INSPIRATION*neo* for agents

User manual

11/13/2019

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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Contents

1 General information

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2 Introduction

INSPIRATION*neo* supports a predefined user right scenario (default role *Agent*) which has been customized to the tasks of agents. After logging in to INSPIRATION*neo* agents have exactly those modules and functions at their disposal which they need for their job.

As an agent, you have access to the following modules:

- Sessions module

  You can search for sessions, replay and evaluate them.

  See chapter "Sessions module", p. 8.

- Quality Management module

  You can display and manage evaluations you have received.

  See chapter "Quality Management module", p. 32.

- E-Learning module

  You can access provided trainings and quiz tests.

  In addition, agents with coaching advisor rights have the possibility to display and administrate coaching advisor sessions and training sessions.

  See chapter "E-Learning module", p. 45.

Open the respective module by clicking on the corresponding menu item in the navigation bar.

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

In all modules, only the data of the logged-in agent is displayed.

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

3 Sessions module

The Sessions module offers agents to search, replay, and evaluate recorded sessions. Sessions are recorded conversations either with recorded screen activities or mere call recordings. Agents only have access to their own sessions.

In addition, on the basis of sessions, training packages can be displayed which offer agents the possibility to improve themselves by means of real, recorded conversations. As a consequence, deficits are not only revealed but eliminated right away. For further information about training packages see chapter "E-Learning module", p. 45.

Session details

The detail view grants agents an overview of the basic information about the selected session, about included keywords, emotions or tagged comments. That way, they do not have to spend any time in loading the session into the player and listening to it to find out whether it contains important information. Agents can assess immediately whether a session is relevant and whether they would like to analyze it in greater detail in a second step. Within a session, they can jump directly to relevant sections since emotions, keywords, and comments can be tagged to the respective section and thus accessed directly.

In addition, all evaluations which have already been created for the selected session are displayed.

Sessions can be assigned to categories that can be defined according to individual requirements. Calls can be divided into categories such as “orders”, “complaints”, or “cancellations”. That way, it is easy to single out calls with a certain topic at a later moment. By observing how the number of calls in a certain category changes over the time, trends can be deduced.

Searching for calls

A comprehensive search function allows filtering for different search criteria and thus reducing the number of sessions to a manageable amount of relevant calls. Possible search criteria are:

- CTI information (e. g. call direction, hold time or session transfers)
- Information about the time and duration of a session (start time and end time)
- Information about the recording (e. g. conversation type)

The use of so-called wildcards is possible, so that only the beginning or the end of a search term has to be specified. This can be helpful when users are not sure about the proper spelling (e. g. the last names “Maier” or “Meier” will be found with the search query “M*ier”).

If speech analysis technologies are used, it is not only possible to search for general information of a session but for additional content-related criteria, too, which allow narrowing down the topic. The following search criteria can be used:

- Analysis lists (lists containing various keywords for one search topic)
- Synonym lists (lists with synonyms of a keyword)
- Emotions

While general session information helps to single out calls which took place on a special date or had a certain duration, speech analysis allows filtering for calls with a special content or topic (e. g. complaint calls).

To go into the details of the content, there is the additional possibility to use the logical keyword search which combines keywords and analysis lists or synonym lists by means of logical operators (such as “and”, “or”, “not”) to define complex search queries. For more information about speech analysis technology refer to the user manual *INSPIRATIONneo - Usage Audio Analysis module*.

If INSPIRATION*neo* has been integrated into a CRM system or connected to other databases of the call center, it is possible to add further parameters to each recording (e. g. a classification of the calls). This information can later be used as search criteria as well. To offer an even more efficient and intuitive workflow in the search, agents can save their own, frequently used search algorithms to use them again later on.

Replay of a session

The integrated player application allows replaying calls. Among its other functions are:

- Adjusting the replay speed
- Stopping, rewinding or forwarding the recording as required
- Replaying sessions or sections in a loop
- Muting sections of a session to protect sensitive data
- Inserting comments either for the entire session or for certain sections of the session. This function can be used to comment sessions which are to serve as training sessions later on.
- Spectrographic view to be able to recognize extreme amplitudes in volume at first sight and analyze these sections in detail. That way, users can find out whether a customer or an agent reacted angry and raised the voice or whether there were sections of silence because the agent did not know how to deal with a customer’s concern.

Evaluating a session

A session can be evaluated on basis of all relevant information which guarantee a well-founded evaluation: Not only is the session replayed with voice recordings as well as with screen recordings (optional) but a previously selected evaluation template opens, too. Agents can edit the template at their own pace, replay the session in any speed, forward or rewind to important sections, and pause the recording. Furthermore, they can tag comments to sections, e. g. as a reminder why this passage has been especially good or bad. All evaluations belonging to a session are available centrally in the table of the main view of the Evaluations module (see chapter "Quality Management module", p. 32). Finalized evaluations can thus be called up and compared at any time.

Open the Sessions module by clicking on the menu item *Sessions* in the navigation bar.

3.1 Main view

In the main view, all saved sessions are displayed.

> When opening the module, a search filter is set automatically so that only data sets of the current day are displayed.
>
> The function by means of the menu item *General* > *Reset search* does not deactivate this filter!
>
> Click on the menu item *General* > *Search* in the toolbar of the main view to adjust the filter settings according to your individual requirements.

> 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.

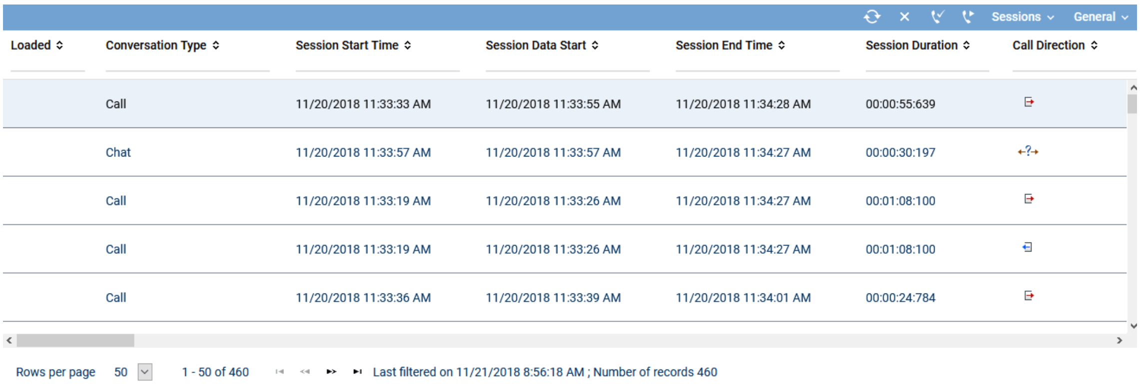


Fig. 1: Main view - Sessions (example)

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

Session Information	
Session Start Time	Shows the start time of the session.
Session Audio Start	Shows the start time of the audio part of the session.
Session End Time	Shows the end time of the session.
Session Duration	Shows the duration of the session.
Conversation Direction	Conversation direction of the session. • *Internal* • *Unknown*
Call Direction	Call direction of the session = incoming = outgoing = transferred = unknown
Kept Session	Shows whether the session is a kept session: = kept = not kept
Evaluated Session	Shows whether the session is an evaluated session: = evaluated = not evaluated
Released for Evaluation	Shows whether the session has been released for evaluation: = released = not released
Calibrated	Shows whether the session is a calibrated session: = calibrated = not calibrated
Training Session	Shows whether the session is a training session: = training session = no training session
Loaded	Shows whether the session has been loaded in the Replay module. = Session has not been loaded.

