INSPIRATION*neo*

General information

User manual

5/20/2019

Product line *neo*, version 6.x

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

INSPIRATION*neo*

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Contents

1 General information

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

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

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

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

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

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

2 Introduction

INSPIRATION*neo* is a server-based application which users can access via a browser.

The application INSPIRATION*neo* is a solution which is installed on already existing voice recording systems. INSPIRATION*neo* is structured in modules and can be used in different fields of workforce optimization (WFO). One of these fields is the quality management in call centers. Recorded calls are used there to verify the agent communication and evaluate it. The recorded calls and optionally the screen content can be evaluated on the basis of individually created templates. These evaluations are the basis for informative result reports. The insights and findings help revealing and tapping potential for improvement. Comprehensive e-learning functions allow creating and assigning relevant trainings to eliminate the identified deficits of the respective employee. The training success can be checked by means of quizzes.

INSPIRATION*neo* offers flexible and individual possibilities of access control. This ensures that the trainers, the superiors (e. g. supervisors) as well as the agents themselves can analyze the calls. This maximizes the learning effect.

The following functionalities are possible:

- **Creating evaluation templates**

  To make it possible for supervisors to evaluate sessions efficiently, company-specific evaluation templates can be created in advance and edited in the system. These templates can contain all evaluation criteria which are important for an extensive and correct evaluation of the sessions in the contact center.

- **Replaying sessions and executing evaluations**

  Once sessions have been recorded and evaluation templates created, supervisors can filter for specific sessions and make evaluations by using various search functionalities.

- **Executing audio analyses**

  Users can search for specific content in the recorded sessions as well as evaluate or sort them according to different methods of audio analysis.

- **Creating reports**

  Once the evaluation has been concluded, users can select templates and apply them to certain evaluation data to create reports in text form or with graphs.

- **Using e-learning functions**

  Once the evaluations have been concluded, users can create and assign individual training packages and corresponding quiz tests, if required. Additionally, selected sessions can be defined as training sessions.

- **Executing automatic assignments**

  Random factors can be defined for the selection of sessions to be evaluated in order to exclude subjective influences.

A session can be an agent's recorded phone call or can additionally include the corresponding screen activity.

2.1 Typical workflow

In the following, you find a typical workflow which is to demonstrate the options that the application INSPIRATION*neo* offers for quality management.

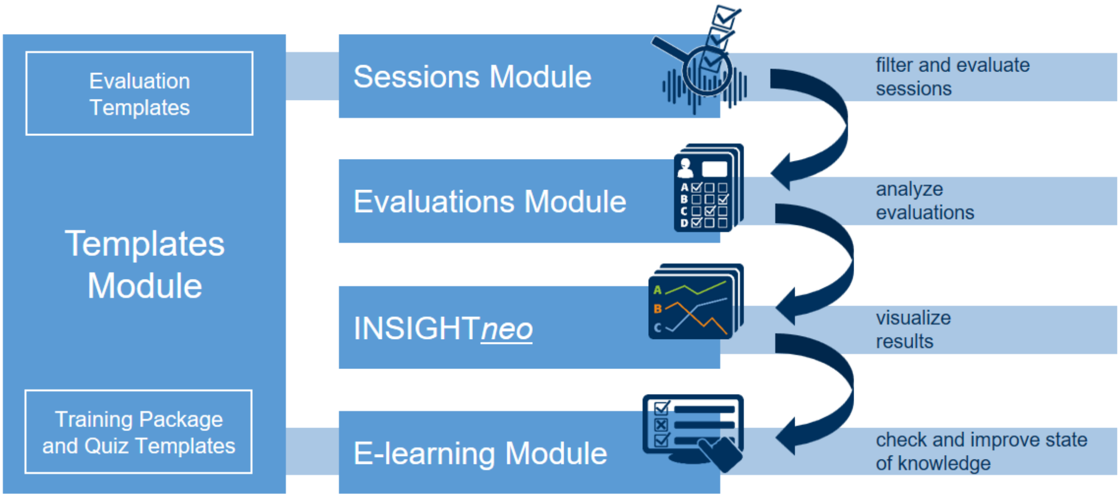


Fig. 1: Typical quality management process with INSPIRATIONneo

Furthermore, the preconditions and the settings which have to be adjusted in advance to be able to use the individual functions are described.

In the Agents module the supervisor or the team leader sees all the agents which have been assigned to him within the organization structure. Agents are assigned to organization units as their members in the application System Configuration, see administration manual *System Configuration - User management (for system providers)* and *System Configuration - User management (for tenants)*. In the tabs of the detail view, information about the agents such as their sessions and evaluations is listed. Before any evaluation can be available, evaluation templates have to be created in the Templates module which can then be used for the evaluation process.

By clicking on the icon *(Create)* in the toolbar of the main view of the submenu item Evaluation Templates module, the template generator opens allowing you to create evaluation templates and customer survey templates, see user manual *INSPIRATIONneo - Usage Templates module*. Some icons in the toolbar of the template generator do not become active before sections and question elements or groups have been saved for the template. For every new template, a rating scheme has to be selected via the icon *(Select rating scheme)* in the toolbar of the template generator. The rating schemes, e. g. based on grades or on percent values, have to be created in the Rating Schemes module of the application System Configuration beforehand, see administration manual *System Configuration - Rating Schemes Management*. Subsequently, you can add different sections by clicking on the icon *(Edit section)* which can then be filled with different elements from the element bar on the left-hand side of the template generator. It is recommendable to create separate sections for different topics or agent skills which are supposed to be evaluated separately; after all, the reporting is carried out for individual sections which thus allows more precise results.

Usually, agents are evaluated on the basis of recorded sessions to avoid an exam situation with a supervisor listening in on or even sitting next to the agent since this could distort the performance. However, agents can still be evaluated without a session. Regardless of whether an agent is evaluated without session (via the menu item *Evaluate Agents Without Sessions* in the menu *Agents* in the toolbar of the main view of the Agents module) or on basis of a session (via the icon *(Evaluate)* in the toolbar of the Sessions module), supervisors always use such an evaluation template for their evaluation so that all evaluations are accessible centrally in the application INSPIRATION*neo*.

In the Sessions module, you can click on the icon (Search) in the toolbar of the main view and define search criteria which allow you to filter for relevant sessions. A precondition is that a quality management recording plan has been created in the Recording Planner module of the application System Configuration to reveal notable sessions among the large number of recorded conversations, see administration manual *System Configuration - Recording Planner*. Select the session you would like to evaluate from the search results and carry out the evaluation on basis of the previously created evaluation template, see user manual *INSPIRATIONneo*

- *Usage Sessions module*. All completed evaluations including the used evaluation template, their status, kind of evaluation, result, etc. can be found in the Evaluations module; in addition, the detail view displays information about the corresponding sessions so that the supervisor can still trace later on why he has evaluated the agent in this way, see user manual *INSPIRATIONneo - Usage Quality Management module*. The Quality Management module contains 3 other modules besides the Evaluations module:

- the Calibrations module which allows assigning supervisors calibration sessions with the objective to establish a uniform perception of the evaluation criteria and subsequently be able to standardize and improve the evaluation basis.
- the Quality Alarms module which allows creating quality alarms which inform the supervisor if a preset threshold value has not been reached by an agent in an evaluation or in a quiz.
- the Assignments module (only in the INSPIRATION*neo* Advance solution) which allows supervisors to request random sessions of a selected agent to be evaluated.

Once several evaluations have been completed, they can be used as the basis for creating reports in the application INSIGHT*neo*.

The application INSIGHT*neo* is divided into 4 modules which provide certain sub-functions. The procedure for the creation of a report looks as follows:

1. Importing a template into the Report Templates module either in form of a default system report template provided within the system or in form of a customer-specific report template.
2. Selecting the report template and specifying the report which is supposed to be generated (parameter values, execution date, visibility etc.) in the Report Instances module.
3. Displaying the generated report in the Reports module.
4. Displaying of the generated dashboard widget in the Dashboards module.

Evaluations for which an agent feedback has been activated in the Evaluation Templates module are not considered in the reporting unless the agent has agreed with them. Users can select default reports which are already available for import in INSPIRATION*neo*. In addition, users define how often a report is supposed to be created automatically and whether it is supposed to be a static or a dynamic report. While static reports are created once, dynamic reports are adapted to the current database with every request. Furthermore, the reports can be sent to internal users as well as to users outside INSPIRATION*neo*. Therefore, the Reports module is the main tool to be informed about the latest trends and events which is of interest not only to the contact center but to the company in general, see user manual *INSIGHTneo - Usage Reports module*.

If the created reports reveal deficits on part of the agent, INSPIRATION*neo* Advanced includes the E-Learning module to train agents individually and eradicate possible deficiencies. The E-Learning module contains the Training Packages module, the Quiz module, and the Coaching Advisor module. These three modules are geared towards training agents in a target-oriented way, verifying the training success by means of quizzes as well as increasing the agents' skills and knowledge in coaching and training sessions thus offering efficient on-the-job training. Coaching sessions are exemplary call scenarios between agents which have been recorded for coaching purposes and can be exchanged among the agents. The precondition is that the participating agents have been granted the right Coaching Advisor. Training sessions are actual call scenarios which have been tagged to be used for training purposes. Agents are created in the application System Configuration, see administration manual *System Configuration - User management (for tenants)*. The training completes the quality management process.

The Audio Analysis module serves to filter for contextually relevant sessions and supports the user in creating, activating, and administrating audio analysis jobs as well as analysis lists and synonym lists. The module thus integrates the audio analysis completely into INSPIRATION*neo* eliminating the need to change to another application. In general, 3 audio analysis technologies are available:

- Keyword spotting and phrase spotting: Keyword spotting filters for relevant sessions by searching for previously defined expressions in the sessions. Keyword spotting is an adequate approach to filter calls according to their topics or to have them categorized automatically. In addition, the results are more precise than with the two other approaches.
- Emotion detection: Being able to detect certain emotions such as anger in a call can be interesting since calls with annoyed and upset customers or agents can be singled out. Such calls should always be analyzed in order to train agents for these scenarios and stop customers from turning to competitors.
- Transcription: Transcription converts recorded calls into written text which can then be used for free-text searches, causal analyses, and other analytic methods (e. g. data mining).

For information about this module refer to the user manual *INSPIRATIONneo - Usage Audio Analysis module*.

3 Background

Increasing the customer satisfaction becomes more and more important for many companies. To be able to provide the best possible service for customers, contact center infrastructures are built up or external service providers are authorized to manage the customer contacts.

The contact center is the central node in a company where all customer contacts are handled. It is the most efficient interface for the interaction with the customers. With competitors being only one phone call or one mouse click away, the appropriate and intelligent management of the contact centers becomes crucial for the success of a company, if the company wants to survive in the extremely competitive business world.

There are different customer relationship tools available which support the agents in the contact center in supplying customers with the information they need in a timely manner. Due to the reduced times of call processing which allow the contact center agents to accept more calls in a certain period of time, these quantitative measuring tools efficiently put a focus on the aspect of productivity.

