| <i>Last Name</i> | Shows the agent's last name. |
| <i>First Name</i> | Shows the agent's first name. |

| | |
|-------------------------|---|
| <i>E-Mail</i> | Shows the agent's e-mail address. |
| <i>Computer Name</i> | Shows the name of the agent's computer. |
| <i>Comment</i> | Shows comments about the agent. |
| <i>Default Template</i> | Shows the evaluation template which is used for an evaluation within the Agents module in the tab <i>Sessions</i> . |
| <i>Active</i> | Shows the number of sessions in the current month which have already been selected for evaluation but not evaluated yet. |
| <i>Evaluated</i> | Shows the number of sessions in the current month which have already been evaluated. |
| <i>Expired</i> | Shows the number of sessions in the current month which have already expired. The period of time available for an assigned session starts with a prompt for this session. |
| <i>Removed</i> | Shows the number of sessions in the current month which have been removed. |

6.2.1 Toolbar

The toolbar offers the following functions.



Fig. 105: Toolbar Assignments module

| | | |
|--------------------|---------------------------------|---|
| <i>Assignments</i> | <i>Administrate Settings</i> | Opens the General Parameters and Random Settings in the detail view. See chapter "Administrate settings", p. 85 |
| <i>General</i> | <i>Print</i> | Prints the table of the main view. |
| | <i>Adjust Table</i> | Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page |
| | <i>Save Table Configuration</i> | Saves the current table configuration of the main view as default view of the user. |
| | <i>Search</i> | Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see chapter "Search", p. 12 . |
| | <i>Reset Search</i> | Resets all manually entered search criteria. The search is started without manual filter settings. |
| | <i>General Help</i> | By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened. |
| | <i>Module Help</i> | By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened. |



In the user manual *INSPIRATIONneo - General information*, you find detailed descriptions of the default functions such as *Print*, *Adjust table* or *Help* if required.

6.2.1.1 Administrate settings

1. Click on the menu item *Calibrations > Administrate Settings* in the toolbar of the main view.
⇒ In the detail view, the section *Administrate Settings* appears.

The section contains the following tabs:

- *General Parameters*

Here, you can define the conditions for the evaluations. See [chapter "Tab General Parameters", p. 86](#)

- *Random Settings*

Here, you can define the conditions for the randomly selected sessions. See [chapter "Tab Random Settings", p. 87](#).

6.2.1.1.1 Tab General Parameters

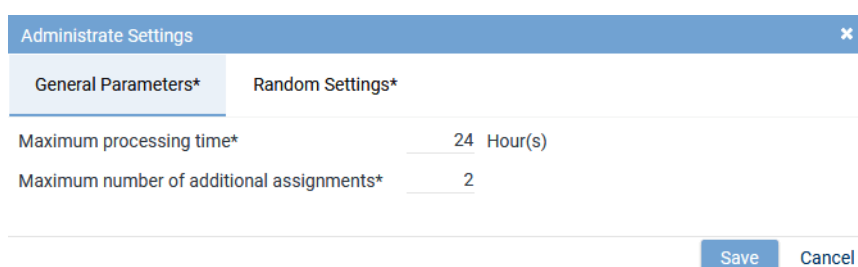





Fig. 106: Tab General Parameters

The following parameters can be adjusted:

| | |
|---|---|
| <i>Maximum processing time</i> | Enter the maximum time available to evaluate the session. The processing time starts the moment the session is requested. Expired sessions cannot be evaluated anymore. |
| <i>Maximum amount of additional assignments</i> | Enter how many additional sessions can be requested on top of the randomly assigned ones. |

The following functions are available:

| | |
|--|--|
|  | Saves the changed settings and closes the window <i>Administrate Settings</i> . |
|  or  | Discards the changed settings and closes the window <i>Administrate Settings</i> . |



The fields marked with " * " are mandatory fields. These fields have to be filled out.

6.2.1.1.2 Tab Random Settings

Administrate Settings
✕

General Parameters*

Random Settings

For calls
☒

Minimum duration of a session* Second(s)

Maximum duration of a session* Second(s)

Minimum number of sessions*

Maximum number of transfers*

Minimum number of assignments*

Evaluation template

For work items
☐

Minimum duration of a session* Second(s)

Maximum duration of a session* Second(s)

Minimum number of sessions*

Minimum number of assignments*

Evaluation template

For chats
☐

Minimum duration of a session* Second(s)

Maximum duration of a session* Second(s)

Minimum number of sessions*

Minimum number of assignments*

Evaluation template

Fig. 107: Tab Random Settings

Here, you can define which conversation types are supposed to be considered when selecting a session and make the following settings which may vary depending on the deleted conversation type:




| | |
|--------------------------------------|---|
| For calls/work items/chats | Select the conversation type of the session which is supposed to be considered. To do so, click on the respective check box. <input checked="" type="checkbox"/> = Conversation type has been activated. <input type="checkbox"/> = Conversation type has not been activated. |
| Minimum duration of a session | Enter how long a session has to be at last to be selected for an evaluation. |
| Maximum duration of a session | Enter how long a session can be at maximum to be selected for an evaluation. |
| Minimum number of sessions | Enter how many additional sessions can be requested on top of the randomly assigned ones. |
| Maximum number of transfers | Enter the maximum number of transfers within a session for the session to be selected for an evaluation. |

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| | |
|--------------------------------------|---|
| <i>Minimum number of assignments</i> | Enter the minimum number of assignments which have to be made. If the selected agent has fewer sessions of the selected type, then the user receives a message informing him that no more assignments of this type can be made. |
| <i>Evaluation template</i> | <p>From the drop-down list, select the evaluation template which is supposed to serve as the basis for the evaluation. Previously, the evaluation template must have been created in the Evaluation Templates module, see user manual <i>INSPIRATIONneo Templates module</i>.</p> <p>When no such evaluation template is selected, sessions can be requested but not evaluated.</p> |

The following functions are available:

| | |
|--|--|
|  | Saves the changed settings and closes the window <i>Administrate Settings</i> . |
|  or  | Discards the changed settings and closes the window <i>Administrate Settings</i> . |



The fields marked with " * " are mandatory fields. These fields have to be filled out.

6.3

Detail view

The detail view contains data and information about the evaluations of the selected agent.

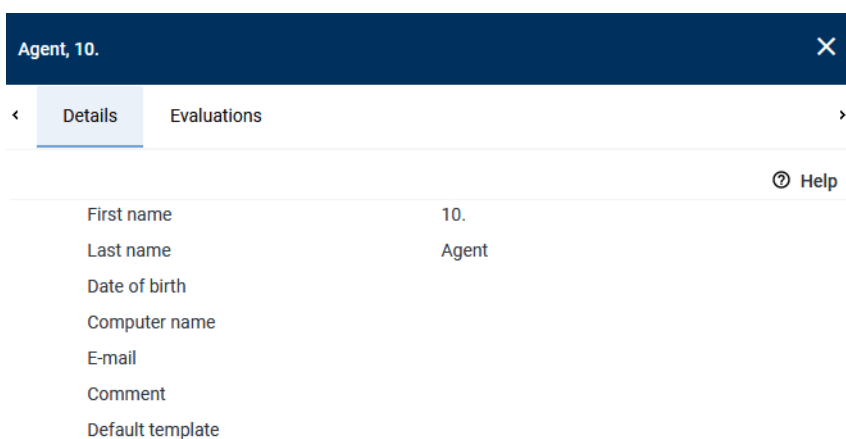


Fig. 108: Detail view

The detail view consists of the following tabs:

- *Details*

Shows the personal data of the selected agent.

See [chapter "Tab Details", p. 88](#).

- *Evaluations*

Here, you can request, replay, and evaluate sessions. In addition, you can see the number of the assignments and of the evaluated sessions.

See [chapter "Tab Evaluations", p. 89](#).

6.3.1

Tab Details

Shows the personal data of the selected agent.

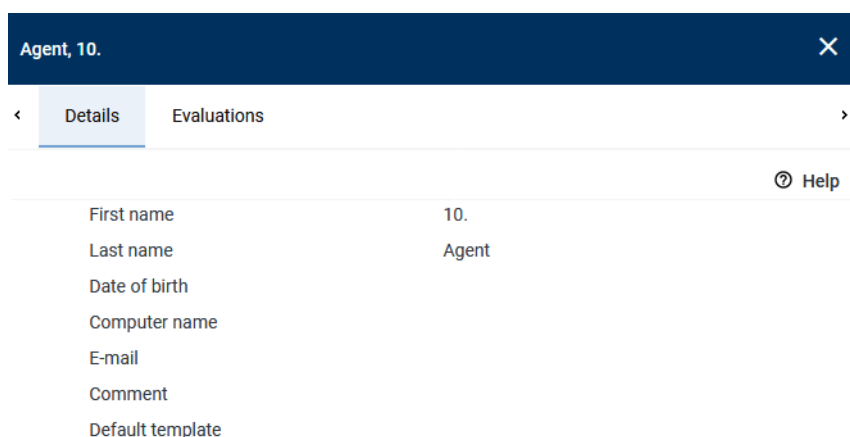


Fig. 109: Tab Details

| | |
|-------------------------|---|
| <i>First name</i> | Shows the agent's first name. |
| <i>Last name</i> | Shows the agent's last name. |
| <i>Date of birth</i> | Shows the agent's date of birth. |
| <i>Computer name</i> | Shows the name of the agent's computer. |
| <i>E-mail</i> | Shows the agent's e-mail address. |
| <i>Comment</i> | Shows comments about the agent. |
| <i>Default template</i> | Shows default evaluation templates for the agent. |

6.3.2 Tab Evaluations

Here, you can see information about the evaluations and evaluate sessions.