	 = Session has been loaded. The loaded session is assigned a color from a defined color palette. The order of the colors has been predetermined. If all colors of a palette have been used for several sessions, the color assignment starts from the beginning again. In the Replay module, the loaded session is displayed in the same color.
Session ID	Shows the session ID.
Session Transfers	Number of session transfers.
Creation Date	Date on which the session was created.
Updated	Date on which the session was updated for the last time.
Conversation Information	
Conversation Type	Displays the type of the conversation. Call = call/video call Work item = work item (screen) Call and screen recording = call and screen Text = SMS/SDS Chat = chat
Conversation Start Time	Shows the start time of the conversation.
Conversation Audio Start	Shows the start time of the audio part of the conversation.
Conversation End Time	Shows the end time of the conversation.
Conversation Duration	Shows the duration of the conversation.
Conversation ID	Shows the conversation ID.
Calling Party Information	
Calling Party Name	Shows the name of the calling party.
PBX Agent ID of the calling party	Shows the PBX Agent ID of the calling party.
Calling Party Phone Number	Shows the phone number of the calling party.
Called Party Information	
Called Party Name	Shows the name of the called party.
Called Party PBX Agent ID	Shows the PBX Agent ID of the called party.
Called Party Phone Number	Shows the phone number of the called party.
1st-Connected Participant Information	
1st-Connected Name	Shows the name of the 1st connected.
1st-Connected PBX Agent ID	Shows the PBX Agent ID of the 1st connected.
1st-connected phone number	Shows the phone number of the 1st connected.
Chat Information	
Subject	Shows the subject of the chat.
Statistics of the Conversation	

Number of Ringing Sections	Shows the number of ringing sections.
Duration of Ringing Sections	Shows the duration of the ringing sections.
Number of Hold Sections	Shows the number of hold sections.
Duration of Hold Sections	Shows the duration of the hold sections.
Number of Connected Sections	Shows the number of connected sections.
Duration of Connected Sections	Shows the duration of the connected sections.
Number of Failed Callbacks	Shows the number of failed callbacks.
Number of Successful Callbacks	Shows the number of successful callbacks.
Conversation ID of Callback Request	Shows the conversation ID of the callback request.
General	
Agent	Name of the agent who is the subject of the session. If several agents participate in a call, a session is created for each agent.
Hold Time	Shows how long the session was "on hold".
Comment	Shows the comments about the session in text.
Customer ID	Shows the ID of the customer. The customer ID can be used to view and administrate a coherent customer history.
Wrap-up Time	Time needed for the post-editing.
Participants	Shows all participant who have participated in a session or in a conversation.
Transaction ID	Shows the ID of the transaction. The transaction ID can be used to view and administrate a coherent transaction history.

Furthermore, all additional data which has been configured and marked as available in the Additional Data module of the System Configuration appears in its individual column.

3.1.1 Toolbar

The toolbar offers the following functions.

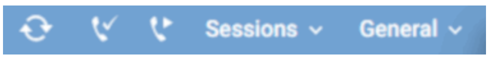


Fig. 2: Toolbar Sessions module

	Refresh	Refreshes the conversation table in the main view.
	Evaluate	The selected session is evaluated. See chapter "Evaluate session", p. 23.
	Load	Loads the selected session into the Replay module for replay. See chapter "Load session", p. 29. For information about the functions of the Replay module see chapter "Replay module", p. 68.
Sessions	*Administrate Categories*	Here, you can assign a category to the selected session. See chapter "Administrate categories", p. 28.

	Logical Keyword Search	Here, you can start the logical keyword search. See chapter "Logical keyword search", p. 30. **NOTICE!** This function is only available if the speech analysis software has been installed and licensed.
	Full-Text Search	Here, you can start a full-text search. See chapter "Logical keyword search", p. 30. **NOTICE!** This function is only available if the speech analysis software has been installed and licensed.
	Release for Evaluation	Here, you can release sessions for evaluation. See chapter "Release session for evaluation", p. 26 **NOTICE!** This function is only available if the option *Release sessions* has been activated.
General	*Print*	Prints the table of the main view.
	Adjust Table	Opens a window in which you can adjust the following settings for the main view: • Displayed information • Order of the displayed columns • Number of rows per page
	Search	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. 13. When opening the module, a search filter is set automatically so that only data sets of the current day are displayed. The function by means of the menu item *General* > *Reset Search* does not deactivate this filter.
	Reset Search	Resets all manually entered search criteria. The search is started without manual filter settings.
	General Help	By clicking on the menu item *General Help*, a description of the application you are currently viewing is opened.
	Module Help	By clicking on the menu item *Module Help*, 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.

3.1.1.1 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.

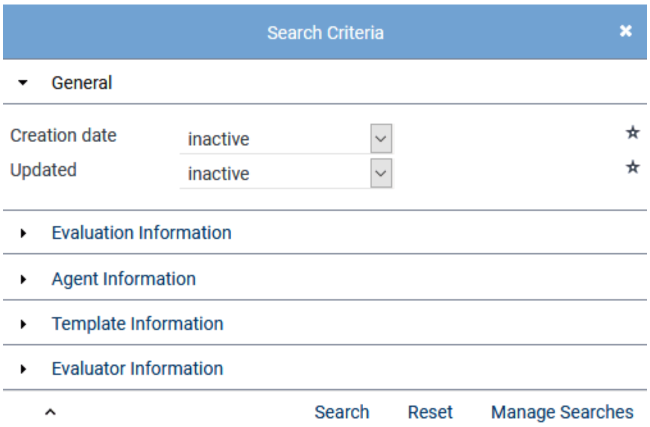


Fig. 3: Window Search Criteria (example)

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 Detail view

The detail view contains additional information about and functions of the selected session.