The truly significant costs in contact centers are hidden, though, and bear the incalculable risk of losing customers to competitors. If agents do not meet the customers' wishes, customers may be tempted to turn to a competitor instead. Therefore, a broad training for the agents is essential in order to gain excellent product knowledge as well as communicative skills. The risk of losing customers is much higher if the agent working on the case is not motivated and not trained sufficiently.

The improvement of quality becomes one of the main tasks for all companies with an in-house or external contact center. Software solutions have been developed to measure the overall quality of contact centers and their agents. Supervisors and quality managers get the possibility to use a quality monitoring solution to determine the training necessity of the agents.

Quality monitoring in contact centers implies monitoring the interaction of the agents with the customers. Additionally, you can monitor and evaluate screen activities of the agent. User-defined solutions can be integrated to add customer data to the phone call such as credit card number, telephone number or other business-related data.

The quality monitoring solution INSPIRATION*neo* of ASC enables the user to evaluate the strong as well as the weak points of the agents in a contact center and in addition offers the possibility to measure the performances and results. All calls and screen activities can be evaluated live (silent monitoring) or recorded and archived to analyze them later which is what most contact centers prefer. This saves supervisors lots of time. You can filter for relevant calls to be evaluated, for example calls which last very long or include alarming keywords such as “cancellation”. Not only can significantly more relevant calls be filtered out which leads to representative results, but in addition users can concentrate on critical calls which allows them to reveal and tap optimization potential more quickly.

4 Advantages of quality monitoring

Customers, agents, supervisors, and the entire company benefit from quality monitoring.

Advantages for the customer:

- Competent and fast service
- Loyalty to the manufacturer
- Shorter queue times and quicker transfers for increased customer satisfaction

Improved service increases customer satisfaction considerably and reduces the risk of losing customers to other companies. The likeliness that customers stay with the same manufacturer rises considerably with the increased customer satisfaction.

Advantages for the agent:

In contrast to the evaluations within the automatic call distribution (ACD) which only delivers quantitative results like call duration, quality monitoring allows contact centers to analyze the agents on basis of their skills to be able to provide customers with excellent service.

- Objective evaluation

  Evaluations are made on basis of performance and not on basis of subjective opinions. Possibility to randomly select and assign calls to be evaluated.
- Possibility of self-evaluation

  Agents cannot only listen to their own calls but can also evaluate them.
- Integrity of the analysis procedure

  Agents can, for example, ask for an alternative call to be evaluated.
- Calibration

  A call can be evaluated by several independent supervisors on the same basis.
- Actively including the agent

  If agents do not consider the evaluation as fair, they can dismiss the evaluation, comment it and bring it up again for discussion. Agents can also mark specific calls to be able to discuss them with the superiors later. Additionally, agents can start a recording themselves if difficulties in the conversation arise.
- Reconstruction of past call situations

  Call and screen recordings secure that calls can be identified any time and can be made available as the basis for discussions.
- Individual training

  Efficient trainings in exactly those areas where agents need them do not only enhance the professional skills, but also increase personal motivation for further training.
- Motivation and health

  The active integration of the agents into the QM process and their individual support increases motivation, lowers the number of sick days and reduces fluctuation, especially if continuous success is established.
- Protection of privacy

  Private calls can be excluded from the recording and evaluation.

Advantages for the supervisor:

Quality monitoring solutions of ASC have a positive impact on the daily work of supervisors. Time savings and better training methods increase the productivity considerably.

- Evaluations according to own standards

With individually created templates, the evaluation can be executed precisely according to the ideas of the contact center.

- Independence of time and place

  Supervisors can search and analyze recorded calls independently of time and place without the need of themselves or the agents being present in the contact center during the evaluation.

- Representative results

  More evaluations can be made on the basis of realistic calls because the agents are no longer subject to an exam situation and the supervisors can choose the time of the evaluation freely. The results show a realistic image of the service level at the financial institution.

- Improved training methods

  The training of the agents can be based on real calls. They can be marked as best-practice or worst-practice examples anytime and be used for further training. In addition, when revealing deficits, individually created trainings and quiz tests can be assigned which support the agents promptly and according to their specific requirements.

Advantages for the contact center and the company at large:

By implementing the quality monitoring solution of ASC, the whole company benefits.

- Satisfied customers

  Well-trained and motivated agents can consult the customer competently and in a solution-oriented way and thus guarantee a higher customer satisfaction.

- Positive image

  Satisfied customers not only recommend the service, but the whole company to other customers.

- Increasing loyalty

  Customers do not only tend to end a business relationship after a bad customer experience, but according to studies, also tend to change a company although being satisfied with it. Today the customers therefore do not only have to be satisfied, but completely convinced of the company to remain loyal.

- Transparency and measurability

  The utilization of a QM software makes the service level transparent and measurable. The quality therefore cannot only be determined, but also enhanced continuously.

- Compliance

  Complying with legal requirements to avoid penalties.

- Process optimization:

  Identification of incorrect processes to optimize them and reduce costs.

- Information retrieval

  Valuable information can be gathered directly from the customer and be used, for example, to enhance a product, collect information about competitors or detect new trends.

- Reduction of fluctuation and generation of knowledge

  Contact center service providers can reduce the fluctuation rate significantly when employees are included in the QM process and are promoted personally and professionally. The motivation to actively take part in the creation of a positive customer experience increases, the number of sick days reduces and employees change their employer less frequently. Instead of investing in the training of new staff, the company can invest in building a pool of knowledge among the current staff.

5 Licenses

To provide the basic functions, the following license is required:

License name	Number	Description
INSPIRATION*neo* server	1 per server	License for the basic functions of the application INSPIRATION*neo*. The license contains 10 user licenses INSPIRATION*neo* Named Agent and 1 user license INSPIRATION*neo* Supervisor.

Tab. 1: Basic license

Enhanced functions

- E-learning functions
- Automatic assignments

To provide the advanced functions, the following license is required:

License name	Number	Description
INSPIRATION*neo* Server Advanced	1 per server	License for the basic functions and the advanced functions of the application INSPIRATION*neo* including E-Learning module and coaching advisor. The license contains 10 user licenses INSPIRATION*neo* Named Agent Advanced and 1 user license INSPIRATION*neo* Supervisor Advanced.

Tab. 2: Advanced license

User licenses

In addition to a server license, the following user licenses are required:

License name	Number	Description
INSPIRATION*neo* Named Agent	1 per user	License for agents to use INSPIRATION*neo*. With 1 *Named Agent* license, 1 namely identified agent can work on 1 workplace.
INSPIRATION*neo* Named Agent Advanced	1 per user	License for agents to use advanced functions of INSPIRATION*neo*. With 1 *Named Agent Advanced* license, 1 namely identified agent can work on 1 workplace.

Tab. 3: User license for agents

License name	Number	Description
INSPIRATION*neo* Supervisor	1 per user	License for supervisors to use INSPIRATION*neo*.
INSPIRATION*neo* Supervisor Advanced	1 per user	License for supervisors to use advanced functions of INSPIRATION*neo*.

Tab. 4: User license for supervisors

Audio analysis

Depending on the audio analysis method which is supposed to be used, the execution of the audio analysis requires one or several of the following licenses:

License name	Number	Description
Emotion Detection	1 per agent	License required for using the method *Emotion detection*.
Keyword Spotting Analytics	1 per channel	License for using the method *Keyword spotting*.
Transcription Analytics	1 per channel	License for using the method *Transcription*.
Phonetic Indexing Analytics	1 per agent	License for using the method *Phonetic search*.
Import & Export	1 per system	License for the data exchange of the audio analysis

Tab. 5: Licenses for audio analysis

You are authorized to use the application INSPIRATION*neo* in the quantity that is confirmed in the delivery papers. If all licenses are in use, every login attempt of additional users will generate an error message.

A user is defined as active INSPIRATION*neo* web session which is displayed in the browser.

6 System requirements

For basic information about the necessary hardware and software components refer to the installation manual *Installation requirements.*

6.1 Supported browsers

For the web applications, the following browsers are supported:

- Firefox version 65.x or higher
- Internet Explorer 11 - only in connection with Windows 10 Pro 64 Bit operating system
- Microsoft Edge
- Google Chrome version 72 or higher

6.2 Client hardware components

The performance of INSPIRATION*neo* depends on the performance of the used client computer.

Reference system without SCREEN*rec*

	Minimum requirements
CPU	Dual Core ≥ 2.0 GHz
RAM	≥ 4 GB
Hard disk	≥ 500 MB free disk space
Screen resolution	1280*1024 or 1680*1050

Tab. 6: Reference system without SCREENrec

Reference system with SCREEN*rec*

	Minimum requirements
CPU	Quad Core ≥ 2.0 GHz
RAM	≥ 4 GB
Hard disk	≥ 500 MB free disk space
Screen resolution	1280*1024 or 1680*1050

Tab. 7: Reference system with SCREENrec

6.3 Client software components

6.3.1 Supported software

- Citrix XenApp 7.11
- Citrix XenDesktop 7.11

6.3.2 Supported operating systems

Supported operating systems

The following operating systems are supported for clients:

- Microsoft Windows 10 Pro English - 64 Bit
  with OpenGL version > 2.1

- Microsoft Windows 10 Pro German - 64 Bit
  with OpenGL version > 2.1

Required third-party provider software

- Oracle Java SE for Business Runtime Environment, version JRE 1.8.x, 32 Bit

Java is required exclusively for the following applications:

- POWER*play* Pro
- POWER*play* Station
- SCREEN*rec*
- SCREEN*rec* audio
- SCREEN*rec* scan

7 User rights

INSPIRATION*neo* has been designed for several users and user groups. The user rights can be assigned individually, by allowing or denying a user or a group of users the access to different modules or functions. Any user rights scenario can be recreated.

After the login into INSPIRATION*neo* every user only sees the modules and functionalities which have been released for the user, according to the user right scenario defined by the administrator.

INSPIRATION*neo* additionally supports a predefined user right scenario which has been customized to the tasks of agents. As soon as a user is defined an agent by the administrator, he receives the predefined agent user rights. After logging in to INSPIRATION*neo* users have exactly those modules and functions at their disposal which they need for their job as agent. Modules and functionalities which are not needed by the agent are hidden automatically.

The assignment of user rights is done in the application System Configuration. If an adjustment of the user rights becomes necessary, contact the system administrator.

8 Start application

Start the browser and enter the URL of the application server in the address bar. Your system administrator will inform you about the URL for accessing the application.

After you have entered the URL, the following login screen is displayed.