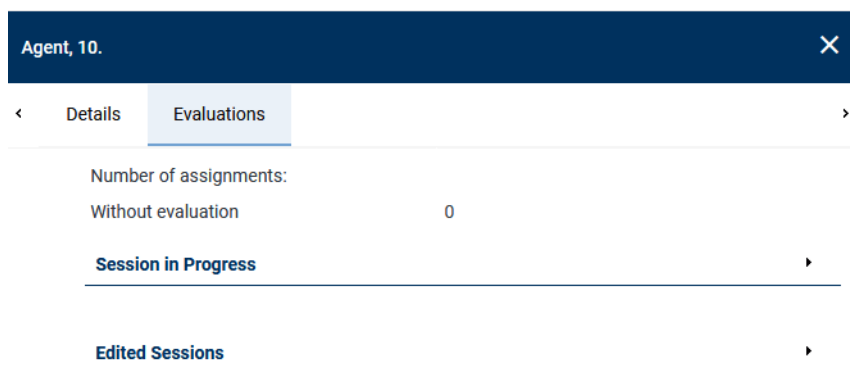


Fig. 110: Tab Evaluations (example)

| | |
|------------------------------|--|
| <i>Number of assignments</i> | Here, you can see the number of the requested sessions divided into the respective conversation types. The number in front of the dash indicates the number of the already requested sessions; the number behind the dash refers to the number of possible assignments. This value refers to the pre-settings in the main view and contains the automatically assigned as well as the additionally requested sessions. |
| <i>Without evaluation</i> | This number indicates how many of the assigned sessions have not yet been evaluated. |

Group field *Session in Progress*

The group field contains functions to evaluate a session and displays the session information in the editing mode.

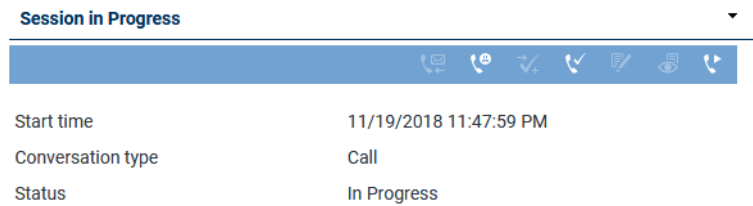









Fig. 111: Group field *Session in Progress* (example)

The toolbar of the group field offers different functions.



Fig. 112: Toolbar group field *Session in Progress*

The toolbar offers the following functions.

| | | |
|---|---------------------------------------|--|
|  | Request session | Selects a session from the pool of assigned sessions to be evaluated (see chapter "Request session", p. 91). |
|  | Remove | Removes the session from the editing mode (see chapter "Remove session", p. 92). |
|  | Request additional evaluations | Counts the number of possible sessions which can still be requested. Afterwards you can request additional sessions by clicking on the icon <i>Request session</i> . |
|  | Evaluate | Opens the evaluation template to evaluate a session (see chapter "Evaluate session", p. 93). |
|  | Edit evaluation | Opens the evaluation template to edit the open evaluation of a session (see chapter "Edit evaluation", p. 95). |
|  | Display evaluation | Opens the evaluation template to display the open evaluation of a session (see chapter "Display evaluation", p. 96). |
|  | Replay | Loads a selected conversation into the Video Viewer or the Message Viewer of the Replay module for replay (see chapter "Replay", p. 97). For information about the functions of the Replay module see chapter "Replay module", p. 98 . |

If a session is in progress, the following information is displayed:

| | |
|--------------------------|--|
| Start time | Shows the start time of the currently edited session. |
| Conversation type | Shows the conversation type of the currently edited session. |
| Status | Shows the status of the currently edited session. |

Group field *Open Evaluation*

This group field is only displayed when a session is in progress and the group field *Session in Progress* is open.



Fig. 113: Group field *Open Evaluation* (example)

| | |
|----------------------|---|
| <i>Template name</i> | Shows the name of the evaluation template. |
| <i>Result</i> | Shows the currently saved, but not yet released result of the evaluation. |

Group field *Edited Sessions*

The group field shows the sessions which have already been edited.

| Edited Sessions | | | |
|---------------------------|--------|-----------|-----------|
| Start Time ↕ | Type ↕ | Status ↕ | Comment ↕ |
| 11/19/2018 11:47:59 PM | ☎ | Evaluated | |

Fig. 114: Group field *Edited Sessions* (example)

| | |
|-------------------|--|
| <i>Start time</i> | Shows the start time of the sessions which have been edited. |
| <i>Status</i> | Shows the status of the finished edited sessions. <ul style="list-style-type: none"> • <i>Evaluated</i> The session has been evaluated and released. • <i>Removed</i> The session has been removed from editing and has not been evaluated. • <i>Expired</i> The evaluation of the session has been canceled automatically since the maximum processing time has been exceeded. |
| <i>Comment</i> | Shows the reason why the session has been removed from the editing. |

6.3.2.1 Request session



You cannot request or evaluate more than 1 session. Not before an evaluation has been released, can a new session be requested.

1. In the main view, click on the agent you would like to evaluate.

| Assignments ▾ General ▾ | | | | |
|-------------------------|--------------|----------|-----------------|-----------|
| Last Name ↕ | First Name ↕ | E-Mail ↕ | Computer Name ↕ | Comment ↕ |
| Agent | 10. | | | |
| Agent | 9. | | | |
| Agent | 80. | | | |
| Agent | 7. | | | |
| Agent | 6. | | | |

Rows per page 50 ▾ 1 - 10 of 10 < << >> >

Fig. 115: Select agent (example)

- Click on the tab *Evaluations* in the detail view.

Agent, 80.

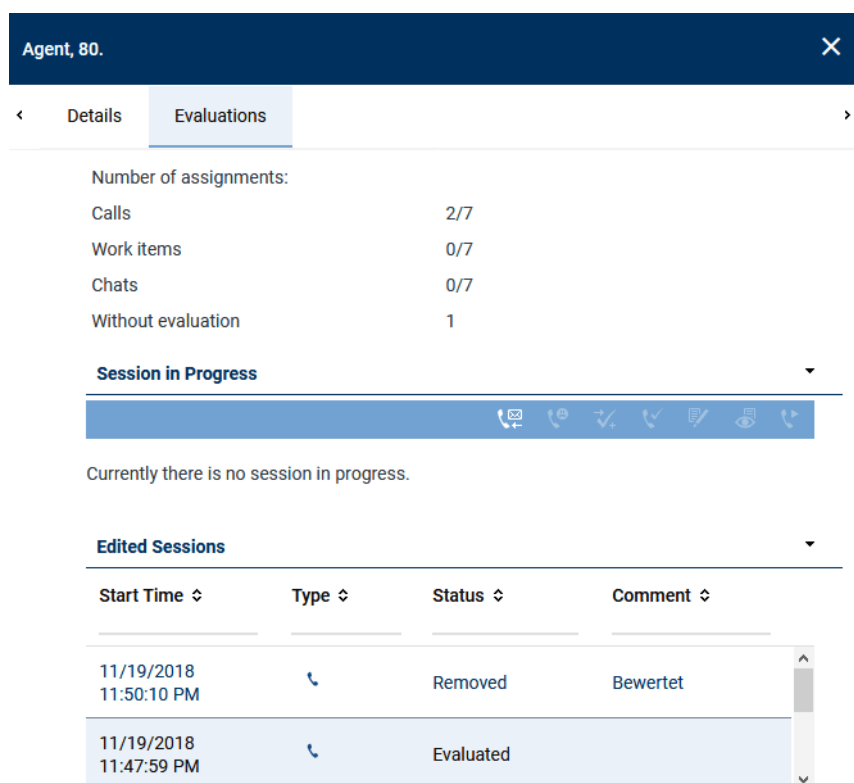
Details

Evaluations

Number of assignments:

| | |
|--------------------|-----|
| Calls | 2/7 |
| Work items | 0/7 |
| Chats | 0/7 |
| Without evaluation | 1 |

Session in Progress



Currently there is no session in progress.

Edited Sessions




| Start Time | Type | Status | Comment |
|---------------------------|---|-----------|----------|
| 11/19/2018 11:50:10 PM |  | Removed | Bewertet |
| 11/19/2018 11:47:59 PM |  | Evaluated | |

Fig. 116: Evaluations - detail view (example)

- Click on the icon  (*Request sessions*) in the toolbar of the group field *Session in Progress*.
⇒ You are assigned a session to evaluate.

6.3.2.2

Remove session



Only sessions with the status *In Progress* can be removed.

- Click on the icon  (*Remove*) in the toolbar of the group field *Session in Progress*.

Agent, 80.

Details
Evaluations

Number of assignments:
Calls 3/7
Work items 0/7
Chats 0/7
Without evaluation 2

Session in Progress

Start time 11/19/2018 8:59:33 PM
Conversation type Call
Status In Progress

Open Evaluation

Currently there is no open evaluation.

Edited Sessions

| Start Time ↕ | Type ↕ | Status ↕ | Comment ↕ |
|------------------------|--------|-----------|-----------|
| 11/19/2018 11:50:10 PM | 📞 | Removed | Bewertet |
| 11/19/2018 11:47:59 PM | 📞 | Evaluated | |

Fig. 117: Evaluations - detail view (example)

- In the entry field, enter a reason why you would like to remove the session.