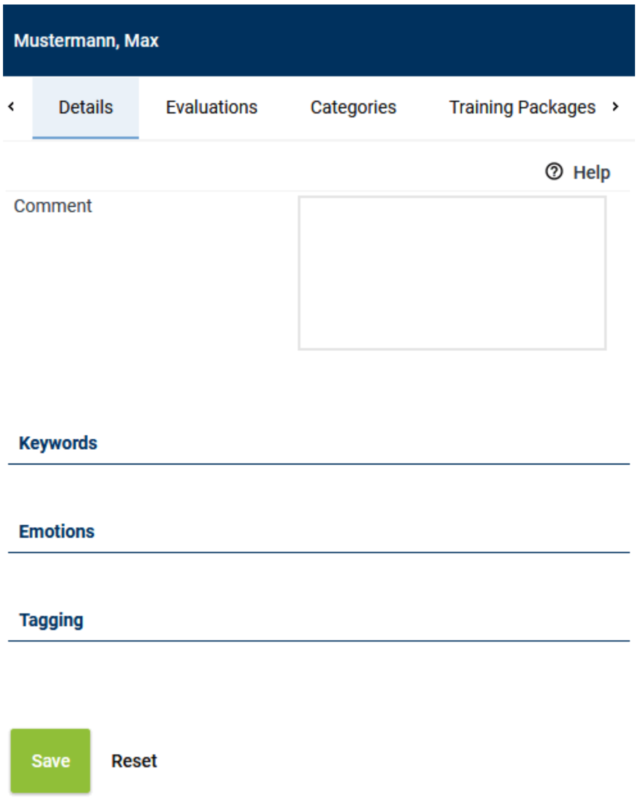


Fig. 4: Sessions module - detail view (example)

The detail view consists of the following tabs:

- *Details*

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

  See chapter "Tab Details", p. 16.
- *Evaluations*

  Here, you can view and print the evaluations of the selected session.

  See chapter "Tab Evaluations", p. 17.
- *Categories*

  Here, you can assign categories to the session.

  See chapter "Tab Categories", p. 19
- *Training Packages*

  Here, you can view the training packages which have been assigned to the session.

  See chapter "Tab Training Packages", p. 20.
- *Conversation Details*

  Shows detailed information about the selected conversation.

  See chapter "Tab Conversation Details", p. 22
- *Participants*

  Shows participant information about the selected conversation.

  See chapter "Tab Participant", p. 22
- *Additional Data*

  Here, you can enter and edit additional data of the selected conversation.

  See chapter "Tab Additional Data", p. 23.

3.2.1 Tab Details

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

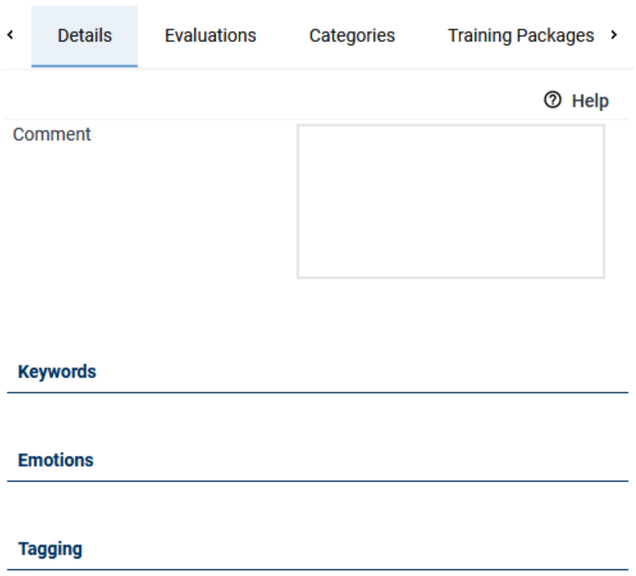


Fig. 5: Tab Details (example)

Comment	Text field in which the comments about the session are displayed. New comments can be entered. Existing comments can be edited.

Group field Keywords

This option is only available if the speech analysis software has been installed and licensed.

Here, the keywords which have been found in the session are displayed. The chronological position, the analysis list as well as the accuracy of the keyword are displayed.

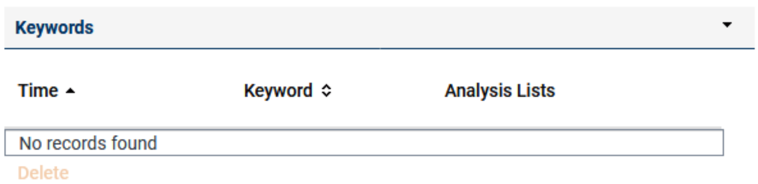


Fig. 6: Group field Keywords

Delete	Deletes the selected hit from the list.

Group field Emotions

This option is only available if the speech analysis software has been installed and licensed.

Here, you can see emotions which have been found in the session and delete them if required. The position and the type of the emotion is displayed.

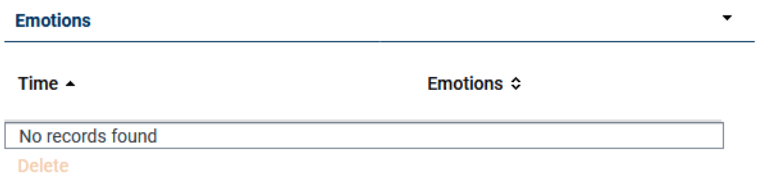


Fig. 7: Group field Emotions

Delete	Deletes the selected hit from the list. You need to have the respective right for this function.

Group field Tagging

ⓘ This option is not available for all conversation types.

Here, you can see taggings which have been added to the selected session in the Replay module.

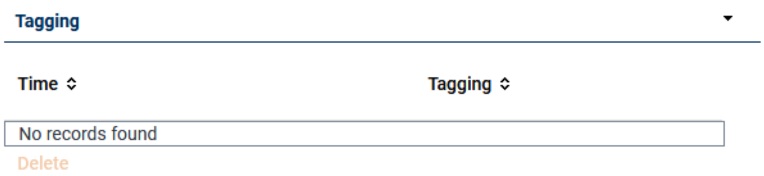


Fig. 8: Group field Tagging

Delete	Removes the selected tagging from the list.

3.2.2 Tab Evaluations

Here, you can view and print the evaluations of the selected session.

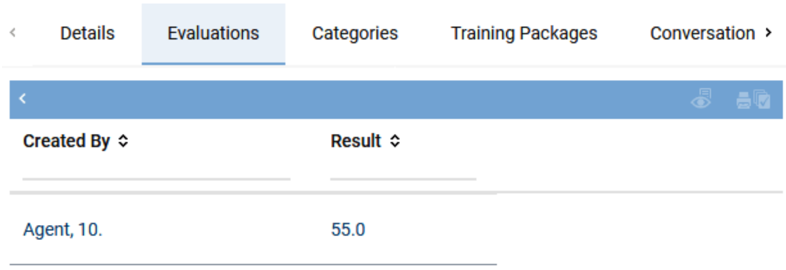


Fig. 9: Tab Evaluations

	View	Opens a window in which you can view the selected evaluation. See chapter "View evaluation", p. 17.
	Print evaluation	Prints the content of the selected evaluation. See chapter "Print evaluation", p. 18.