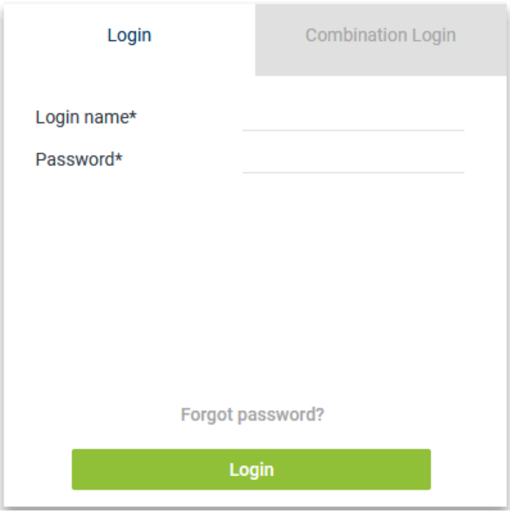


Fig. 2: Login screen

In general, there are the following login options:

- Single login = normal user login, see chapter "Single login", p. 18
- Combination login, see chapter "Combination login", p. 19.

Your system administrator will tell you which login you have to use.

8.1 Single login

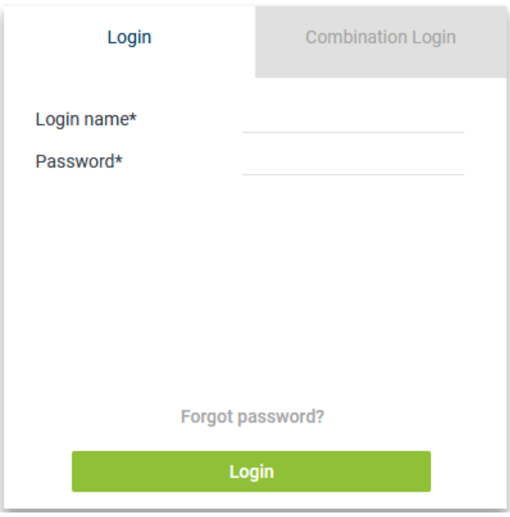


Fig. 3: Single login

1. Enter your user name and the password.
2. Click on the button -> *Login*.

⇨ The welcome screen of the application appears.

If you have forgotten your password and requested a new one upon your last login, the following window appears:

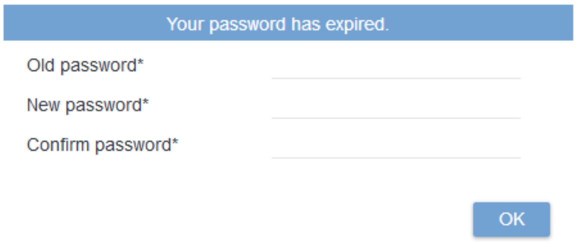


Fig. 4: Your password has expired

3. In the entry field *Old password*, enter your new password you have received by e-mail.
4. In the entry field *New password*, enter your new, modified password.
5. In the entry field *Confirm password*, repeat your new, modified password.
6. Click on the button *OK*.

   ⇨ The welcome screen of the application appears.

8.2 Combination login

For safety reasons, it may be sensible to assign a combination user to a user. That way it can be ensured for instance that a supervisor only accesses recorded conversations when a member of the work council is present.

If a combination user has been defined, the actual user is only allowed to log in when the combination user has logged in, too. If entering the login data of a combination user is required, proceed as follows:

1. In the login window, click on the button *Combination Login*.

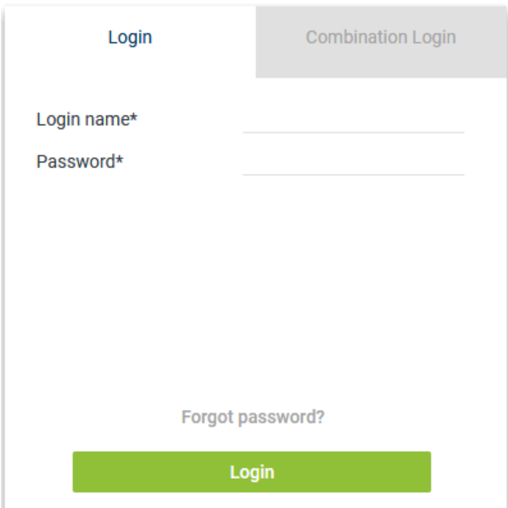


Fig. 5: Login

2. The window *Combination Login* appears.

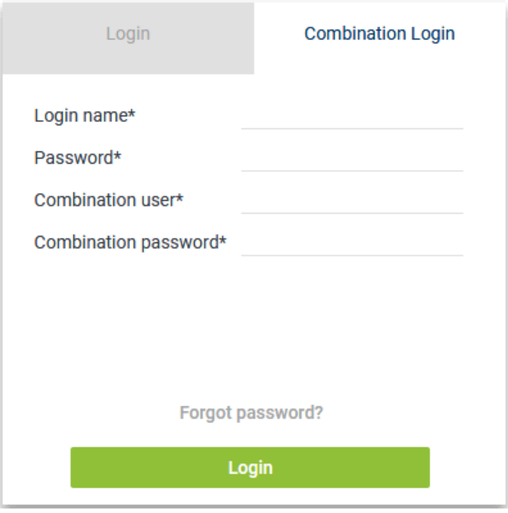


Fig. 6: Combination login

3. Enter your user name and your password as well as the user name and password of your combination user.
4. Click on the button -> *Login*.

⇨ The welcome screen of the application appears.

To change to the normal login, if required, click on the button *Login*.

If you have forgotten your password and requested a new one upon your last login, the following window appears:

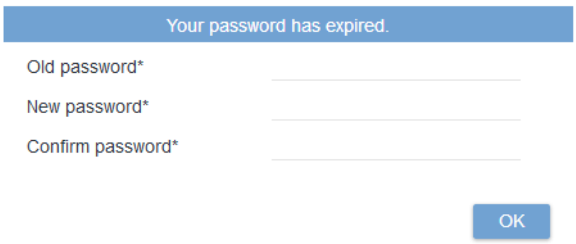


Fig. 7: Your password has expired

5. In the entry field *Old password*, enter your new password you have received by e-mail.
6. In the entry field *New password*, enter your new, modified password.
7. In the entry field *Confirm password*, repeat your new, modified password.
8. Click on the button *OK*.
   ⇨ The welcome screen of the application appears.

8.3 Request new password

If you have forgotten your password, you can request a new one via the function *Forgot password?* in the different login windows.

1. Click on the text *Forgot password?*

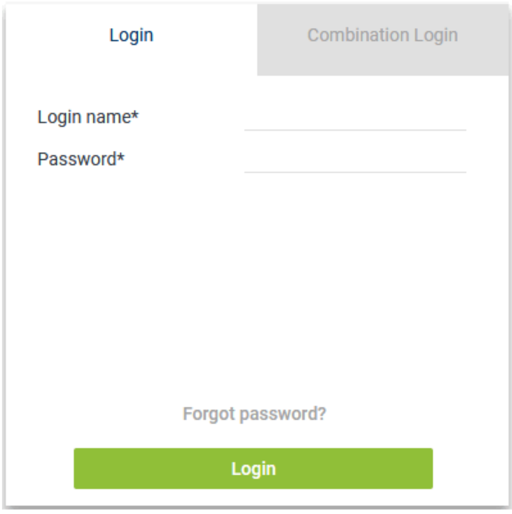


Fig. 8: Login window

2. The window *Forgot password?* appears.

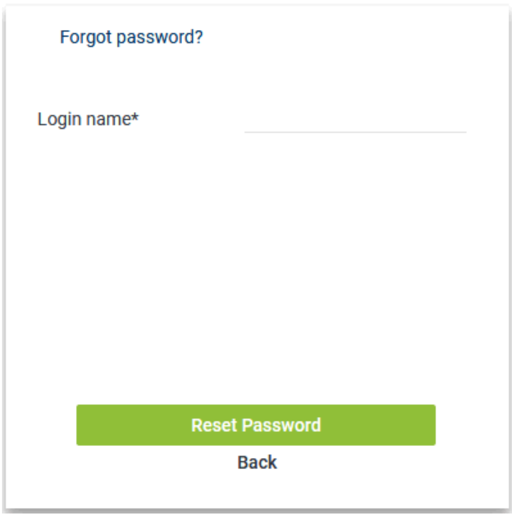


Fig. 9: Request password

3. Enter your user name.
4. Click on the button -> *Reset Password*.

   ⇨ You will receive an e-mail containing your new password.

ⓘ For this function, your administrator has to have configured a corresponding e-mail server. Contact your system administrator if you do not receive an e-mail after this step.

5. To return to the login, click on the text *Back*.

9 User interface

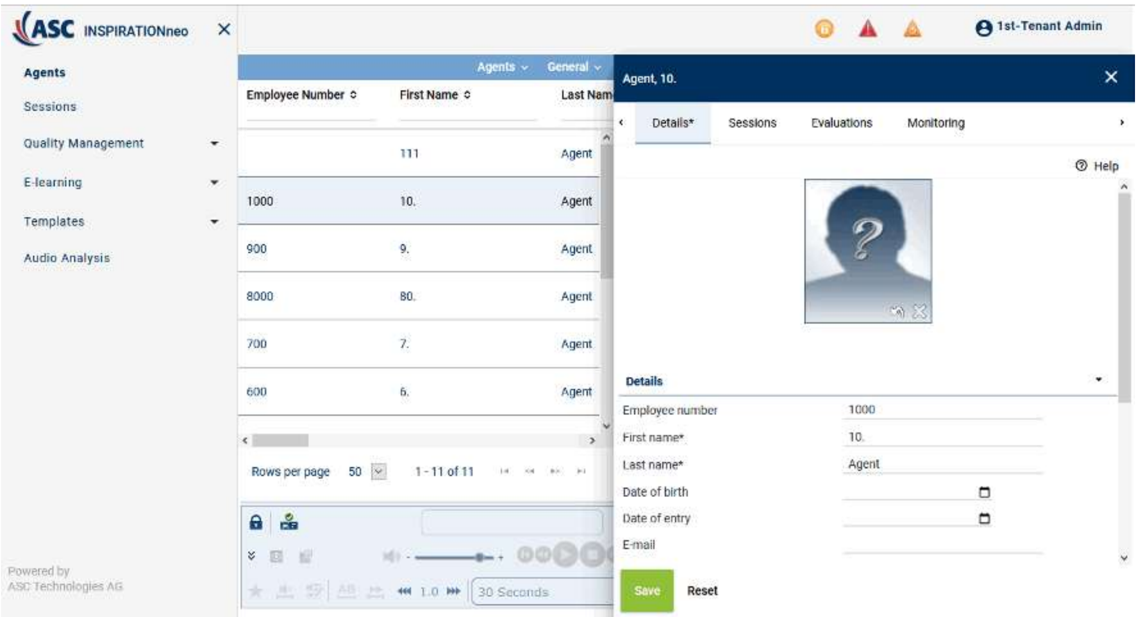


Fig. 10: Welcome screen

Navigation bar		Contains the individual menu items (function modules), see chapter "Navigation bar", p. 24.
Main view		Contains an overview of the most important information about the selected module, see Main view.
Detail view		Contains detailed information about as well as functions and setting options of the selected element of the main view, see chapter "Detail view", p. 30.
(Collapse)		Icon which allows collapsing or reducing the viewing areas.
(Expand)		Icon which allows expanding or opening the viewing areas.
Toolbar		Contains icons and menu items with functions for the elements in the main view. It depends on the selected module which icons and menu items are displayed. The separate icons and menu items are explained in the descriptions of the respective modules.
General	*Print*	Menu item which allows printing the table of the main view, see chapter "Print", p. 34.
	Adjust Table	Opens the window *Table Configuration*, see chapter "Adjust table", p. 29.
	Save Table Configuration	Saves the current table configuration, see chapter "Save table configuration", p. 30.
	Search	Opens the window *Search*, see chapter "Search", p. 35. When opening the module, a search filter is set automatically so that only data sets of the current day are displayed.
	Reset Search	Resets all manually entered search criteria. The search is started without manual filter settings.