Remove Session


Please enter a reason for removing the session.

Remove Cancel

Fig. 118: Remove session

- Click on the button *Remove*.
⇒ The assigned session is removed and not evaluated.
The assigned session is displayed in the group field *Edited Sessions* with the status *Removed* and the entered comment.

6.3.2.3 Evaluate session

- Click on the icon  (*Evaluate*) in the toolbar of the group field *Session in Progress*.
- Select one of the following options:
- The predefined evaluation template is opened.

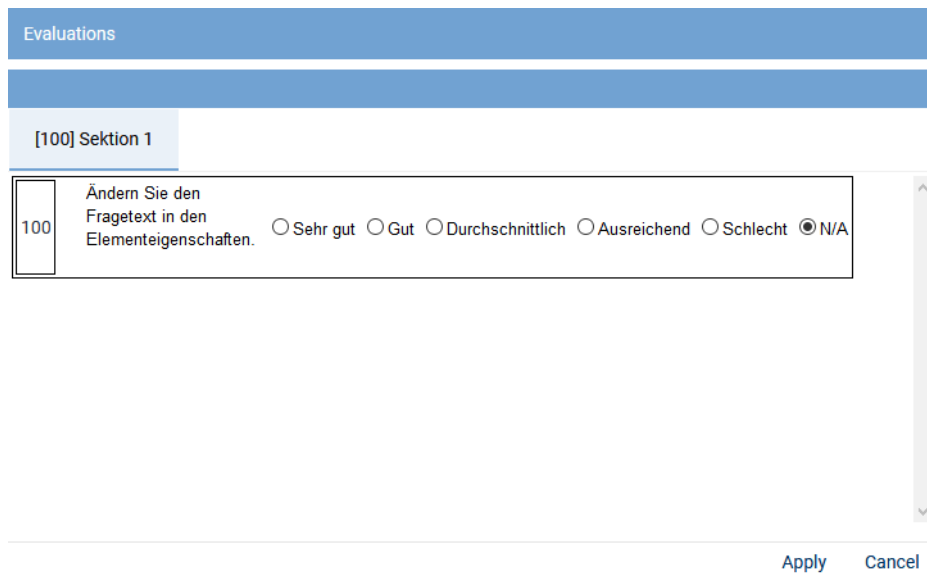


Fig. 119: Evaluations (example)

4. Complete the evaluation template accordingly.
5. To change the section in the evaluation template, click on the name of the section above the evaluation area.
6. During the evaluation you can replay the conversation in the Replay module.
For information about the functions of the Replay module see [chapter "Replay module", p. 98](#).
7. To apply the evaluation, click on the button *Apply*.
8. To release the evaluation, click on the button *Yes*.
If you do not want to release the evaluation to be able to continue editing it later, for instance, click on the button *No*.

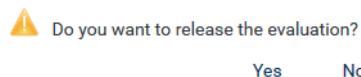


Fig. 120: Release evaluation

9. To close the evaluation template, click on the button *Close*.




Fig. 121: Evaluations (example)

10. The released evaluation is displayed in the group field *Edited Sessions* with the status *Evaluated*.
Evaluations which have not been released are displayed in the group field *Open Evaluation*.

6.3.2.4 Edit evaluation



Only sessions with the status *In Progress* can be edited.

- Click on the icon  (*Edit evaluation*) in the toolbar of the group field *Session in Progress*.
⇒ The predefined evaluation template is opened.

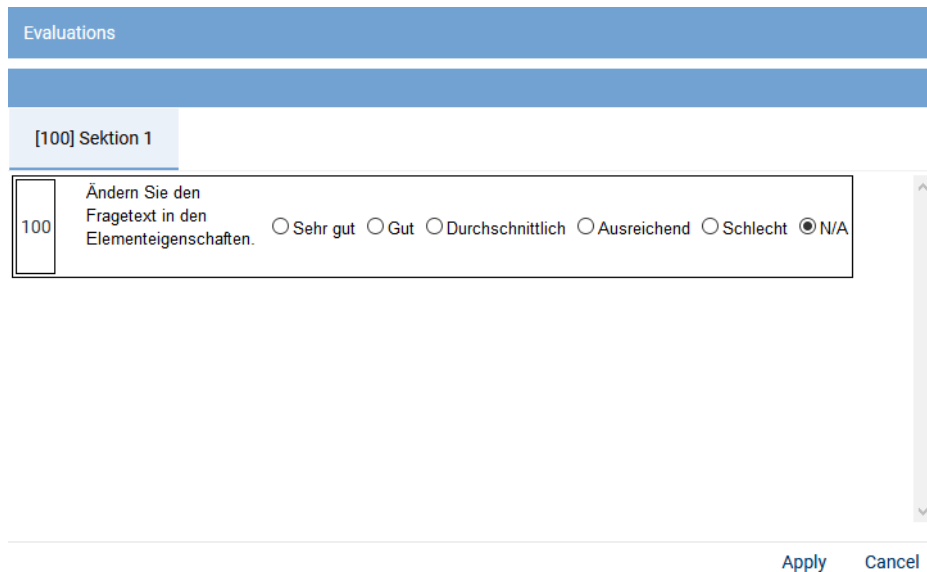


Fig. 122: Evaluations (example)

- Complete the evaluation template accordingly.
- To change the section in the evaluation template, click on the name of the section above the evaluation area.
- During the evaluation you can replay the conversation in the Replay module.
For information about the functions of the Replay module see [chapter "Replay module", p. 98](#).
- To apply the evaluation, click on the button *Apply*.
- To release the evaluation, click on the button *Yes*.
If you do not want to release the evaluation to be able to continue editing it later, for instance, click on the button *No*.

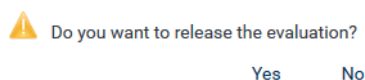


Fig. 123: Release evaluation

- To close the evaluation template, click on the button *Close*.

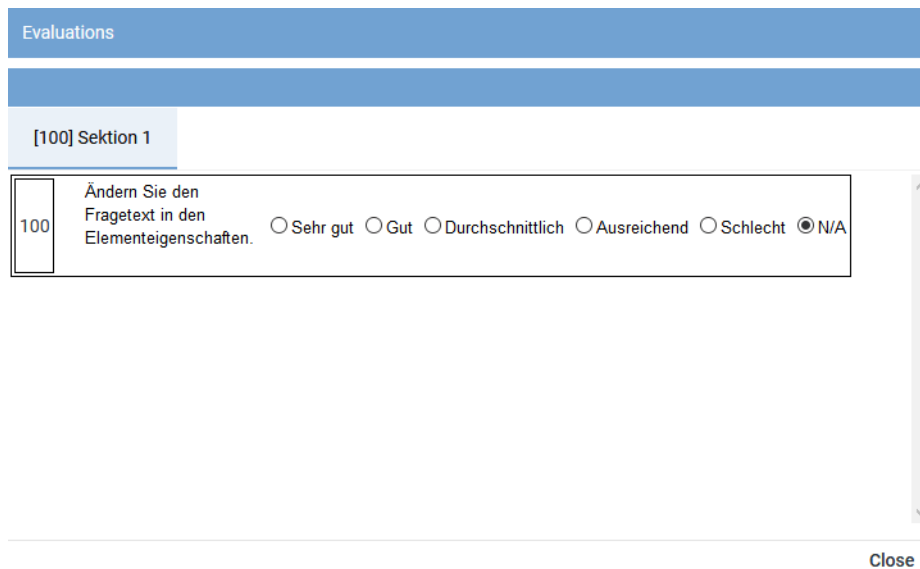


Fig. 124: Evaluations (example)


8. The released evaluation is displayed in the group field *Edited Sessions* with the status *Evaluated*. Evaluations which have not been released are displayed in the group field *Open Evaluation*.

6.3.2.5

Display evaluation



Only sessions with the status *In Progress* can be displayed.

1. Click on the icon  (*Display evaluation*) in the toolbar of the group field *Session in Progress*.
⇒ The following window appears:

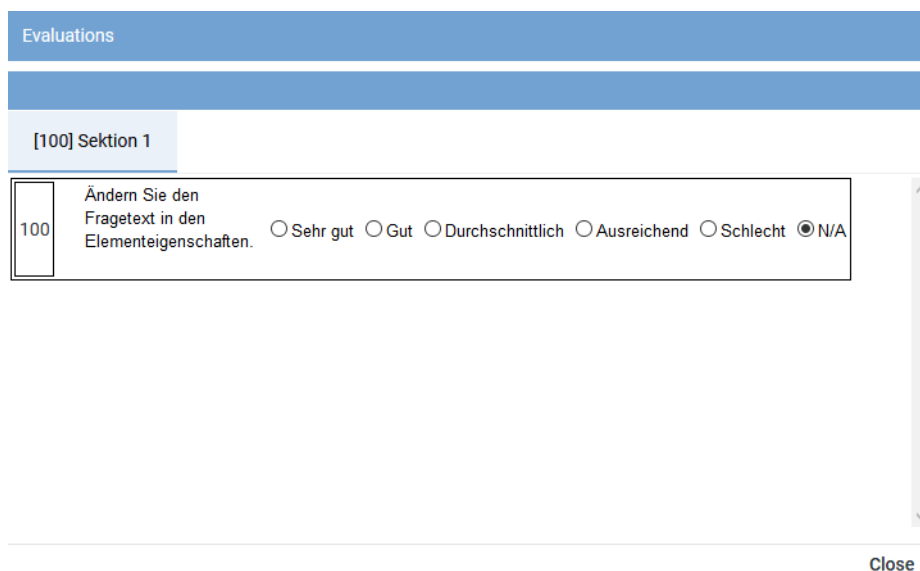



Fig. 125: Evaluations (example)

2. To change the section in the Evaluations window, click on the name of the section above the evaluation area.
3. To close the window *Evaluations*, click on the button *Close*.