3.2.2.1 View evaluation

1. Select the evaluation you would like to view in the list of the available evaluations.

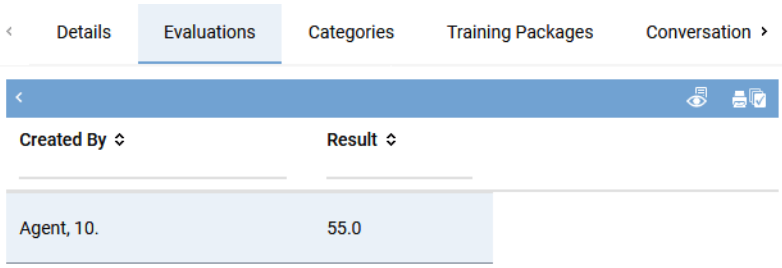


Fig. 10: Tab Evaluations

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

   ⇨ The window with the evaluation appears.

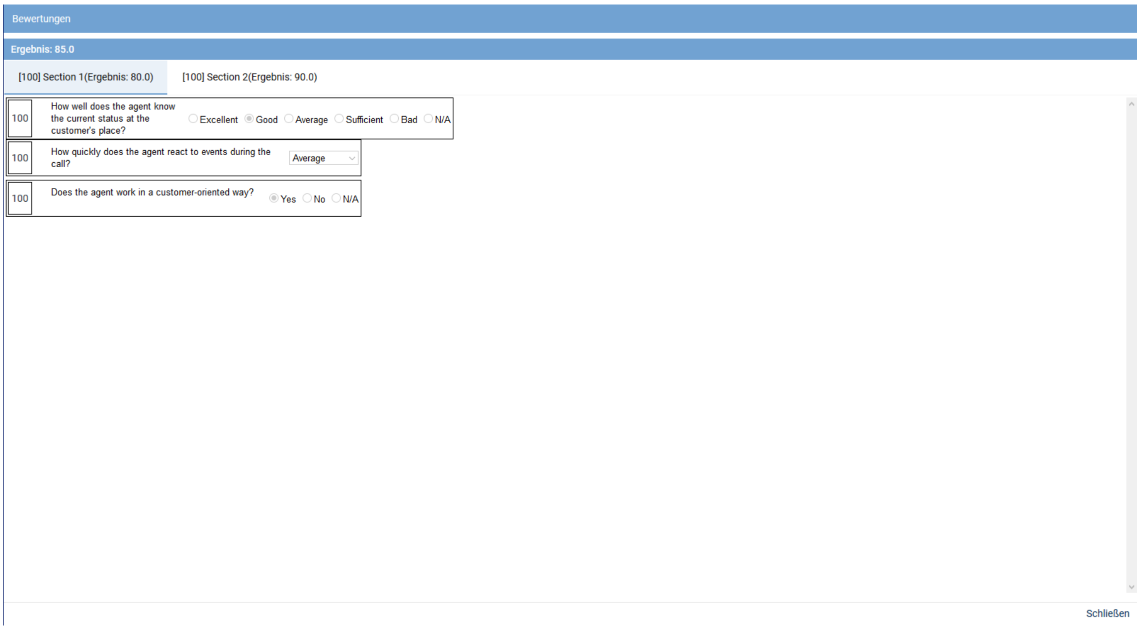


Fig. 11: Evaluation (example)

3. To change the section, click on the name of the section above the template area.
4. To close the screen, click on the button *Close*.

3.2.2.2 Print evaluation

This function allows printing the selected evaluation.

1. Click on the icon *(Print evaluation)*.

   ⇨ 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.

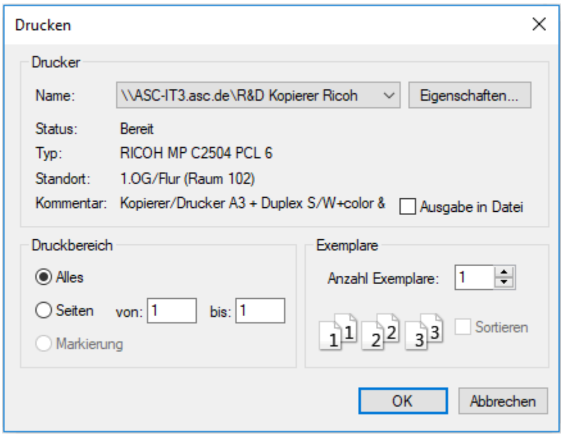


Fig. 12: Print (example)

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*.

3.2.3 Tab Categories

Here, you can display and edit the categories of the session.

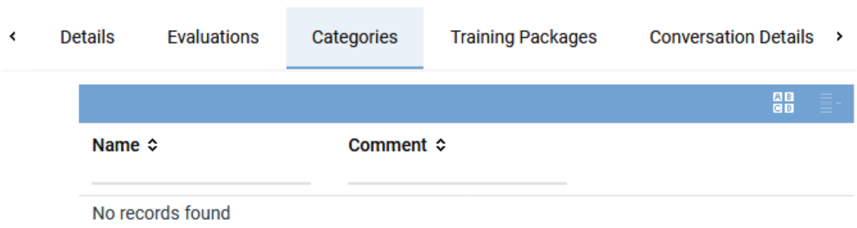


Fig. 13: Tab Categories

	Administrate categories	Here, you can add a category. See chapter "Add category", p. 19.
	Remove	Here, you can remove a category. See chapter "Remove category", p. 20.

3.2.3.1 Add category

1. Select the tab *Categories*.
2. Click on the icon *(Administrate categories)*.

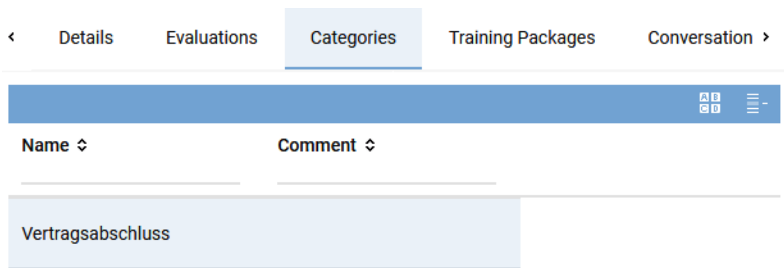


Fig. 14: Add categories (example)

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.