	General Help	Via the menu item *General Help*, a description of the application you are currently viewing is opened. See chapter "Call up online help", p. 34.
	Module Help	Via the menu item *Module Help*, a description of the module you are currently viewing is opened. See chapter "Call up online help", p. 34.
		Shows the date when your password expires. To hide the icon, click on the button *Okay*.
(Your latest login has failed. Please use the correct password.)		Shows that the latest attempt to log in to the application was not successful. Click on the warning icon to delete the error message. Always use the correct password to log in to the application.
(Your last logoff was not correct. Please use the logoff button.)		Indicated that you have not logged off correctly when leaving the application the last time. Click on the warning icon to delete the error message. Always use the logoff icon to log off from the application.
(Logged in as).	*Change Password*	Menu item which allows changing your password, see chapter "Change password", p. 33.
	Change Replay Server	Menu item which allows changing the replay server, see chapter "Change replay server", p. 44.
	Navigation Bar	Menu item which allows changing the way the navigation bar is displayed, see chapter "Navigation bar", p. 24.
	Language	Menu item which allows selecting the language of the user interface, see chapter "Change language", p. 32.
	Resource String View	Menu item which allows changing between the resource string view and the default view. This view is only available ASC-internally.
	Info	Menu item which allows calling up information about the version of the ASC software, see chapter "Call up info", p. 32.
	Logoff	Menu item which allows logging off from the application.
User		Name of the logged-in user
Last login date		Shows the date of the last login.
Rows per page 50		Shows the number of rows per page In the drop-down list, select how many rows per page are supposed to be displayed. You can choose 10, 20, 50 or 100 rows per page.
Range of the displayed sets of data		Shows the range of the displayed sets of data on the current page of the main view.
		Buttons which allow browsing the pages of the main view.
Last filtered on ...; Number of records: ...		Shows the time of the last filtering (search) and the number of data sets according to the current list of search results in the main view. This information is not available in all modules.

If the session has been inactive for a longer period of time, the application is closed automatically. Default value for the timeout: 30 minutes. The value can be adjusted by the administrator, see administration manual *System Configuration - User Management*.

To close the application, always use the logoff function.
(Logged in as) > Logoff.

9.1 Navigation bar

The individual modules of the application are displayed in the navigation bar.

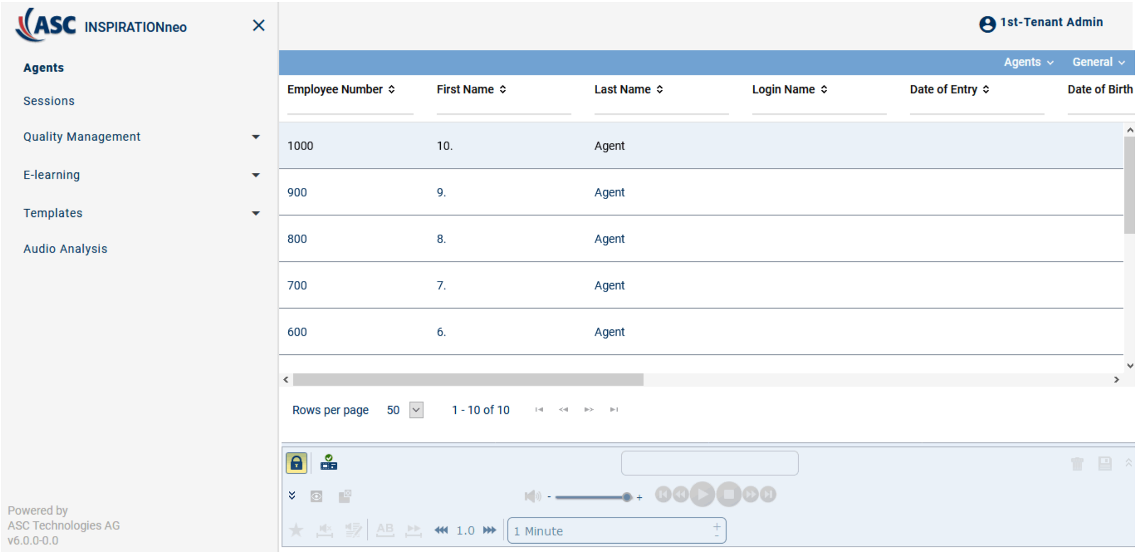


Fig. 11: Navigation bar (example)

Modules which contain sub-menus are marked with an arrow icon.

Click on the module name to display an overview including a description of all sub-menus. Click on the arrow icon to display or hide the sub-menus of a module.

You can hide the navigation bar by clicking in the icon ✕ and expand it again by clicking on the icon ≡.

9.1.1 Short description of the modules

Module name	Sub-menus	Description
Agents		• Shows agent data • Offers the possibility to change existing data • Offers the possibility to make evaluations
Sessions		• Searching and replaying recorded sessions • Evaluating and reviewing evaluations • Analyzing sessions
Quality Management		• Creating, implementing, and administrating different quality management procedures
	Evaluations	• List of all evaluations • Creating training measures • Initiating calibrations • Offers the agents the possibility to give feedbacks to the evaluations
	Calibrations	• Reviewing conspicuous evaluations and their underlying evaluation templates • Having additional supervisors re-evaluate conspicuous sessions
	Quality Alarms	• Defining and assigning quality alarms • Offers the possibility to inform users if the results of the evaluations or of quiz tests are below a certain threshold value.
	Assignments	• Offers the possibility to randomly assign sessions to a supervisor for evaluation
E-Learning		• Compiling and assigning learning content and quiz tests to train the agents
	Training Packages	• Administrating training packages • Assigning training packages to provide learning content for the agent training • Offers agents the possibility to accept and finalize training packages
	Quiz	• Administrating quiz tests • Assigning quiz tests to review learning content of training packages • Offers agents the possibility to accept and finalize quiz tests packages
	Coaching Advisor	• List of training sessions • List of coaching sessions
Templates		• Creating and administrating templates
	Evaluation Templates	• Creating templates which serve as the basis for evaluations

Module name	Sub-menus	Description
	Training Package Templates	• Creating templates which serve as the basis for training packages
	Quiz Templates	• Creating templates which serve as basis for quiz templates for the different training packages
Audio Analysis		• Creating and administrating audio analysis jobs • Searching for keywords, emotions or patterns in recorded sessions • Turning audio data into text

Tab. 8: Module descriptions

It depends on your function rights which of the described modules are available.

9.2 Main view

The main view offers an overview of the data administrated in the module.

The content of the main view depends on the selected module. A description of the module-specific content can be found in the manual of the respective module.

In general, the main view consists of a table which contains the data sets of the selected module.

In the most modules, you can change the sort sequence and order of the columns arbitrarily, see chapter "Change sort sequence", p. 27 and chapter "Adjust table", p. 29. In these modules, you can adjust the column width by clicking on the right margin of the field containing the column headline, holding the mouse key down, and dragging the column to the required width.

In addition, the main view contains a toolbar with all functions which can be used for the elements of the main view. The different toolbars are explained in the descriptions of the respective modules.

At the bottom edge of the main view, most modules offer buttons which allow you to browse the pages of the main view and indicate which page you are on.

Fig. 12: Changing pages

	Jumps to the first page of the main view.
	Jumps to the previous page of the main view.
51 - 100 of 298	Shows the range of the displayed sets of data on the current page of the main view.
	Jumps to the next page of the main view.
	Jumps to the last page of the main view.

In other modules, you can navigate through the main view by means of the scrollbars.

9.2.1 Change sort sequence

In their column headlines, some tables contain arrows which indicate the sort sequence and which allow you to change the sort sequence:

	No sorting
	Descending sort sequence
	Ascending sort sequence

Tab. 9: Main view - change sort sequence

To change the sort sequence of the table, click on the arrow in the column headline you would like to sort the table by.

9.2.2 Filter table view

Below their column headlines, some tables contain fields which allow you to filter the table entries.

Fig. 13: Filter table view (example)

1. If you would like to filter only the content of one individual column, enter the character string you would like to filter by in the filter field of this column.
   ⇨ The table only displays the entries in this column which contain the entered character string.

Example:

You would like to display only employees whose employee ID starts with the digits *95*; consequently you enter the numerical sequence *95* in the filter field of the column *Employee ID*:

Fig. 14: Filter table view - 1 criterion

2. If you would like to filter the content of several columns at the same time, enter the character string you would like to filter by in all the filter fields of these columns.
   ⇨ The table only displays the entries which match all entered filter criteria.

Example:

You would like to display only employees whose employee ID starts with the digits *95* and whose last name begins with the letter *H*; consequently you enter the numerical sequence *95* in the filter field of the column *Employee ID* and the character *H* in the filter field of the column *Last name*:

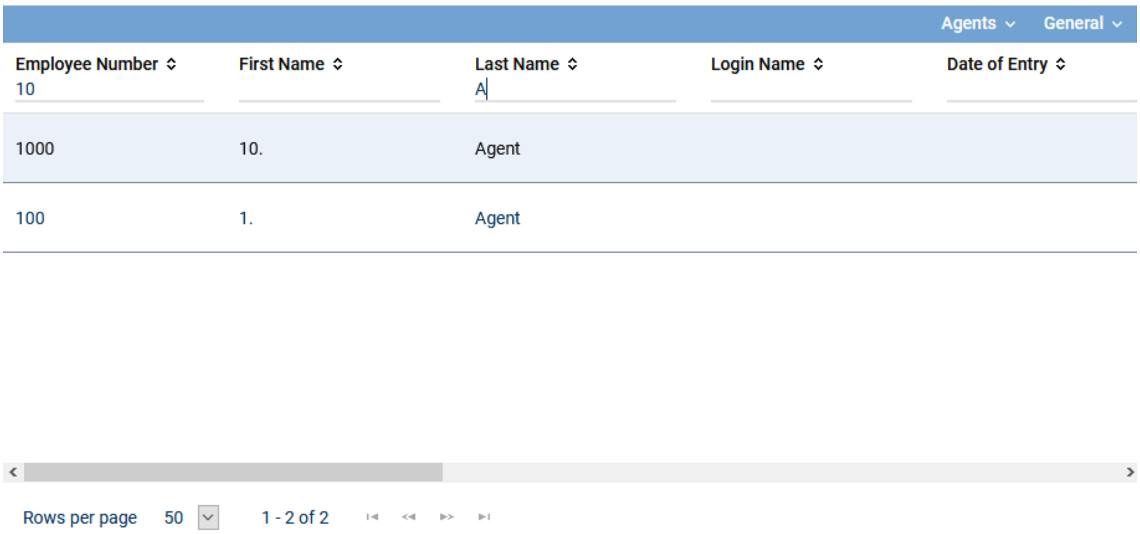


Fig. 15: Filter table view - several criteria

9.2.3 Adjust table

This function allows adjusting the order of the columns in the table of the main view.