6.3.2.6 Replay



Only sessions with the status *In Progress* can be replayed.

1. Click on the icon  (*Replay*) in the toolbar of the group field *Session in Progress*.
2. Select one of the following options:

| | |
|------------------------------|--|
| <i>Load All</i> | <p>The entire recorded session is loaded into the Replay module.</p> <p>If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module.</p> <p>If a text message has been saved, then the SMS or SDS recording is displayed in a separate window of the Replay module.</p> <p>If a chat recording has been saved, then the chat text is displayed in the Message Viewer of the Replay module.</p> <p>If a camera recording has been saved, then the camera video is displayed in the Video Viewer of the Replay module.</p> |
| <i>Load Audio</i> | <p>The voice recording of the session is loaded into the Replay module.</p> <p>This option is only active if a voice recording has been saved for the selected session.</p> |
| <i>Load Screen Recording</i> | <p>The screen recording of the session is loaded into the Video Viewer of the Replay module.</p> <p>This option is only active if a screen recording has been saved for the selected session.</p> |
| <i>Load SMS/SDS Text</i> | <p>The SMS or SDS recording of the session is loaded into a separate window of the Replay module.</p> <p>This option is only active if an SMS or SDS recording has been saved for the selected session.</p> |
| <i>Load Chat Text</i> | <p>The chat recording of the session is loaded into the Message Viewer of the Replay module.</p> <p>This option is only active if a chat recording has been saved for the selected session.</p> |
| <i>Load Video</i> | <p>The camera recording of the session is loaded into the Video Viewer of the Replay module.</p> <p>This option is only active if a camera recording has been saved for the selected session.</p> |

The respective options are only active if a recording with the respective conversation type has been saved for the selected session.

3. The conversation is loaded into the Replay module and can be replayed there.
For information about the functions of the Replay module see [chapter "Replay module"](#), p. 98.

7 **Replay module**

The Replay module serves to replay conversations. Conversations which are supposed to be replayed must be selected in the main view and loaded into the Replay module.

If conversations with screen or camera recordings are loaded into the Replay module, the window of the Video Viewer opens automatically for replaying the [video recording](#), see [chapter "Video Viewer", p. 111](#). The replay functions are executed synchronously for the conversation in the Replay module and for the video recording in the Video Viewer.

If conversations with chat texts or text messages (SMS or SDS) are loaded into the Replay module, the window of the Message Viewer opens automatically for displaying the chat texts or the text messages recording, see [chapter "Message Viewer", p. 113](#).





Fig. 126: Welcome screen (example)

| | | |
|---|-------------------|--|
| 1 | Replay bar | Shows the loaded conversations, see chapter "Replay bar", p. 98 . |
| 2 | Functionality bar | Contains functionalities for the loaded conversations in the replay bar, see chapter "Functionality bar", p. 101 . |

7.1 **Replay bar**

The replay bar shows the loaded conversations.

In the replay bar, there are 2 different views: the full view and the compressed view. To switch the view, go to the functionality bar on the right and click on the icon  (Switch to full view) or  (Switch to compressed view).

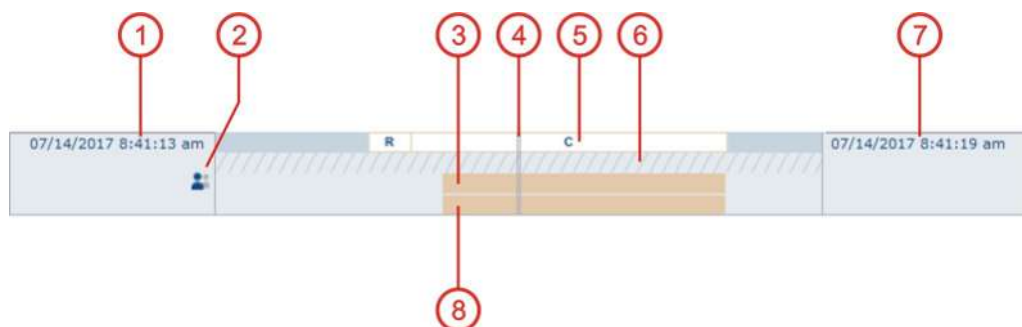


Fig. 127: Replay bar in the full view

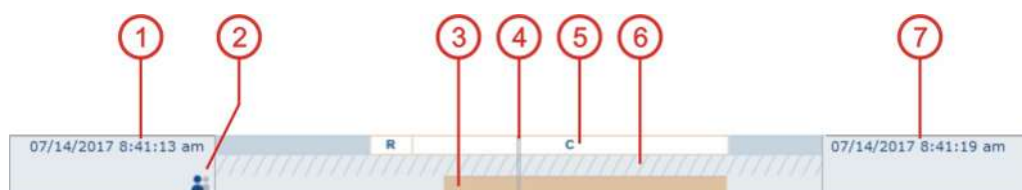







Fig. 128: Replay bar in compressed view

| | |
|---|--|
| 1 | Shows the start time of the loaded conversation. If several conversations have been loaded in 1 track, the start time of the earliest conversation is displayed here. |
| 2 | Displays information about the conversation participants. The information is only visible when the replay bar is displayed in full view.  = internal participants  = external participants  = mixed track with internal and external participants  = unknown participants  = screen recording To display the phone numbers of the participants in one track, move the mouse cursor across the participants icon. |
| 3 | Displays track 1 of a loaded conversation. For further information see chapter "Display of the loading states", p. 100 . |
| 4 | Shows the replay position. To change the current replay position of the loaded conversation, you have 2 possibilities: 1. Click on the respective replay position. 2. Click on a track, hold the mouse key down and drag the cursor to the left or to the right. |
| 5 | Shows the sections of the conversation. The following sections are possible: <ul style="list-style-type: none"> • R = Ringing (a connection is being established) • C = Connected (at least 2 participants are calling each other) • H = Hold (a participant is on hold) • Q = Queued (a participant has been queued) • W = Wrap-up (wrap-up time) |
| 6 | Shows tagging and audio analysis data (e. g. found keywords). The line is only displayed if information is available. |
| 7 | Shows the end time of the loaded conversation. If several conversations have been loaded in 1 track, the end time of the last conversation is displayed here. |
| 8 | Displays track 2 of a loaded conversation. For further information see chapter "Display of the loading states", p. 100 . |

7.1.1 Full view

In the full view, all tracks for voice and screen recording which belong to the loaded conversation are displayed in the replay bar of the Replay module.

When replaying stereo recordings with several internal participants, an echo effect occurs because the voices of some participants have been recorded several times. To avoid the echo effect, tracks with double recording have to be muted.

7.1.2 Compressed view

In the compressed view, no individual tracks for voice and screen recording are displayed in the replay bar of the Replay module. All recordings of a loaded conversation are combined in one group within one track.

In the compressed view, double recordings are suppressed automatically to avoid echo effects. If errors occur during recording, display the replay bar in full view and mute the single tracks manually.

7.1.3 Display of the loading states

The loaded conversation is assigned a basic color from a defined color palette.

The replay bar of the conversation shows its loading state. In the following, you find a description of the possible loading states.

1. Basis color (e. g. light brown) = Meta data loaded completely.

⇒ The conversation can be replayed.



Fig. 129: Meta data loaded completely

2. Empty = Meta data for the recording are missing.

⇒ The conversation cannot be replayed.



Fig. 130: Meta data for the recording is missing

3. Red striped basic color (only in full view) = Audio data of the recording is defective.

⇒ The conversation cannot be replayed.



Fig. 131: Defective packet in the meta data of the recording (full view)

4. Red dotted basic color (only in full view) = Packet in the meta data of the recording is missing.

⇒ The conversation cannot be replayed.



Fig. 132: Missing packet in the meta data of the recording (full view)

5. Red exclamation mark (only in compressed view) = Audio data of the recording is defective or packet in the meta data of the recording is missing.

For a more precise specification of the diagram change to the full view.

⇒ The conversation cannot be replayed.



Fig. 133: Defective or missing packet in the meta data of the recording (compressed view)

6. Basic color, light (e. g. ocher, light) = Data buffer empty.

Basic color (e. g. ocher) = Data buffer loaded.

⇒ The conversation can be replayed. An empty data buffer is reloaded automatically. If the server connection is slow, the replay may stop. As soon as the data buffer has been reloaded, the replay continues.



Fig. 134: Data buffer empty/loaded

7. Red = Data buffer not loaded completely.

⇒ The conversation is defective and cannot be replayed.

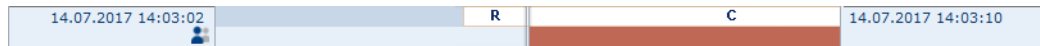


Fig. 135: Data buffer not loaded completely

8. Basis color (e. g. light brown) = Meta data loaded completely.
Red = Data buffer not loaded completely.
⇒ In the basic color section, the conversation can be replayed.
⇒ In the red section, the conversation is defective and cannot be replayed.