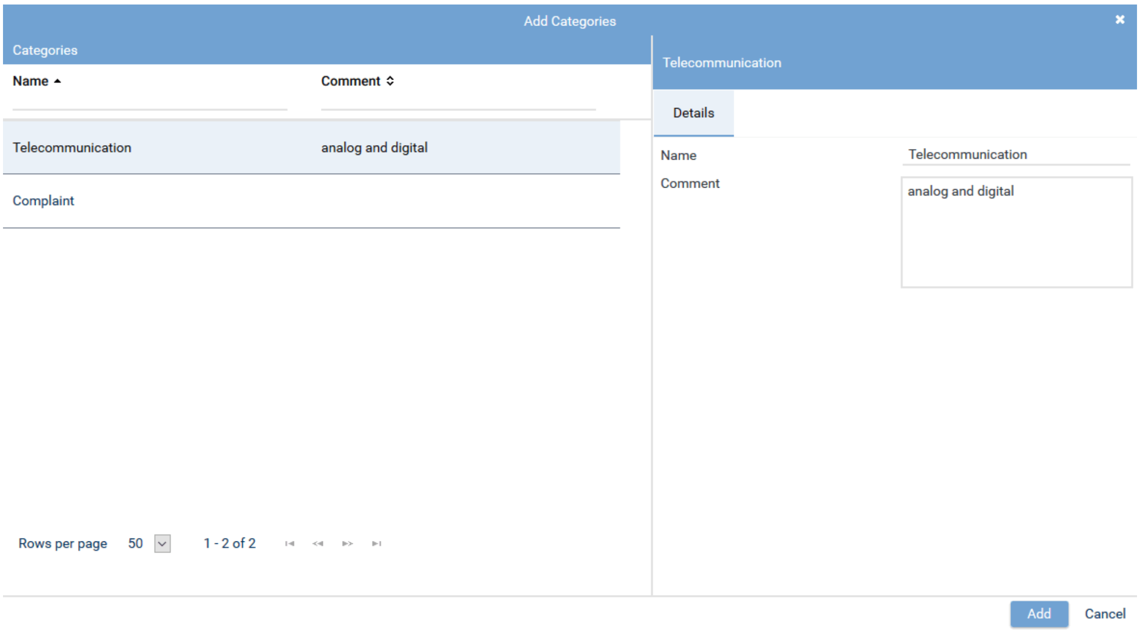


Fig. 15: Select categories

4. To add the selected categories, click on the button *Add*.
   To discard the selection and close the window, click on the button *Cancel*.
5. To save the entries, click on the button *Save*.
   To discard the entries, click on the button *Reset*.

3.2.3.2 Remove category

1. Select the tab *Categories*.
2. To remove the assignment of a category, select the respective category in the list and click on the icon *(Remove)*.

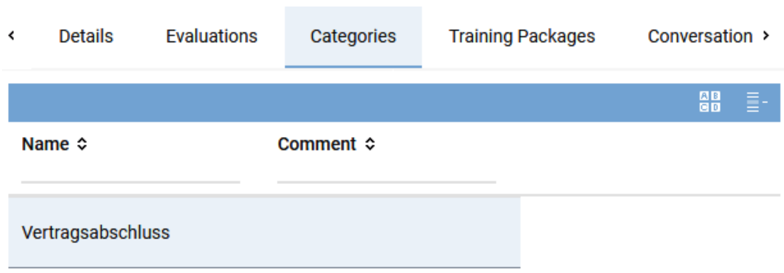


Fig. 16: Remove category assignment (example)

3. To save the entries, click on the button *Save*.
   To discard the entries, click on the button *Reset*.

3.2.4 Tab Training Packages

Here, you can view a training package based on the selected session.

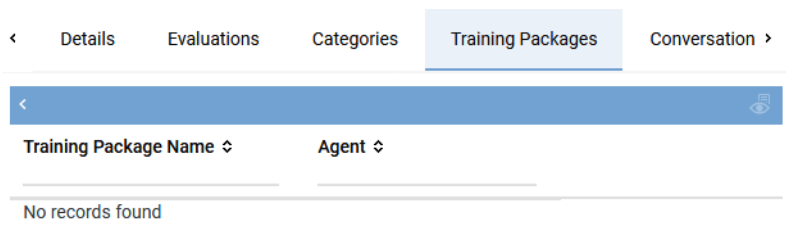


Fig. 17: Tab Training Packages (example)

	View training package	Here, you can view a training package which is already in the selection. See chapter "View training package", p. 21.

3.2.4.1 View training package

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

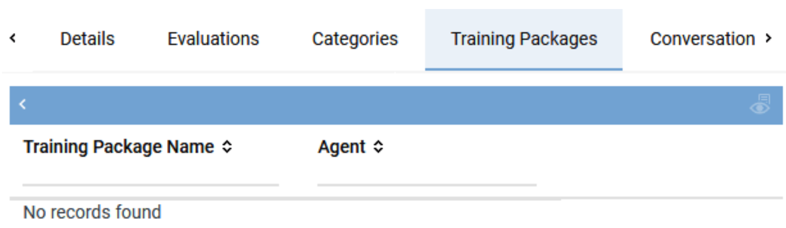


Fig. 18: Select training package (example)

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

   ⇨ The window *Training Package* appears.

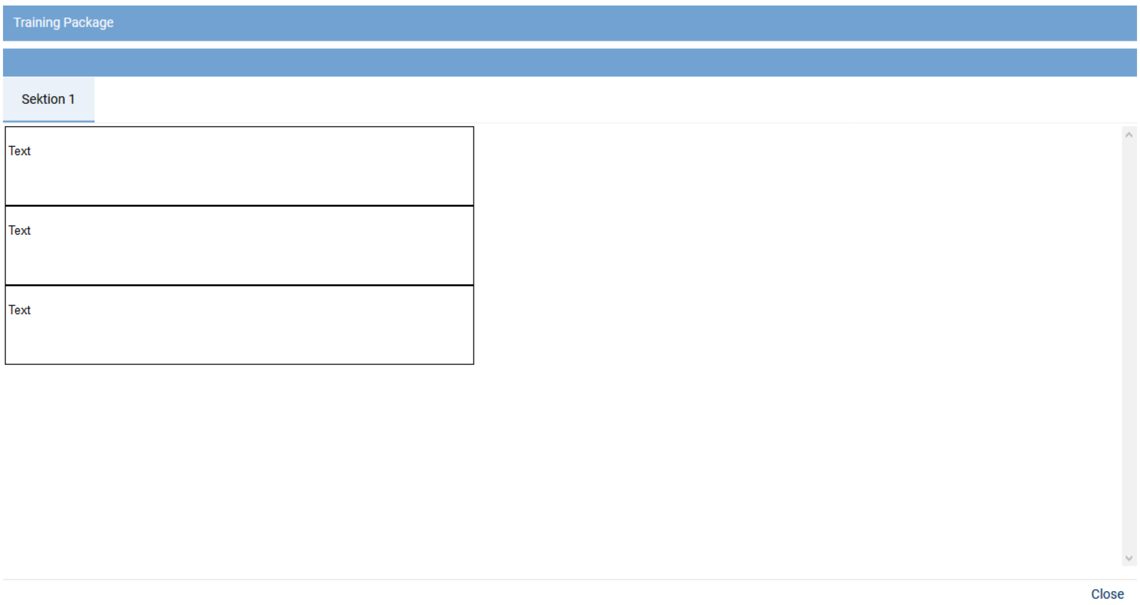


Fig. 19: View training package (example)

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.