1. Click on the menu item *General* > *Adjust Table* in the toolbar of the main view.
   ⇨ The window *Table Configuration* appears.

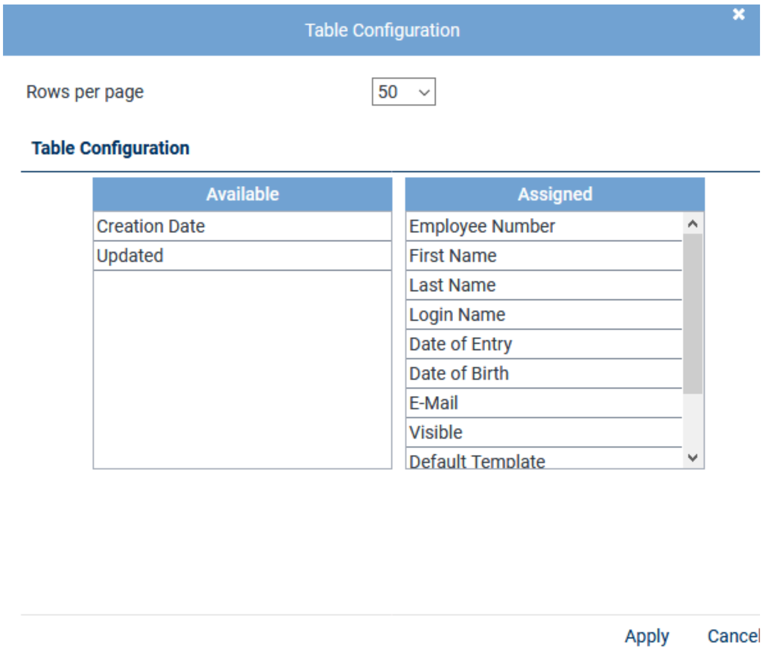


Fig. 16: Adjust table of the main view (example)

The different columns can be moved within a list or from one list to the other by dragging them to and dropping them in the required position. Double-clicking on one column moves the column to the end of the opposite list.

The following functions are available:

Rows per page 50	Number of rows per page.
Default	Resets the configuration in the window *Table Configuration* to the default settings and closes the window.
Apply	Saves all changes and closes the window *Table Configuration*.
×	Closes the window *Table Configuration* without applying the changes.

In the list *Available*, all columns which are currently not used are displayed. In the list *Assigned*, all columns used in the main view are displayed. The entries arranged from top to bottom correspond to the columns arranged from left to right in the main view.

2. Configure the column view according to your requirements.
3. In the drop-down list, select how many rows per page are supposed to be displayed.
   ⇨ You can choose 10, 20, 50 or 100 rows per page.
4. To apply the changes in the current view, click on the button *Apply*.
   To discard the changes and close the window, click on the icon ×.

9.2.3.1 Change column width of the table

To change the column width of the table in the main view individually, proceed as follows:

1. Left-click on the column of the header, hold the mouse key down, and drag the column to the respective width.

9.2.4 Save table configuration

1. To save the table configuration, click on the menu item *General* > *Save Table Configuration* in the toolbar of the main view.

⇨ The table will be displayed in the saved layout in the future.

> The changes made only apply for the logged-in user. They are a matter of personal settings.

9.3 Detail view

The detail view contains detailed information about as well as functions and setting options of the selected element of the main view.

The content of the detail view depends on the selected module. A description of the module-specific content can be found in the manual of the respective module.

The different detail views may be divided in tabs and group fields.

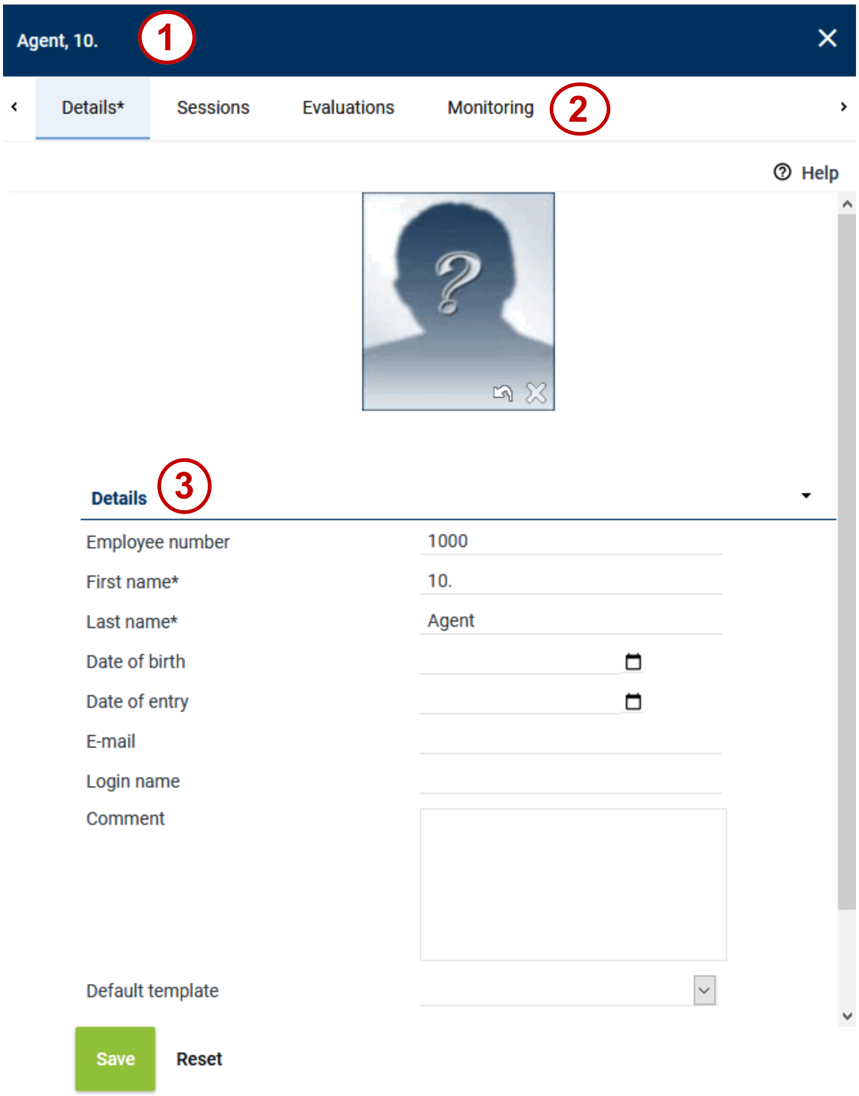


Fig. 17: Detail view (example)

1	Description of the selected element
2	Tabs
3	Group field

To change tabs, click on the tab you would like to display.

To open a group field, click on the arrow next to the name of the group field.
To hide a group field, click on the arrow next to the name of the group field.

When making changes, you can change tabs without buffering without risking the loss of the changes you have made.

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

To save changes, click on the button *Save*.
To discard the changes which have not yet been saved, click on the button *Reset*.

9.3.1 Text entry fields

There are 2 different fields for text entries:

Single-row entry fields

Maximum text length: 255 characters

Fig. 18: Single-row entry field (example)

Multi-row entry fields

Maximum text length: 1500 characters

Fig. 19: Multi-row entry field (example)

10 General functionalities

The functionalities described below are available in general or in most modules.

10.1 Change language

1. Click on the menu item *Logged in as* > *Language* in the top right corner of the user interface.

   ⇨ The following window appears:

Fig. 20: Change language

2. Select the language from the drop-down list. Only languages that you have installed during the installation can be selected.

   ⇨ The texts of the user interface are displayed in the selected language.

10.2 Call up info

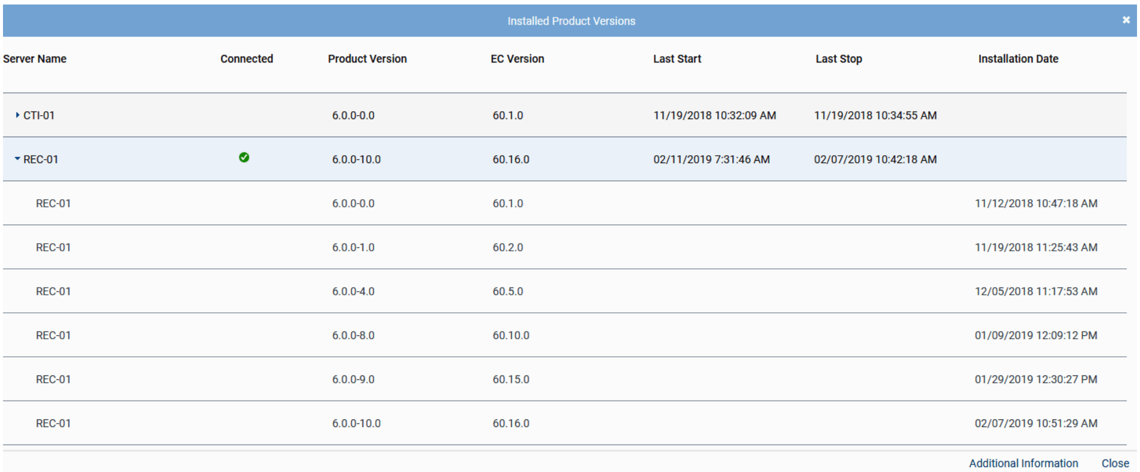
1. Click on the menu item *Logged in as* > *Info* in the top right corner of the user interface.

⇨ The window *Installed Product Versions* appears. It contains information about the version of the *neo* software.

The following information is displayed:

Column Name	Description
Server Name	Name of the server. Click on the arrow to display the history. In the history, the servers have been sorted by installation date beginning at the top with the first installation date.
Connected	The icon indicates that the core is used in the current application.
Product Version	Information about the current product version
EC Version	Information about the current Enterprise Core version
Last Start	Date and time of the last system start
Last Stop	Date and time of the last system stop
Installation Date	Date and time of the installation Click on the arrow in the column *Server Name* to display the information.

Tab. 10: Information



Installed Product Versions

Server Name	Connected	Product Version	EC Version	Last Start	Last Stop	Installation Date
▸ CTI-01		6.0.0-0.0	60.1.0	11/19/2018 10:32:09 AM	11/19/2018 10:34:55 AM	
▾ REC-01	✔	6.0.0-10.0	60.16.0	02/11/2019 7:31:46 AM	02/07/2019 10:42:18 AM	
REC-01		6.0.0-0.0	60.1.0			11/12/2018 10:47:18 AM
REC-01		6.0.0-1.0	60.2.0			11/19/2018 11:25:43 AM
REC-01		6.0.0-4.0	60.5.0			12/05/2018 11:17:53 AM
REC-01		6.0.0-8.0	60.10.0			01/09/2019 12:09:12 PM
REC-01		6.0.0-9.0	60.15.0			01/29/2019 12:30:27 PM
REC-01		6.0.0-10.0	60.16.0			02/07/2019 10:51:29 AM

Additional Information Close

Fig. 21: Installed Product Versions

2. To obtain additional information about the system, click on the button Additional Information in the bottom right corner of the window.