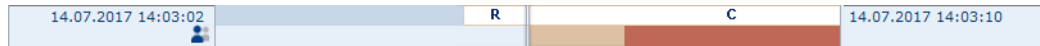


Fig. 136: Data buffer not loaded completely

9. Purple = Packet is muted during the recording.
⇒ The conversation can be replayed. There is nothing to be heard since no audio data has been recorded. Packets which have once been muted are muted permanently and cannot be changed afterwards.

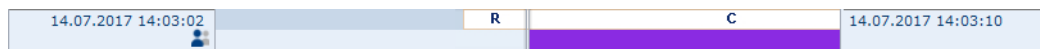


Fig. 137: Packet is muted during the recording

10. Basis color (e. g. light brown) = Meta data loaded completely.
Purple, light = Conversation section muted
⇒ The conversation can be replayed. In the muted conversation section, silence is replayed. The muted conversation section can be deleted so that the audio data can be replayed.



Fig. 138: Conversation section muted

11. Gray = The recording contains data which is not supported.
⇒ The conversation cannot be replayed.

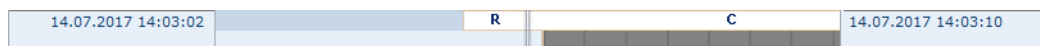


Fig. 139: The recording contains data which is not supported.

7.1.4 Display of detected emotions

If an emotion detection job has found emotions in a conversation, the event indicating an emotion is marked in the loaded conversation in a certain color depending on the event type. The position and length of the markings coincide with the occurrence and the duration of the event indicating an emotion in the conversation.



Fig. 140: Emotions detected in a conversation (example)

In the following, you find a description of the possible color markings:


















- Light blue indicates a section of silence.
- Red indicates a section of noise.
- Yellow indicates a section of cross talk or of massive cross talk.
- Green indicates unsuspicious audio sections.












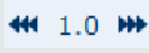




7.2 Functionality bar


The functionality bar contains functionalities for the loaded conversations in the replay bar.

7.2.1 Icons

In the following, you find a description of the icons.

| | | |
|---|--|--|
|  | <i>Play/Pause</i> | Starts the replay. |
|  | | Pauses the replay. |
|  | <i>Stop</i> | Stops the replay. |
|  | <i>Rewind</i> | Jumps back 5 seconds from the current replay position. |
|  | <i>Back</i> | Jumps to the start of the current or of the previous conversation. |
|  | <i>Fast-forward</i> | Jumps ahead 5 seconds from the current replay position. |
|  | <i>Next</i> | Jumps to the start of the next conversation. |
|  | <i>Lock element</i> | Shows that the lock for the Replay module has been deactivated. As a result, several conversations can be loaded into the Replay module. Note: In principle, you can load several video recordings into the Video Viewer. However, you can only replay one of them at any given moment. |
|  | | Shows that the lock for the Replay module has been activated. As a result, only one conversation can be loaded into the Replay module. |
|  | <i>Reconnect to the replay component</i> | Refreshes the server connection. |
|  | <i>Display video window</i> | Shows the Video Viewer in the main view of the application. |
|  | <i>Hide video window</i> | Shows the main view of the application. The Video Viewer integrated into the main view is hidden. |
|  | <i>Detach Video Viewer</i> | Displays the Video Viewer in its own window. |
|  | <i>Attach Video Viewer</i> | Closes the window of the Video Viewer. |
|  | <i>Unmute/Mute</i> | Shows that the speaker for the conversation has been activated. |
|  | | Shows that the speaker for the conversation has been deactivated. |
|  | <i>Volume</i> | Adjusts the general replay volume. |

| | | |
|---|-------------------------------------|--|
| | | To change the volume, click on the slider, hold the mouse key down and move the slider to the left or to the right. |
|  | <i>Clear playlist</i> | Removes all loaded conversations from the Replay module. |
|  | <i>Export all loaded elements</i> | Saves the audio data of the loaded conversations as WAVE file and the corresponding additional conversation data as CSV file on the hard disk of your computer, see chapter "Export all loaded elements", p. 104. |
|  | <i>Create new bookmark</i> | Sets a bookmark or marks the beginning of a conversation section at the current replay position, see chapter "Create new bookmark", p. 106. |
|  | | Sets a bookmark and marks the end of a conversation section at the current replay position. You can enter a comment for the marked area between the 2 associated bookmarks, see chapter "Create new bookmark", p. 106. |
|  | <i>Create new mute notification</i> | Marks the beginning of a conversation section at the current replay position in order to mute selected participants, see chapter "Create new mute notification", p. 108. |
|  | | Marks the end of a conversation section at the current replay position in order to mute selected participants, see chapter "Create new mute notification", p. 108. |
|  | <i>Loop</i> | Marks the beginning of a replay loop at the current replay position, see chapter "Mark replay loop", p. 110. |
|  | | Marks the end of a replay loop at the current replay position, see chapter "Mark replay loop", p. 110. |
|  | | Removes the taggings of the replay loop, see chapter "Mark replay loop", p. 110. |
|  | <i>Skip silence</i> | Shows that the automatic skipping of times of silence between individual conversations has been deactivated. |
|  | | Shows that the automatic skipping of times of silence between individual conversations has been activated. |
|  | | Shows the current replay speed. The replay speed can be adjusted between 0.5 and 2.0. To reduce the replay speed, click on the icon  <i>Reduce replay speed.</i> To increase the replay speed, click on the icon  <i>Increase replay speed.</i> |
|  | <i>Replay via phone</i> | Shows that the conversation replay via phone has been deactivated. |
|  | | Shows that the conversation replay via phone has been activated. |

To replay loaded conversations, click on the icon  (Play).

1 Minute 

Shows the time window for the loaded conversations.

You can enter the time window in 25 steps from 1 second to 14 days. There are 2 possibilities to change the time window:

1. On the right in the time window, click on + or -.
2. Turn the mouse wheel while the mouse cursor is located above the replay track.

20.11.2018 11:33:36



Shows the current replay position.

Click into the display field to switch from absolute to relative time display and vice versa.



The absolute time display shows the date and the time of the current replay position.

The relative time display shows the replayed time until the current replay position in HH:MM:SS.

Icons in the functionality bar on the right

| | | |
|---|---------------|---|
|  | Expanded view | Switches the replay bar to full view. |
|  | Simple view | Switches the replay bar to compressed view. |

Icons in the functionality bar on the left

| | | |
|---|-----------------|--|
|  | Display toolbar | Shows all icons in the functionality bar |
|  | Hide toolbar | Partly hides the icons in the functionality bar. |



Not all described icons exist in every module and application.

7.2.2

Export all loaded elements

1. Click on the icon  (*Export all loaded elements*).
⇒ The following window appears:

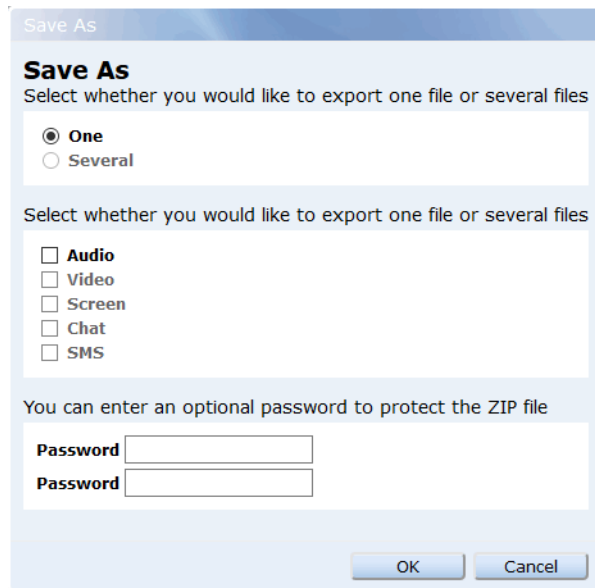


Fig. 141: Save as

2. Select the respective option in the window *Save As*.

| | |
|-----------------|---|
| <i>Single</i> | Mixes all recordings of one or several conversations in one file. |
| <i>Several</i> | Creates its own file for each recording to be saved. |
| <i>Audio</i> | Saves the audio data. |
| <i>Video</i> | Saves the video data . |
| <i>Screen</i> | Saves the screen recordings. |
| <i>Chat</i> | Saves a chat text. |
| <i>SMS</i> | Saves the SMS data. |
| <i>Password</i> | Protects the ZIP file with a password. |

3. Click on the button *OK*.
⇒ The following window appears:

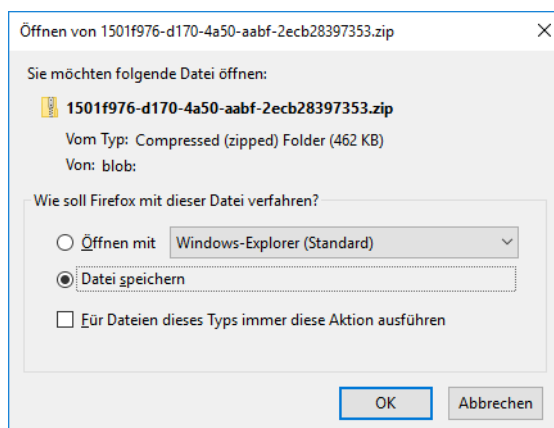


Fig. 142: Save conversations

4. Select the option *Save File*.
5. Click on the button *OK*.
⇒ The elements are exported to the local download directory in a ZIP file.
The ZIP file contains the following files:
The audio data is saved as [WAVE](#) file(s).