3.2.5 Tab Conversation Details

Shows detailed information about the selected conversation.

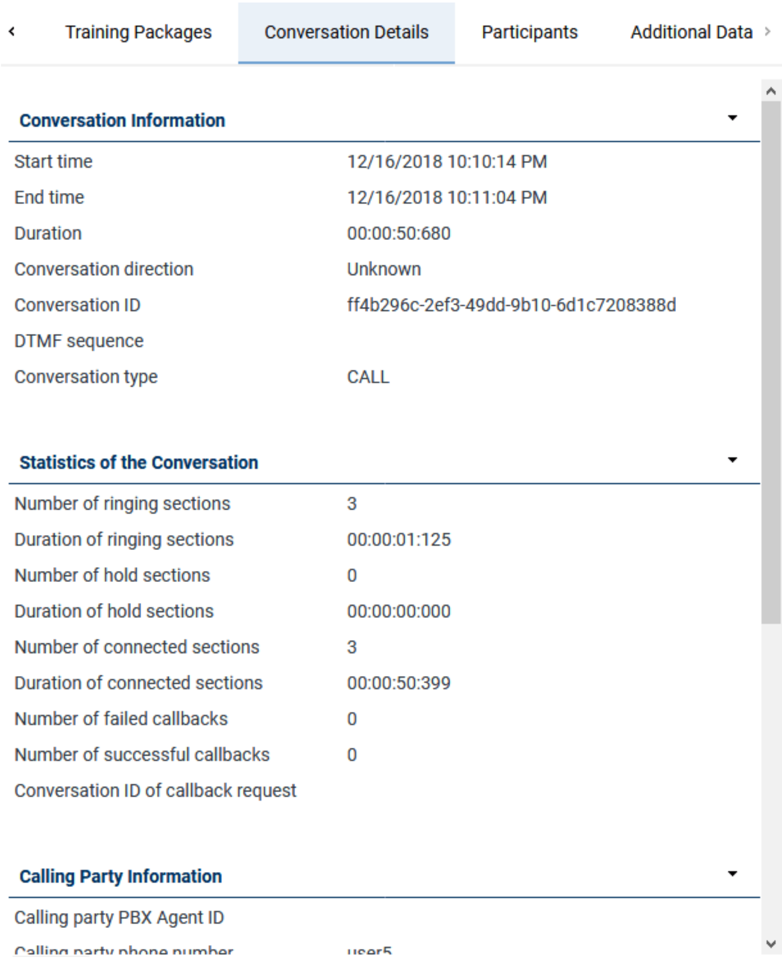


Fig. 20: Tab Conversation Details (example)

A description of the displayed information can be found in chapter "Main view", p. 9. The displayed information in the detail view depends on the configuration of the columns in the main view.

3.2.6 Tab Participant

Shows participant information about the selected conversation.

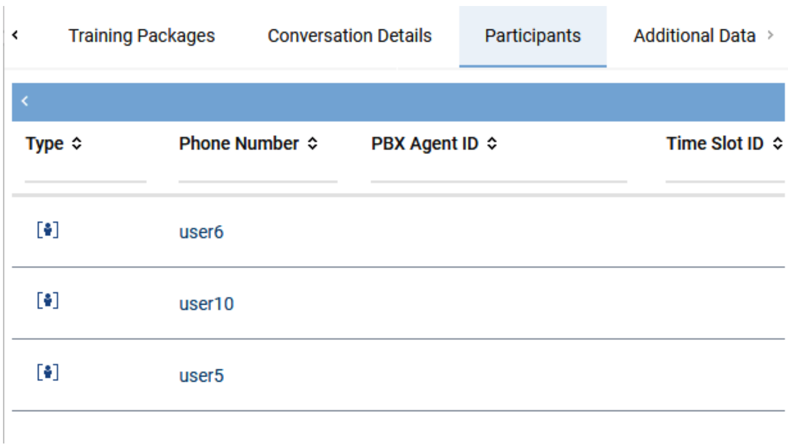


Fig. 21: Tab Participants (example)

The following functions are available:

	No sorting
	Descending sort sequence
	Ascending sort sequence

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

3.2.7 Tab Additional Data

Shows additional data which has been tagged to the selected session.

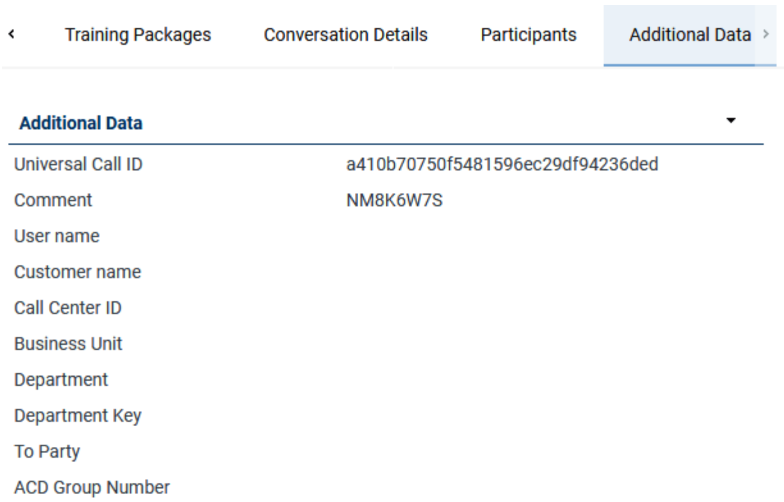


Fig. 22: Tab Additional Data

3.3 Evaluate session

To be able to replay a session consisting of a call and a video recording, you have to have the respective right.

If the option *Release sessions* has been activated, the supervisor can only evaluate sessions which have been released by the agent.
(*Employees module -> Settings -> Settings for Session Release*)

1. In the main view, select the session you would like to evaluate.
2. Click on the icon *(Evaluate)*.
3. Select one of the following options:

Evaluate All	This option allows evaluating the complete session. If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module. If a text message has been saved, then the SMS or SDS recording is displayed in a separate window of the Replay module. If a chat recording has been saved, then the chat text is displayed in the Message Viewer of the Replay module. If a video recording has been saved, then the video call is displayed in the Video Viewer of the Replay module.
Evaluate Audio	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.

	The option is only active if a voice recording has been saved for the selected session.
Evaluate Screen	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. The option is only active if a screen recording has been saved for the selected session.
Evaluate SMS/SDS Text	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. The option is only active if a SMS or SDS recording has been saved for the selected session.
Evaluate Chat Text	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. The option is only active if a chat recording has been saved for the selected session.
Evaluate Video	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.