⇨ The window *Additional Information* appears. It contains information about the license.

Fig. 22: Additional Information

10.3 Change password

If you use the function *Last Call Repeat*, the password must consists of numbers only.

1. Click on the menu item *Logged in as* > *Change Password* in the top right corner of the user interface.

   ⇨ The following window appears:

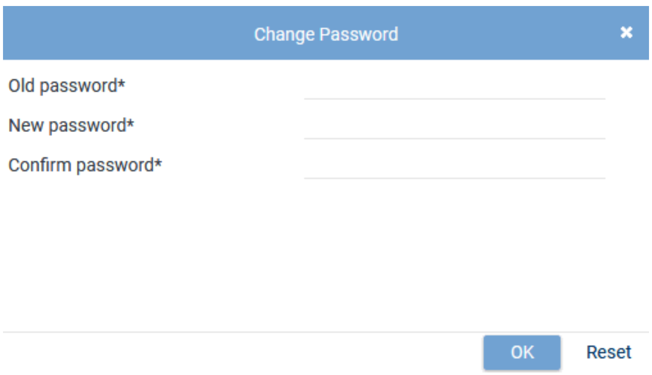


Fig. 23: Change password

2. Enter your old password.
3. Enter your new password and confirm it.
4. To save the change of the password, click on the button *OK*.
   To delete the entries without saving them, click on the button *Reset*.
   To cancel the change of the password, click on the icon ✖ in the top right corner of the window.

Once you have successfully saved the changed password, you have to enter the new password upon opening the application the next time.

10.4 Change navigation bar

1. Click on the menu item *(Logged in as)* > *Navigation Bar* in the top right corner of the user interface.

   ⇨ The window *Change Navigation Bar* appears.

2. Activate the check box to collapse the navigation bar.

⇨ The setting is saved permanently. Upon logging in the next time, the application is opened with this settings.

You can expand the navigation bar again by clicking on the icon ≡ (Expand) in the top left corner.

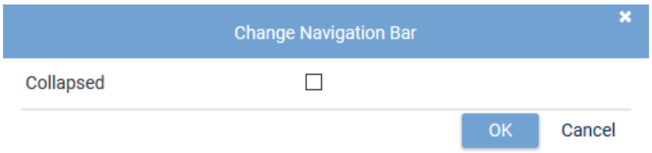


Fig. 24: Change navigation bar

10.5 Call up online help

An online help is available at different locations in the system. You can call up the online help as follows:

Menu item / Button	Location	Result
General	Toolbar of the main view	Select whether you would like to open the *General Help* or the *Module Help*.
Help	Detail view / Additional window	A topic-specific help opens referring to the tab or the additional window you are currently viewing.

Tab. 11: Call up online help

By clicking on the menu item *General*, you can select one of the following options:

General Help	The help about the general functions of the application is opened.
Module Help	A description of the module you are currently viewing opens.

There are the following options to navigate in the online help:

- Navigation bar on the left of the window
- Contents (via the menu item *Contents* in the header)
- Cross reference to additional information at the bottom of the page

10.6 Print

This function allows printing the table of the main view.

✓ Print default in the browser under *File* > *Page Setup*: Page orientation has been set to landscape.

✓ Additionally when using the browser Mozilla Firefox:
Print default in the browser under *File* > *Page Setup*: Scaling has been set to 110 %.

1. In the menu *General* of the toolbar, click on the menu item *Print*.
   ⇨ The print preview appears.
2. To cancel the printing process, click on the button *Cancel*.
   To continue the printing process, click on the button *Print*.
   ⇨ The window *Print* appears.

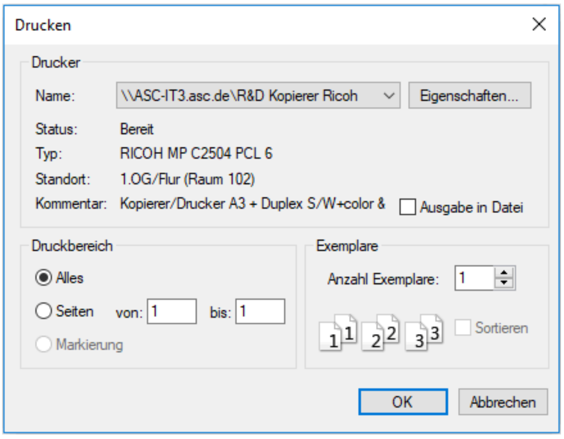


Fig. 25: Print (example)

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

10.7 Search

The function *Search* allows search for selected criteria systematically. Every search query can be saved to be used again.

> The icon is displayed whenever the search has been adjusted by means of a filter.

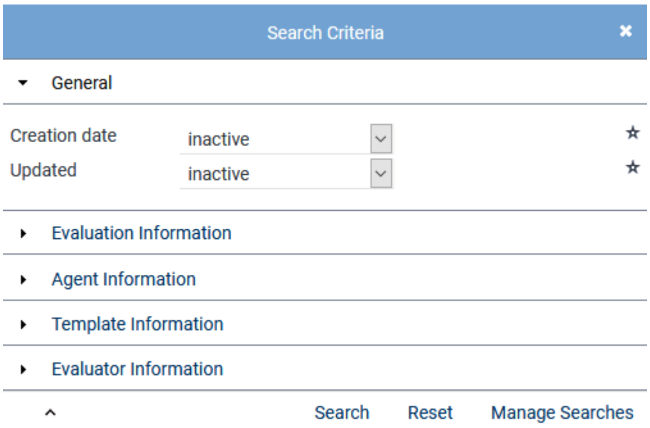


Fig. 26: Search Criteria (example)

The following functions are available:

▸	Shows the content of the search category.
▾	Hides the content of the search category.
☆	Adds the search criterion to the list of favorites.
★	Removes the search criterion from the list of favorites.
⌃	Hides the content of the window.
⌄	Shows the content of the window.

Search	Starts the search.
Reset	Resets all manually entered search criteria.
Manage Searches	Enables you to save and load search procedures.
	Closes the window *Search Criterion*.

10.7.1 Search criteria

For the search, different search criteria are available which are divided in several search categories. It depends on the respective module which search criteria are available.

For all search criteria, you can select different comparison parameters from a drop-down list. In general, the following comparison parameters are available:

inactive	The search criterion is ignored for the search.
between	A search is made for all objects within the entered range. The initial and the final values are included in the search result.
Period (indiv.)	A search is made for all objects in the selected period of time. In the entry field, enter the period in the following format: *month-days-hours-minutes*. As an example, the entry *03-05-15-20* means that a search is made for conversations from the last 3 months, 5 days, 15 hours, and 20 minutes.
Period	A search is made for all objects in the selected period of time.
equal	A search is made for all objects which exactly match the entered value.
not equal	A search is made for all objects which do not match the entered value.
greater or equal	A search is made for all objects the value of which is greater than or equal to the entered value.
greater than	A search is made for all objects the value of which is greater than the entered value.
smaller or equal	A search is made for all objects the value of which is smaller than or equal to the entered value.
smaller than	A search is made for all objects the value of which is smaller than the entered value.
starts with	A search is made for all objects which start with the entered value.
doesn't start with	A search is made for all objects which do not start with the entered value.
ends with	A search is made for all objects which end with the entered value.
doesn't end with	A search is made for all objects which do not end with the entered value.
contains	A search is made for all objects which contain the entered value.
doesn't contain	A search is made for all objects which do not contain the entered value.
in	One or several values are entered which are supposed to be searched for. The search displays all entries which match one of these values.
not in	One or several values are entered which are supposed to be searched for. The search displays all entries which do not match one of these values.

Depending on the search criterion, there are different options to enter or select comparison values:

- If only one entry field is displayed, enter the value directly into the entry field via the keyboard.

- If a drop-down list is displayed, select the value from the drop-down list.
- If a rotating field is displayed, click on one of the arrows to increase or decrease the value.
- If several values can be entered, enter the value directly in the entry field via the keyboard and click on the icon + on the right of the entry field.
  To remove a value from the list, click on the icon x on the right of the value.
- If different values are displayed in combination with a check box, select a value by marking the respective check box.
- If entering a date is required, enter the date directly via the keyboard or via the icon .

10.7.2 Run a search

1. Click on the menu item *General* > *Search* in the toolbar.
   ⇨ If no saved searches exist, the window *Search Criteria* appears directly, see Fig. 28, p. 37.
   ⇨ If saved searches exist, the window *Search* appears.

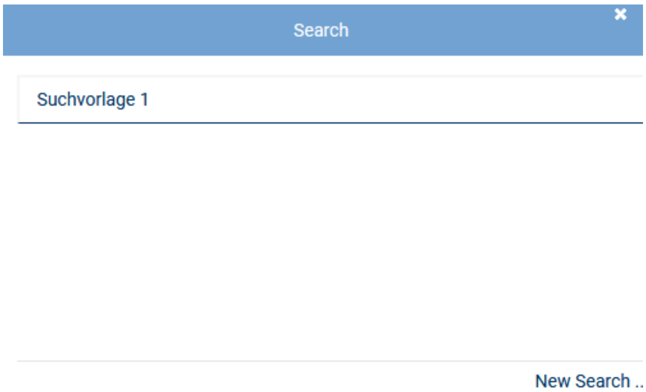


Fig. 27: Window Search (example)

2. If you would like to use one of the saved searches, click on the line with the name of the saved search.
   ⇨ The search is initiated directly.
   ⇨ The found results are displayed in the main view.
3. If you do not want to use a saved search but define new search criteria instead, click on the button *New Search*.
   ⇨ The window *Search Criteria* appears.

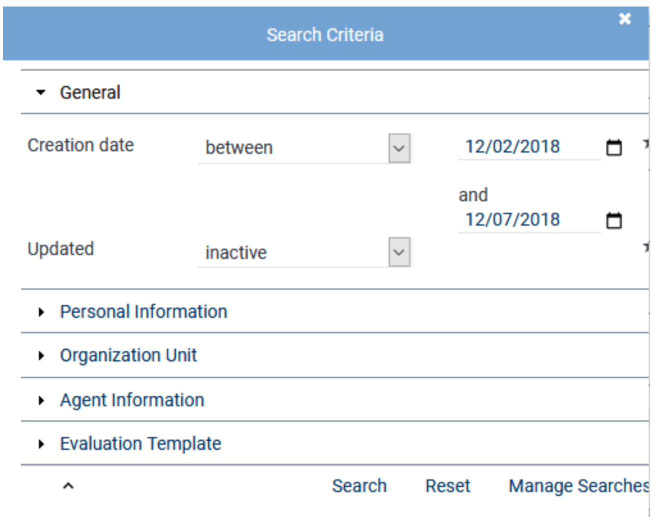


Fig. 28: Window Search Criteria (example)

4. Set the respective search criteria, see chapter "Search criteria", p. 36.
5. Click on the button *Search*.
   ⇨ The found results are displayed in the main view.
6. To save the set search criteria, click on the button *Manage Searches* > menu item *Save as...*, see chapter "Save search", p. 38.
   To reset all manually entered search criteria, click on the button *Reset*.
   To close the window *Search Criteria*, click on the icon ✖.