Audio data and screen recordings are saved as MP4 file(s).
 Video data is saved as MP4 file(s).
 Screen data is saved as MP4 file(s).
 The corresponding meta data is saved in the same directory as CSV file(s) under the same file name.
 Chat texts are saved as XML file(s).
 SMS data is saved as XML file(s).

7.2.3 Create new bookmark

The intention is not to create only one single bookmark. The beginning and the end of a conversation section have to be marked with a new bookmark. You can enter a replay comment for this tagged conversation section between 2 bookmarks.

In a conversation, several conversation sections can be marked with bookmarks and commented.





It is not possible to delete only 1 bookmark from a tagged conversation section.

7.2.3.1 Create bookmarks with replay comment



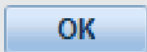

The current replay position has to be located within the conversation.

1. To mark the beginning of a conversation section for a replay comment, click on the icon  (*Create new bookmark*).
2. To mark the end of a conversation section for a replay comment, click on the icon  (*Create new bookmark*).

⇒ The following window appears:



Fig. 143: Tagging editor

| | |
|---|---|
|  | Saves the entries and closes the window. |
|  | Discards the entries and closes the window. |

3. Enter a comment for the conversation in the entry field.



Fig. 144: Tagging editor with entered comment (example)

4. To save the entries, click on the button **OK**.
 - ⇒ The tagged conversation section is displayed in other color above the replay bar.
 - ⇒ When replaying the conversation, the information details are displayed in the area of the tagging.



Fig. 145: Conversation with tagged conversation section (example)

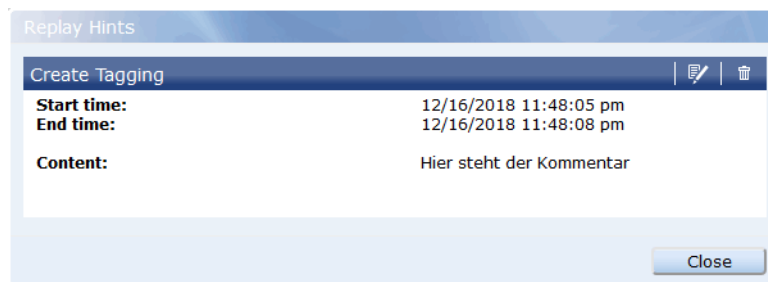


Fig. 146: Displayed information details (example)

7.2.3.2 Edit bookmarks with replay comment

1. As soon as the tagged conversation section with the replay comment is located above the replay position, the following window appears:

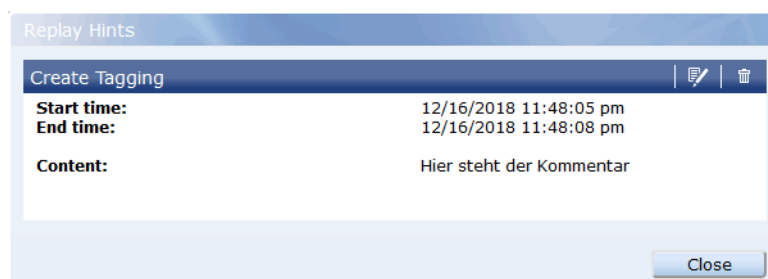



Fig. 147: Displayed information details (example)

2. Click on the icon  (**Edit**).
 - ⇒ The following window appears:

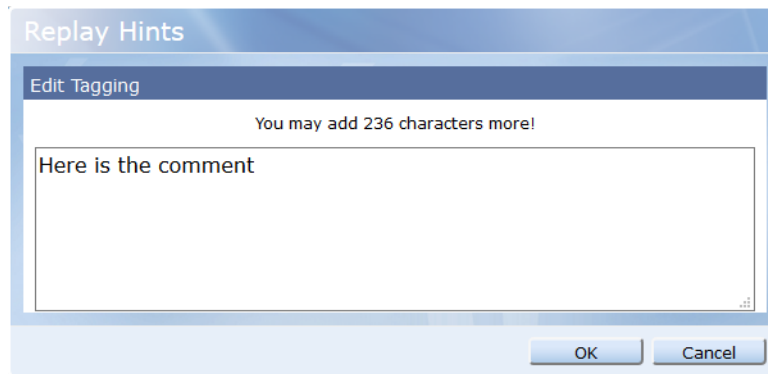


Fig. 148: Edit tagging (example)

| | |
|---------------|---|
| OK | Saves the entries and closes the window. |
| Cancel | Discards the entries and closes the window. |

3. Edit the replay comment.
4. To save the entries, click on the button **OK**.

7.2.3.3 Delete bookmarks with replay comment

1. As soon as the tagged conversation section with the replay comment is located above the replay position, the following window appears:

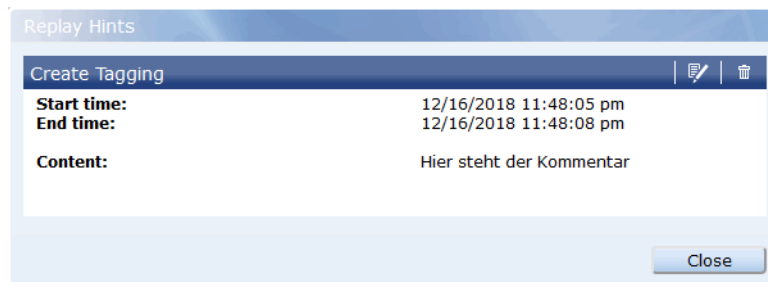



Fig. 149: Displayed information details (example)

2. Click on the icon  (*Delete*).
To delete the tagged conversation area with the replay comment, confirm the security prompt.

7.2.4 Create new mute notification

The intention is not to create only one single mute notification. The beginning and the end of a conversation section have to be marked with a new mute notification. This tagged conversation section between 2 mute notifications can be muted for selected participants.

In a conversation, several conversation sections can be marked with mute notifications and selected participants can be muted.





It is not possible to delete only 1 mute notification from a tagged conversation section which marks the beginning or the end.

7.2.4.1 Mute conversation section



The current replay position has to be located within the conversation.

1. To mark the beginning of a conversation section for the muting of selected participants, click on the icon  (*Create new mute notification*).

2. To mark the end of a conversation section for the muting of selected participants, click on the icon  (*Create new mute notification*).
⇒ The following window appears:

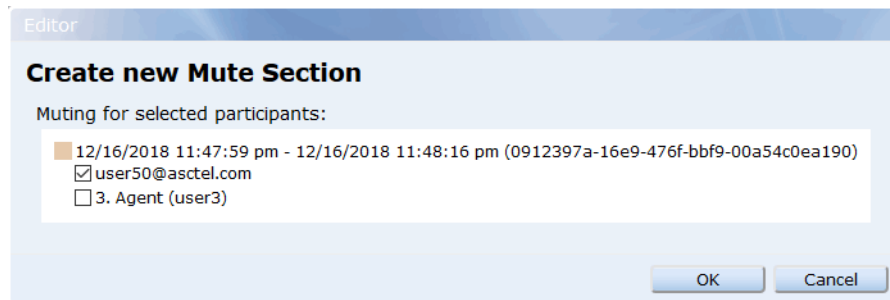
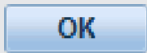



Fig. 150: Muting for selected participants (example)

| | |
|---|---|
|  | Saves the entries and closes the window. |
|  | Discards the entries and closes the window. |

3. Select the participants for whom the conversation section is supposed to be muted. At least 1 participant has to be muted.
☒ = Conversation muted for participant
☐ = Conversation not muted for participant
4. To save the entries, click on the button **OK**.
 ⇒ The muted conversation section is displayed as a gray area in the replay bar.
 ⇒ When replaying the conversation, the mute section details are displayed in the area of the muting.

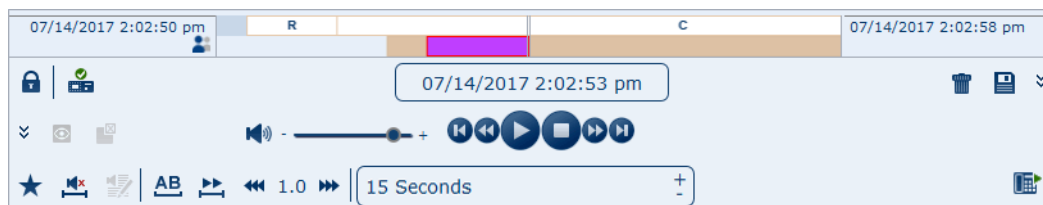


Fig. 151: Conversation with muted conversation section (example)

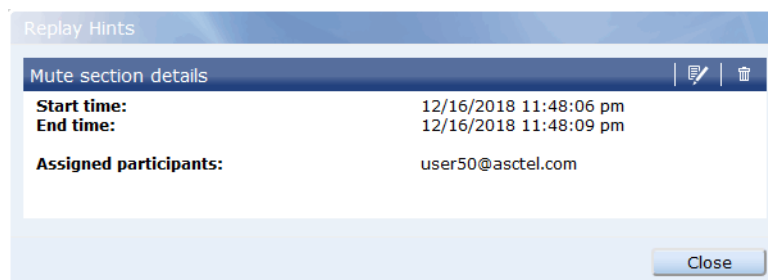


Fig. 152: Displayed mute section details (example)