4. The following window appears:

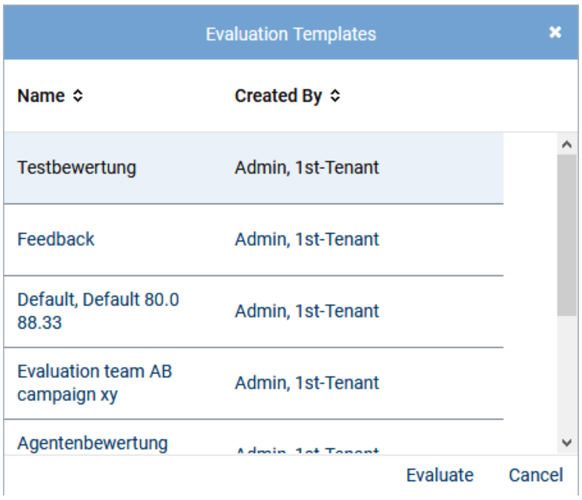


Fig. 23: Evaluation templates (example)

5. Select an evaluation template from the list and click on the button *Evaluate*.

   ⇨ The following window appears:

Fig. 24: Evaluations (example)

6. Complete the evaluation template accordingly.
7. To change the section in the evaluation template, click on the name of the section above the evaluation area.
8. 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. 68.
9. To apply the evaluation, click on the button *Apply*.
10. To save the evaluation and release it directly, click on the button *Yes*. In this case, the evaluation cannot be edited anymore.
    To save the evaluation without releasing it right away, click on the button *No*. In this case, the evaluation can still be edited at a later moment in the Evaluations module, see user manual *INSPIRATIONneo - Usage Quality Management module*.

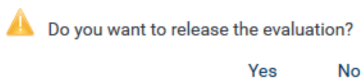


Fig. 25: Release evaluation

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

Fig. 26: Close evaluation (example)

12. The released evaluation is displayed in the table of the main view in the column *Evaluated Session* with the status *Evaluated*.

3.4 Release session for evaluation

This function is only active if the option *Release sessions* has been activated for an agent in the application System Configuration.
(*Employees module -> Settings -> Settings for Session Release*)

Use this function if you are an agent and have to actively release sessions for evaluation.

1. Click on the menu item *Sessions* > *Release for Evaluation* in the toolbar of the main view.
   ⇨ The window *Release* appears.

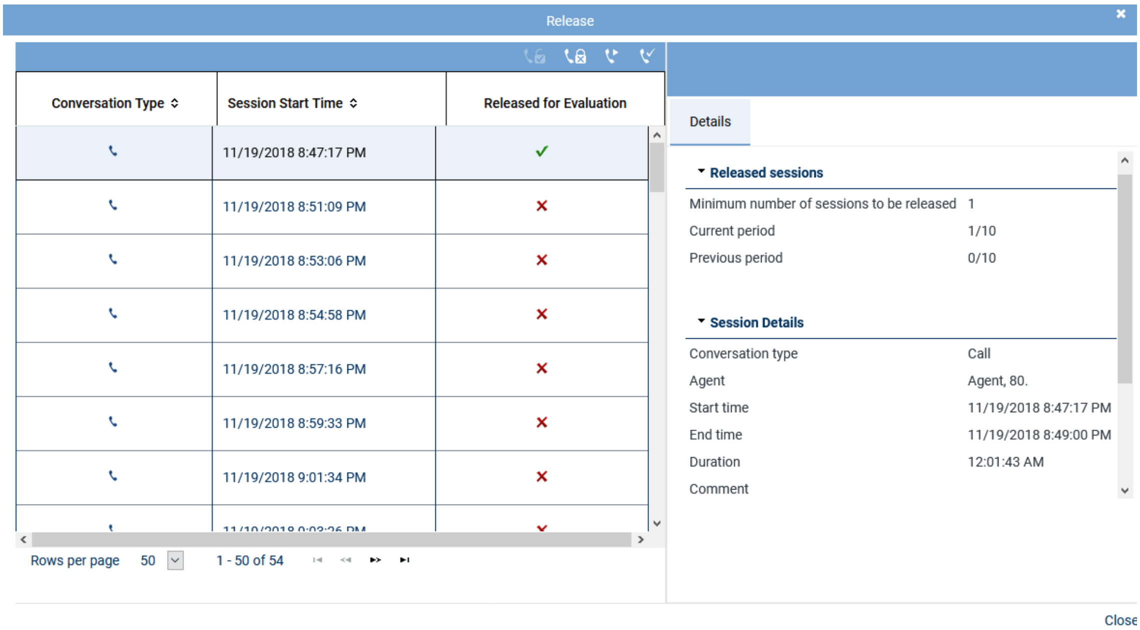


Fig. 27: Release sessions (as agent)

In the main view, all the agent's sessions are displayed.

The following information about the session is displayed:

Conversation Type	Displays the type of the conversation. Call = call/video call Work item = work item (screen) Call and screen recording = call and screen Text = SMS/SDS Chat = chat

Session Start Time	Shows the start time of the session.
Released for Evaluation	Shows whether the session has been released for evaluation: ✓ = released ✗ = not released

In the detail view, you can display detailed information about the selected session.

Group field Released Sessions

Minimum number of sessions to be released	The number show how many session have to be released at least during the defined period of time.
Current period	The first number indicates how many of the sessions which have to be released at the maximum within the defined period of time have already been released. The number show how many session can to be released at maximum during the defined period of time.
Previous period	The first number indicates how many of the sessions which have to be released at the maximum within the previous period of time have been released. The second number show how many session have to be released from the previous period of time.

Group field Session Details

Shows information about the selected session. A description of the displayed information can be found in chapter "Main view", p. 9.

1. Select a session in the main view.
2. To replay a session, click on the icon *(Load)*, see chapter "Load session", p. 29.
3. To release a session, click on the icon *(Release session)*, see chapter "Release session", p. 27.
   ⇨ The released session is displayed in the table of the main view of the Sessions module, in the column *Released for Evaluation* with the status *Evaluated*.
4. To remove a session from the evaluation process which has originally been released for evaluation, click on the icon *(Lock session)*, see chapter "Lock session", p. 28.
   ⇨ The locked session is displayed in the table of the main view of the Sessions module, in the column *Released for Evaluation* with the status *Not evaluated*.
5. To evaluate a session, click on the icon *(Evaluate)*, see chapter "Evaluate session", p. 23.
6. To close the window *Release*, click on the button *Close*.

3.4.1 Release session

ⓘ To be able to release a session, you have to have the respective right.

This function allows you to release a session for evaluation by a supervisor.

1. In the main view, select the session you would like to release.
2. Click on the icon *(Release session)* in the toolbar.

All agents have the right to lock their sessions as long as they have not yet been evaluated, see chapter "Lock session", p. 28.