10.7.3 Save search

You can save previously defined search settings.

The names of the saved search settings are displayed directly upon calling up the search function, see chapter "Run a search", p. 37.

1. Set the respective search criteria, see chapter "Search criteria", p. 36.

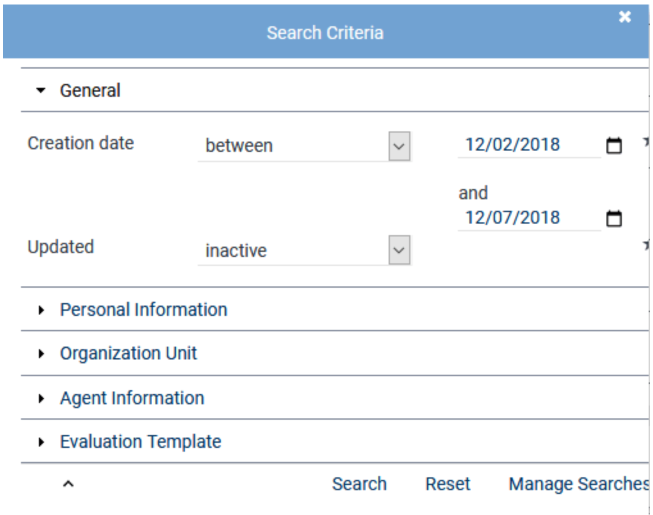


Fig. 29: Enter search criteria (example)

2. Click on the button *Manage Searches* > menu item *Save as...*.
3. Enter a name for the search in the entry field *Name*.

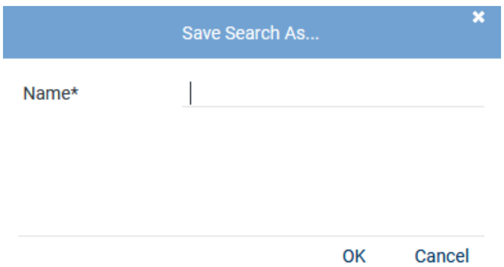


Fig. 30: Save search

4. To save the search, click on the button *OK*.
   To cancel the saving process, click on the button *Cancel*.

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

10.7.4 Edit saved search

1. Click on the menu item *General* > *Search* in the toolbar.
   ⇨ The window *Search* appears.

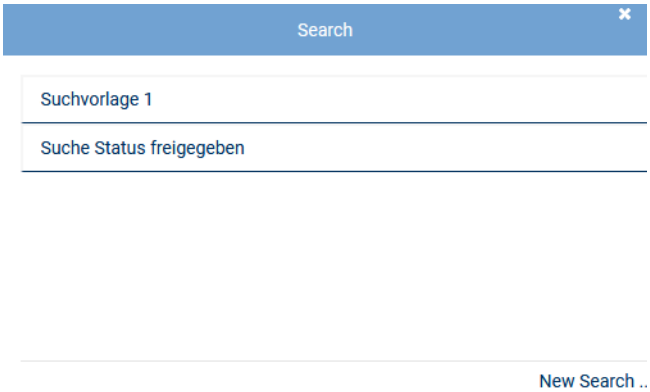


Fig. 31: Window Search (example)

2. Click on the button *New Search*.

   ⇨ The window *Search Criteria* appears.

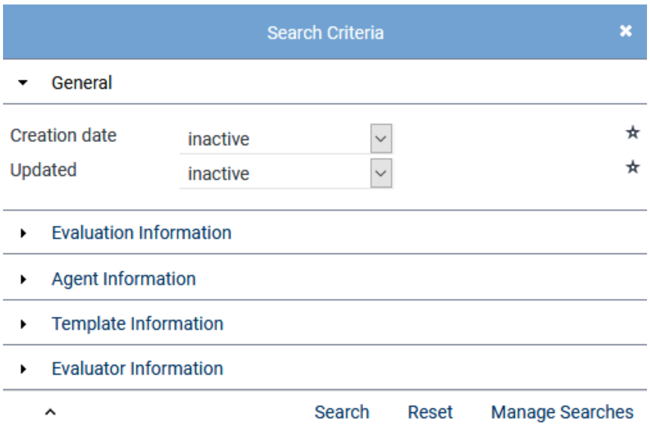


Fig. 32: Window Search Criteria (example)

3. Click on the button *Manage Searches* > menu item *Saved Searches*.

   ⇨ The window *Saved Searches* appears.

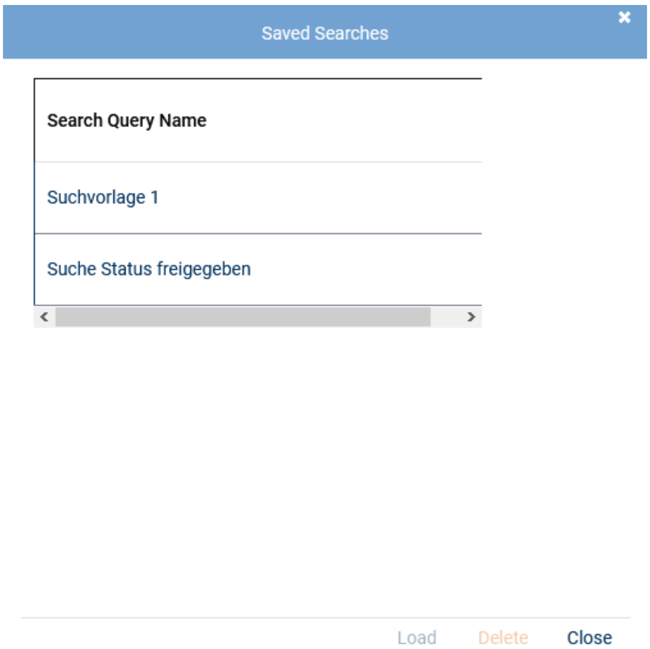


Fig. 33: Saved Searches (example)

4. Select the saved search you would like to edit.

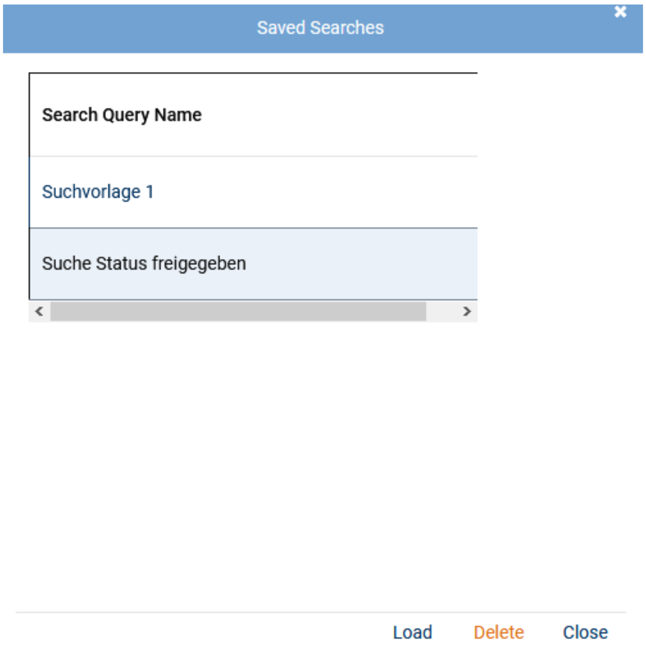


Fig. 34: Edit saved search (example)

5. Click on the button *Load*.
   ⇨ The saved search settings are loaded in the window *Search Criteria*.

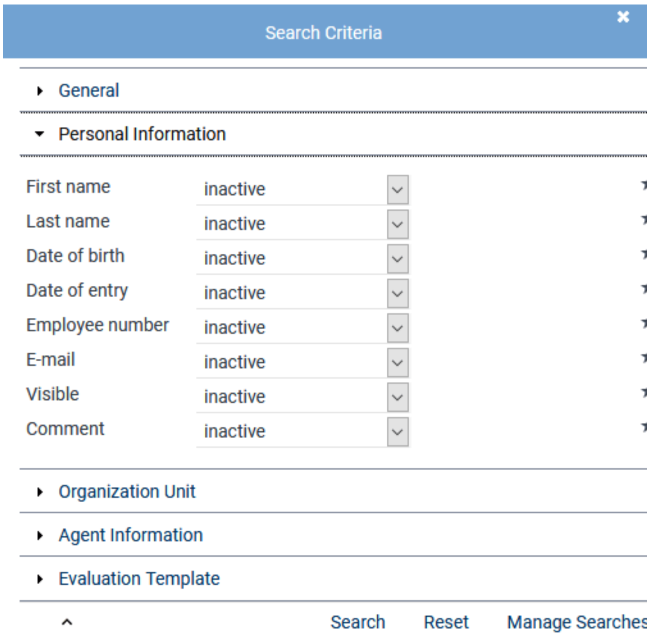


Fig. 35: Search Criteria (example)

6. Adjust the search criteria according to your requirements.
7. To save the edited search under the same name, click on the button *Manage Searches* > menu item *Save*.
   To save the edited search under a different name, click on the button *Manage Searches* > menu item *Save as...*, see chapter "Save search", p. 38.

10.7.5 Search via saved search

If you have saved search settings (see chapter "Save search", p. 38), you can quickly search for the saved search criteria.

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

⇨ The window *Search* appears.

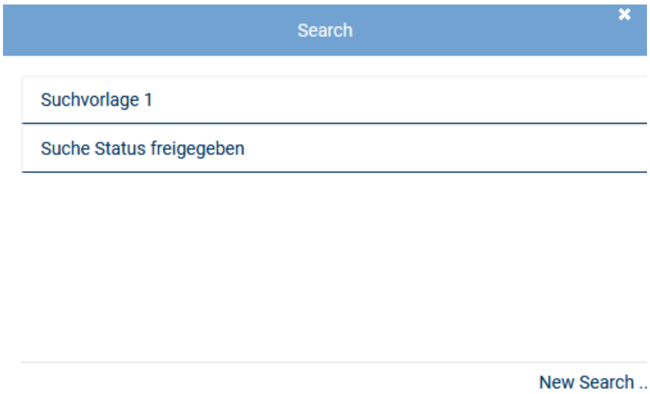


Fig. 36: Search (example)

2. Click on the name of the saved search you would like to use for the search.

   ⇨ The found results are displayed in the main view.

10.7.6 Delete saved search

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

   ⇨ The window *Search* appears.