7.2.4.2 Edit muted conversation section

1. As soon as the muted conversation section is located above the replay position, the following window appears:

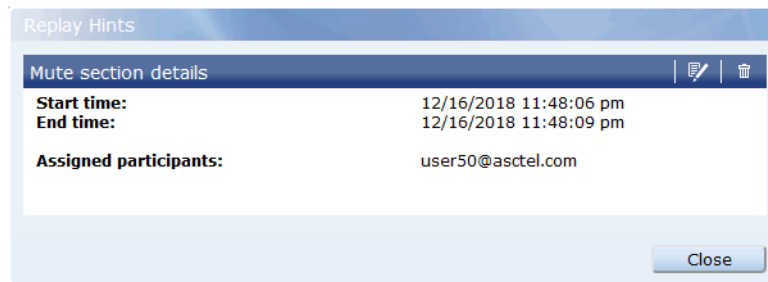



Fig. 153: Mute Section Details (example)

2. Click on the icon  (Edit).
⇒ The following window appears:

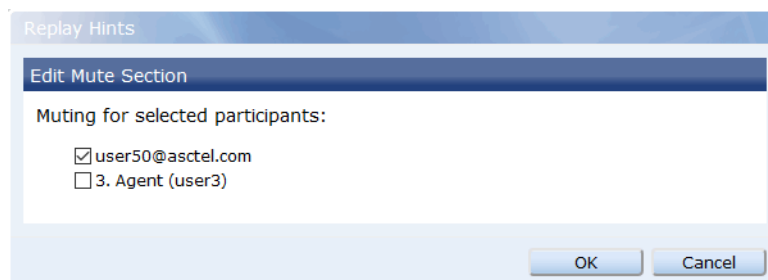
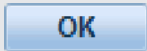



Fig. 154: Edit mute section (example)

| | |
|---|---|
|  | Saves the entries and closes the window. |
|  | Discards the entries and closes the window. |

3. Select the participants for whom the conversation section is supposed to be muted. At least 1 participant has to be muted.
☒ = Conversation muted for participant
☐ = Conversation not muted for participant
4. To save the entries, click on the button **OK**.

7.2.4.3 Delete muted conversation section

1. As soon as the muted conversation section is located above the replay position, the following window appears:

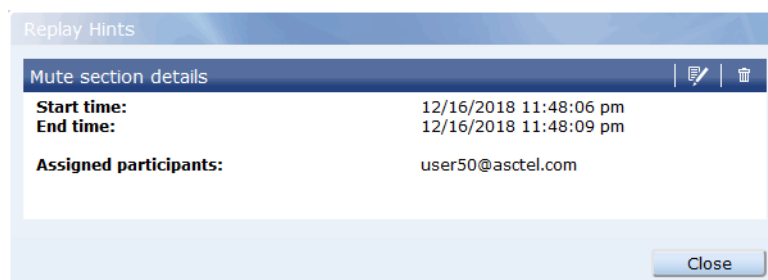





Fig. 155: Mute Section Details (example)

2. Click on the icon  (Delete).
To delete the mute section, confirm the security prompt.

7.2.5 Mark replay loop

1. To mark the beginning of a replay loop at the current replay position, click on the icon  (Loop).
2. To mark the end of a replay loop at the current replay position, click on the icon  (Loop).

⇒ When the replay is started, the area between the marks is replayed in an endless loop.

3. To remove the marks of the replay loop, click on the icon  (Loop).



Fig. 156: Conversation with replay loop

7.3

Video Viewer





The Video Viewer serves to replay screen and camera recordings (video recordings).



In principle, you can load several video recordings into the Video Viewer. However, you can only replay one at any given moment.



Fig. 157: Video Viewer (example)

| | | |
|---|--|---|
| 1 | Option bar | Contains settings for displaying video recordings, see chapter "Option bar", p. 112. |
| 2 | Main view | Shows the Video recording . |
| 3 | Replay bar | Shows the loaded video recordings, see chapter "Replay bar", p. 112. |
| 4 | Functionality bar | Contains functionalities for the loaded conversations in the replay bar, see chapter "Icons", p. 102. In the Video Viewer, not all icons of the Replay module are available. |
| 5 |  (Minimize) | Minimizes the on-screen display to the program icon in the taskbar. |
| 6 |  (Maximize) | Maximizes the on-screen display to full-screen size. |
| |  (Reconstruct) | Reduces the on-screen display to the most recently selected reduced window size. |
| 7 |  (Close) | Closes the window of the Video Viewer. |

7.3.1 Option bar

The option bar contains settings for displaying video recordings.



Fig. 158: Option bar

In the following, you find a description of the settings.

| | |
|---------------------|--|
| Aspect ratio | <p>This option is only active if <i>Adjust to Window</i> has been activated upon setting the video size. When setting the video size to <i>Original</i> and <i>User-Defined</i>, the setting <i>Aspect ratio</i> is deactivated.</p> <ul style="list-style-type: none"> • <i>Keep</i> The original aspect ratio of the video recording remains unchanged in the window of the main view of the Video Viewer. • <i>Ignore</i> The display of the video recording is adjusted to the window size of the main view of the Video Viewer. The aspect ratio is ignored, i. e. the display may be distorted. • <i>Original</i> The video recording is displayed in its original size in the main view of the Video Viewer. |
|---------------------|--|

7.3.2 Replay bar

The replay bar shows the loaded video recordings.

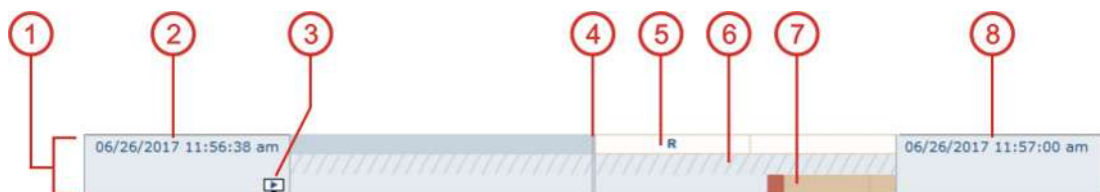


Fig. 159: Replay bar

| | |
|---|--|
| 1 | Shows the track of a loaded video recording . |
| 2 | Shows the start time of the loaded conversation. If several conversations have been loaded in 1 track, the start time of the earliest conversation is displayed here. |
| 3 | Shows that this is the track of a video recording . |
| 4 | Shows the replay position. To change the current replay position of the loaded conversation, you have 2 possibilities: <ol style="list-style-type: none"> 1. Click on the respective replay position. 2. Click on a track, hold the mouse key down and drag the cursor to the left or to the right. |
| 5 | Shows the sections of the conversation. The following sections are possible: <ul style="list-style-type: none"> • R = Ringing (a connection is being established) • C = Connected (at least 2 participants are calling each other) • H = Hold (a participant is on hold) • Q = Queued (a participant has been queued) • W = Wrap-up (wrap-up time) |
| 6 | Shows tagging and audio analysis data (e. g. found keywords). The line is only displayed if information is available. |
| 7 | Shows the conversation. For further information see chapter "Display of the loading states", p. 100 . |
| 8 | Shows the end time of the loaded conversation. If several conversations have been loaded in 1 track, the end time of the last conversation is displayed here. |

7.4

Message Viewer

The Message Viewer serves to display chat texts or text messages (SMS or SDS).

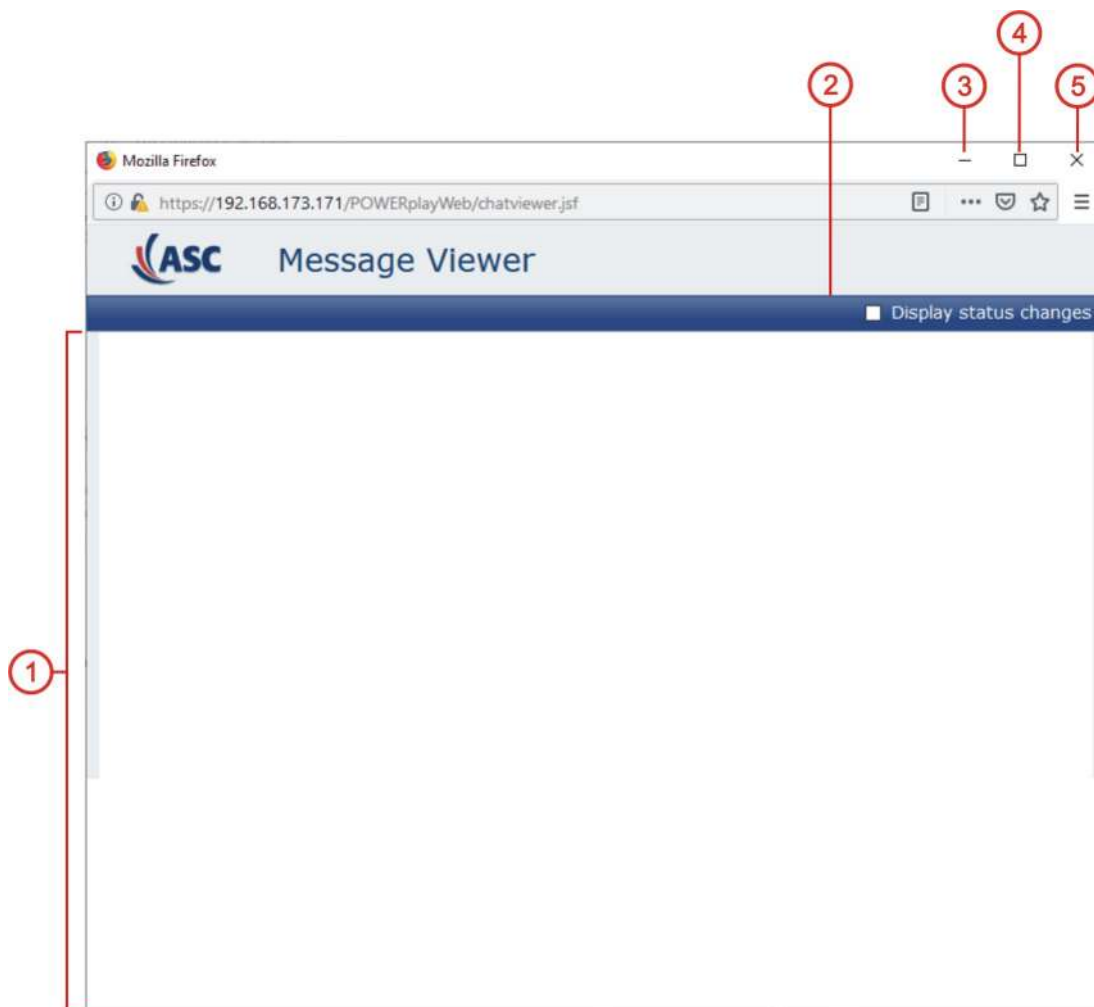






Fig. 160: Message Viewer

| | | |
|---|--|--|
| 1 | Main view | Displayed chat texts or text messages. See chapter "Main view", p. 114. |
| 2 | <i>Display status changes</i> | <input checked="" type="checkbox"/> = Displays the status changes. <input type="checkbox"/> = Does not displays the status changes. |
| 3 |  (Minimize) | Minimizes the on-screen display to the program icon in the taskbar. |
| 4 |  (Maximize) | Maximizes the on-screen display to full-screen size. |
| |  (Reconstruct) | Reduces the on-screen display to the most recently selected reduced window size. |
| 5 |  (Close) | Closes the window of the Message Viewer. |

7.4.1 Main view

The main view displays chat texts or text messages.

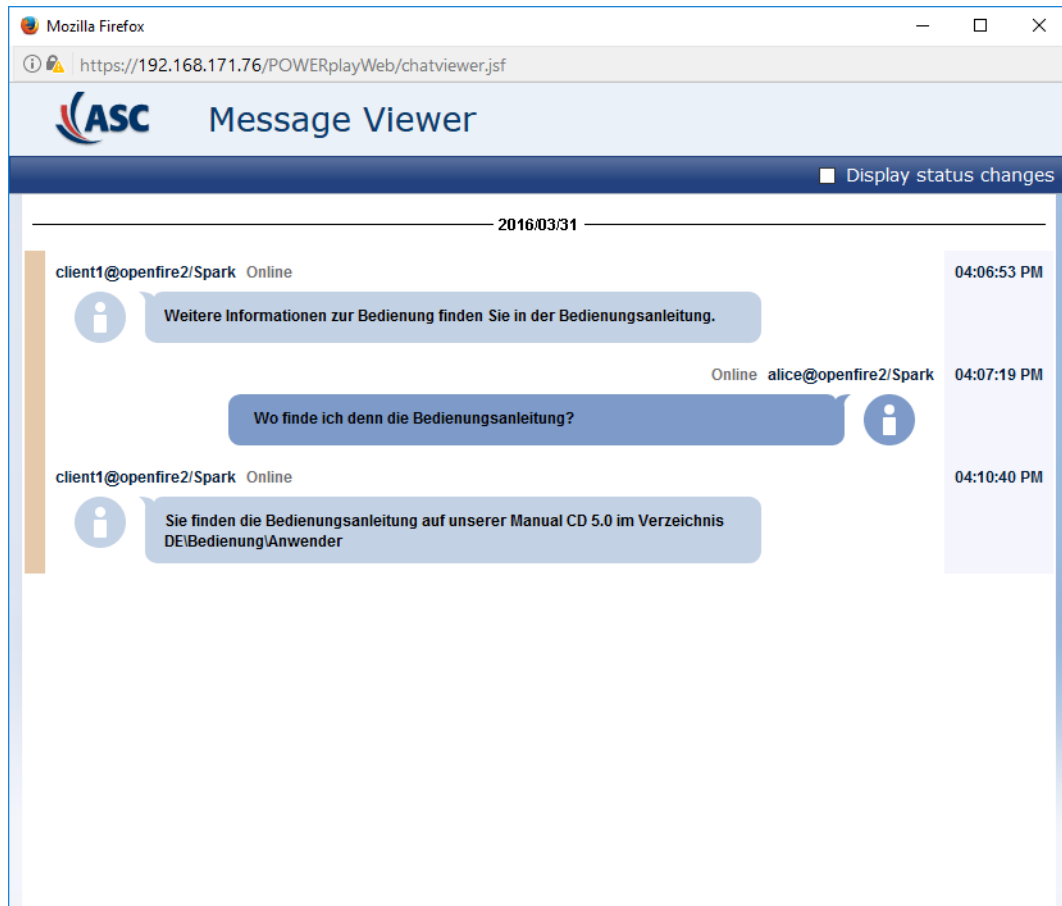


Fig. 161: Message Viewer without the display of the status changes (example)

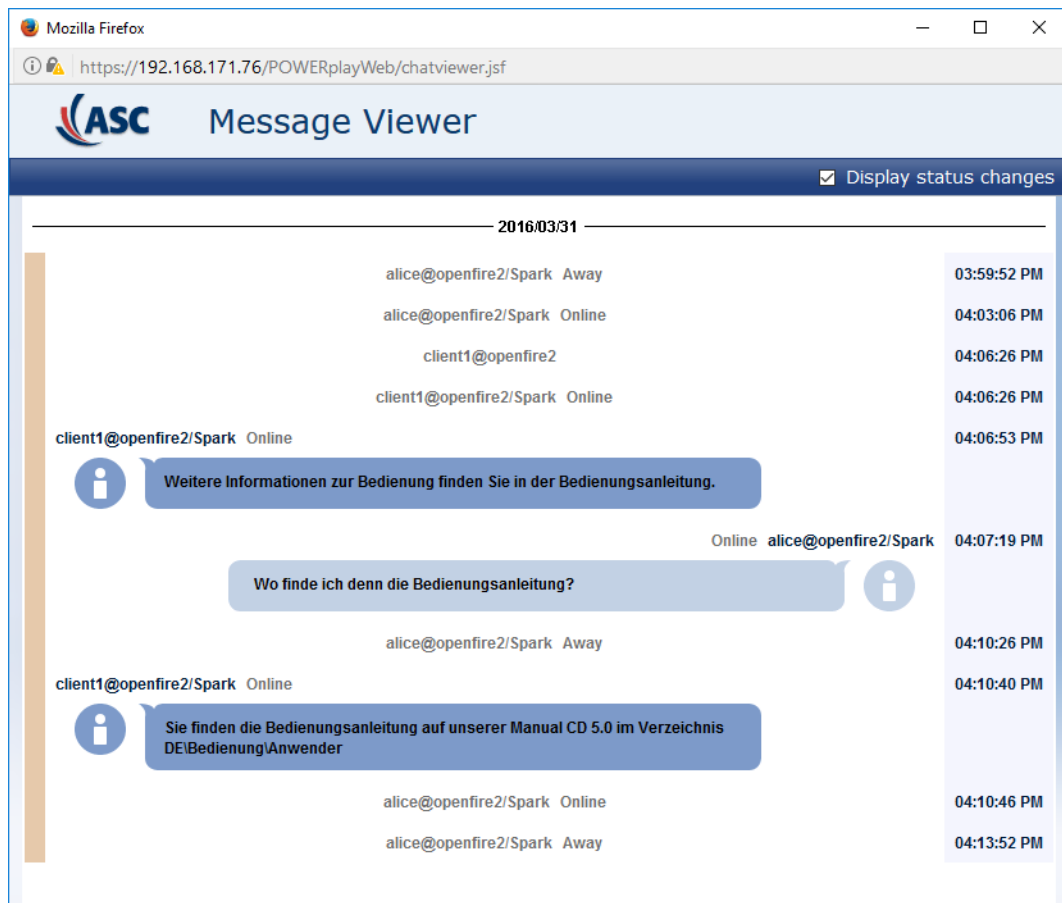


Fig. 162: Message Viewer with the display of the status changes (example)

The chat texts or text messages are displayed sorted by date and time. The most recent message is displayed at the bottom.

On the left of the main view, the basic color of the conversation is displayed. If several conversations have been loaded, the basic colors on the left indicate which chat texts or text messages belong together.

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Glossary

Video data

Video data can either consist of camera recordings of a video call or of screen recordings.

Video recording

A video recording can either consist of a screen video or of a camera video.

WAVE

The WAVE file format is a container format to digitally save audio files. It is based on the Resource Interchange File Format (RIFF) which is defined by Microsoft for Windows. A WAVE file already contains information about the format of the audio data before the audio data are actually stored.

XML

Extensible Markup Language is a human-readable and machine-readable language which defines a set of rules for encoding documents.