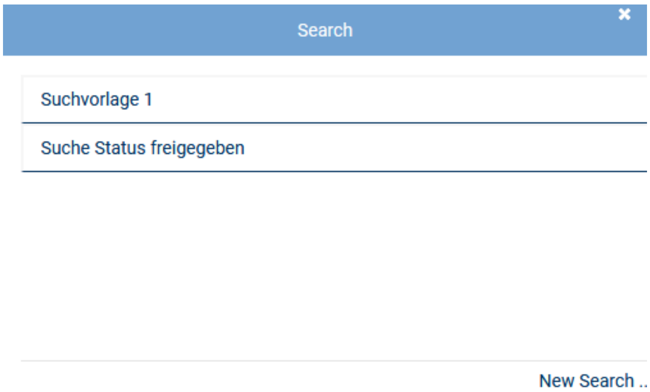


Fig. 37: Window Search (example)

2. Click on the button *New Search*.

   ⇨ The window *Search Criteria* appears.

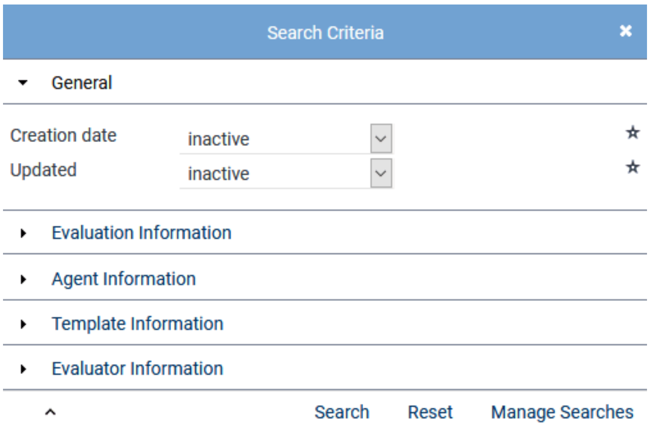


Fig. 38: Window Search Criteria (example)

3. Click on the button *Manage Searches* > menu item *Saved Searches*.

   ⇨ The window *Saved Searches* appears.

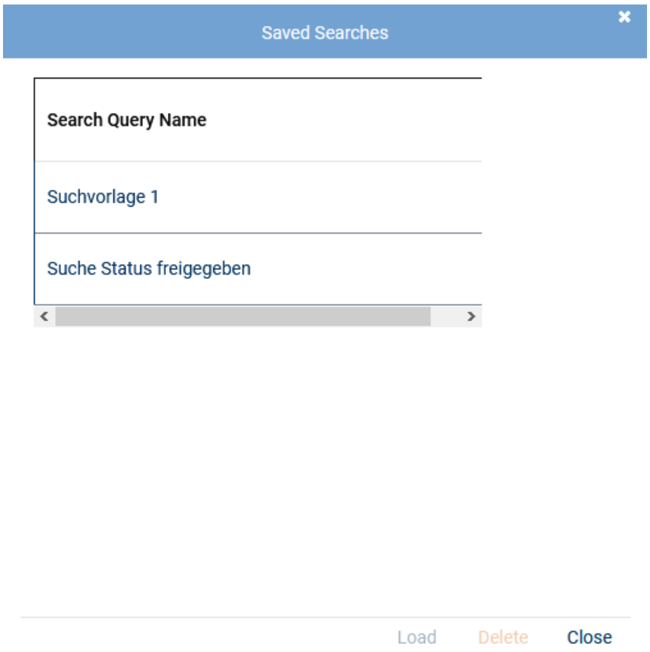


Fig. 39: Saved Searches (example)

4. Select the search you would like to delete.

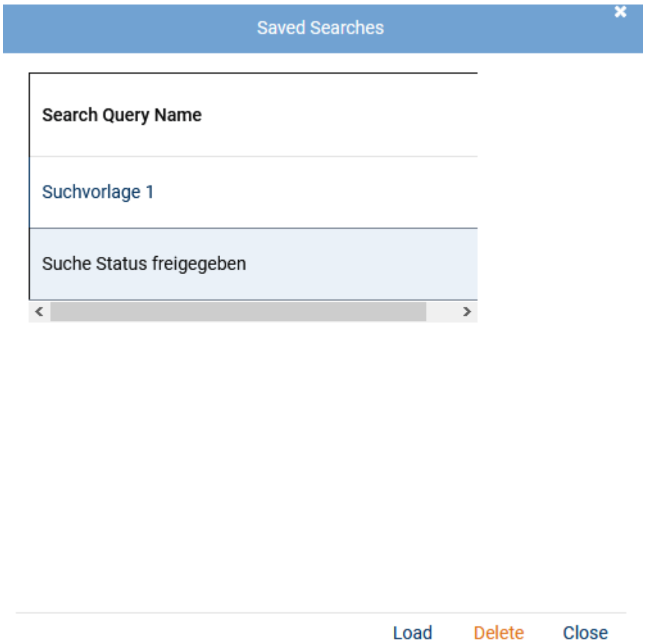


Fig. 40: Delete saved search (example)

5. Click on the button *Delete*.
6. To really delete the search, confirm the security prompt.

10.7.7 Create search favorite

You can tag individual search criteria as favorites. Search favorites are displayed additionally in the upper area of the window *Search Criteria* and thus continue to be visible even if all criteria areas have been closed.

1. Click on the menu item *General* > *Search* in the toolbar.
   ⇨ If no saved searches exist, the window *Search Criteria* appears.

⇨ If saved searches exist, the window *Search* appears.
Open a saved search, see Edit saved search, or open the window *Search Criteria* by clicking on the button *New Search*.

2. Set the respective search criteria, see chapter "Search criteria", p. 36.

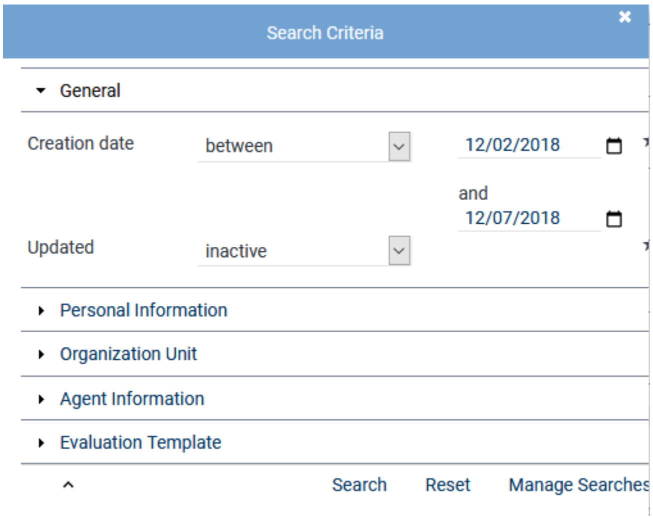


Fig. 41: Enter search criteria (example)

3. To tag one criterion as favorite, click on the icon ☆ .

⇨ The criterion tagged as favorite is displayed additionally in the upper area of the window and marked with the icon ★ .

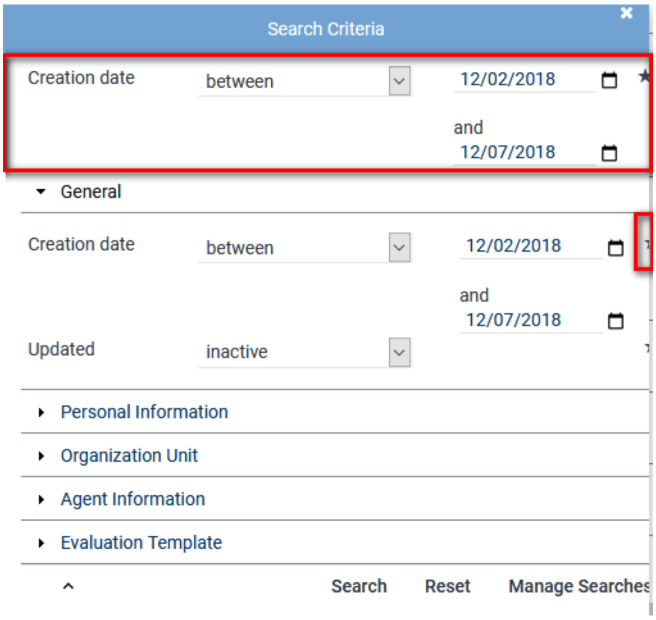


Fig. 42: Search criterion tagged as favorite (example)

4. If you do not want to use a criterion tagged as favorite as a favorite anymore, click on the icon ★ .

⇨ The criterion which is now no longer tagged as favorite is marked with the icon ☆ .

⇨ The criterion is no longer displayed in the upper area of the window.

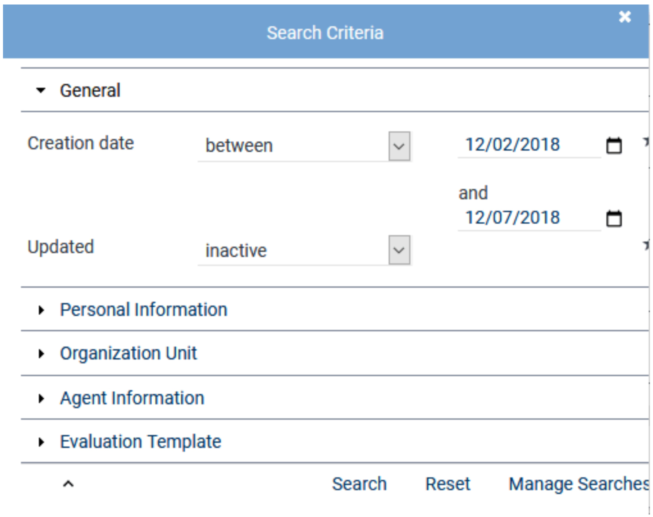


Fig. 43: Search criterion not tagged as favorite (example)

10.8 Change replay server

1. Click on the menu item *Logged in as > Change Replay Server* in the top right corner of the user interface.

   ⇨ The following window appears:

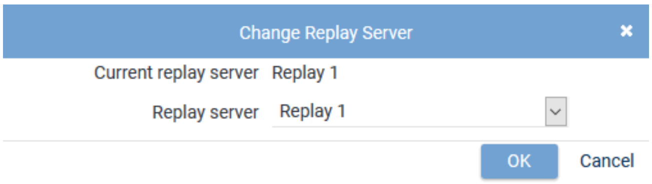


Fig. 44: Change replay server

2. Select the replay server from the drop-down list.
3. To save the change, click on the button *OK*.
   To discard the change, click on the button *Cancel*.

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Glossary

ACD

Automatic Call Distribution is a method in contact centers to distribute evenly calls. The next free employee receives the call.

CPU

Central Processing Unit

RAM

Random Access Memory

URL

Uniform resource locator. Identifies and locates a resource (e. g. a website) about the used access method (e. g. the used network protocol as HTTP or FTP) and the location of the resource in the computer network. (Source: Wikipedia 20th November 2013)

WFO

Workforce optimization