3.4.2 Lock session

To be able to lock a released session, you have to have the respective right and the session must not have been evaluated yet.

This function allows locking a released session. If you lock a session, it remains visible for the agent but it cannot be evaluated by the supervisor (superior) anymore.

1. In the main view, select the session you would like to lock.
2. Click on the icon *(Lock session)* in the toolbar.

⇨ The session cannot be evaluated by the supervisor (superior) anymore.

All agents have the right to release their sessions one again, see chapter "Release session", p. 27.

3.5 Administrate categories

Here, you can assign a category to the selected session.

The categories cannot be changed.

1. In the main view, select the session that you would like to assign a category to.
2. Click on the menu item *Sessions* > *Administrate Categories* in the toolbar of the main view.
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.

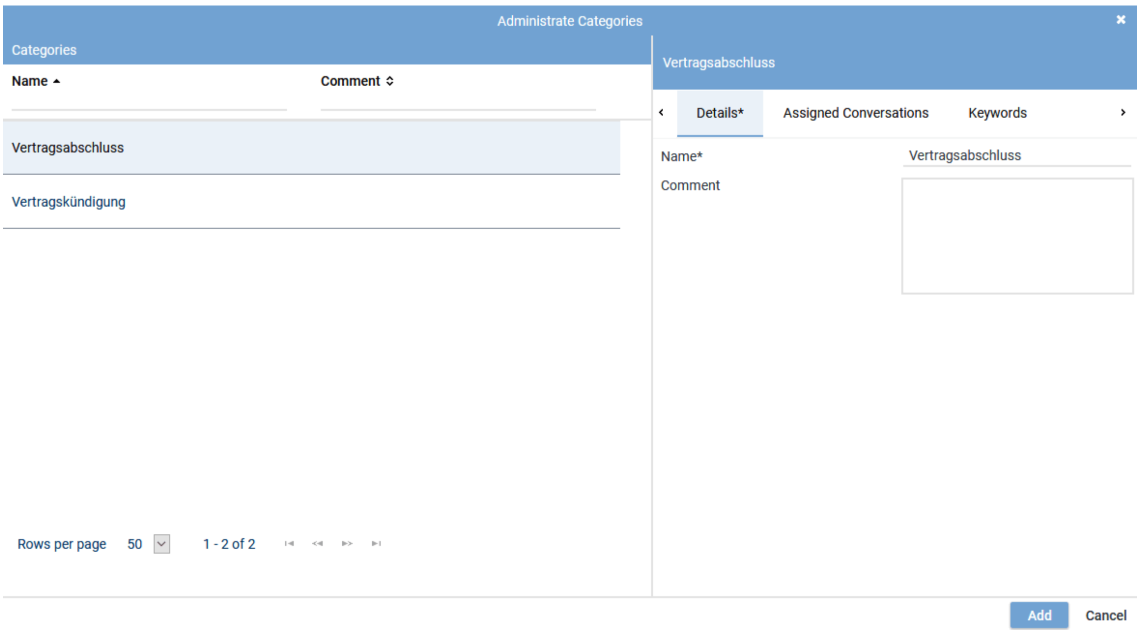


Fig. 28: Select categories (example)

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

5. To save the entries, click on the button *Save*.
   To discard the entries, click on the button *Reset*.

3.6 Load session

This function allows loading sessions into the Replay module and replaying them there.

1. In the main view, select the session you would like to replay.
2. Click on the icon *(Load)*.
3. Select one of the following options:

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

4. 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. 68.

A conversation can also be loaded into and replayed in the Replay module by double-clicking on the element in the main view.

3.7 Logical keyword search

This function is only available if the speech analysis software has been installed and licensed.

This function allows you to search the sessions for hits.

1. Click on the menu item *Sessions* > *Logical Keyword Search* in the toolbar of the main view.

   ⇨ The window *Logical Keyword Search* appears.

2. Here, you can search the session for keywords.

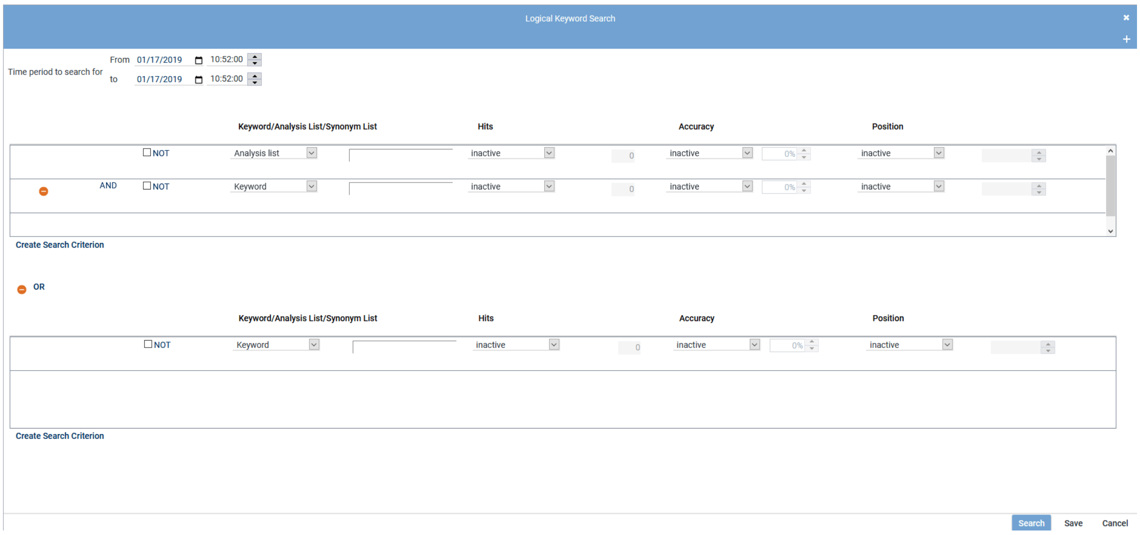


Fig. 29: Logical keyword search

The main window is divided into 2 sections:

Time period to search for	Here, you can enter the time period of the sessions in which you would like to search. You can enter the date directly in both entry fields via the keyboard or via the icon . Next to the date, you can enter the exact time.
List of the search criteria	Here, the entered and already saved search criteria are displayed. Via the button *Create Search Criterion* you can add a new criterion. The icon removes the selected criterion from the selection.

In the list of the search criteria, there are the following columns:

- Keyword/Analysis List/Synonym List

  Here, you can select whether you would like to search for individual words or entire lists.

  – Keywords are entered by auto-complete. You can only enter words which have actually been found previously by an audio analysis job.

  – The lists are entered by auto-complete. You can enter all lists which have previously been created in the Audio Analysis module regardless of whether this list has actually delivered hits.

- Hits

  You have two options:

  – *inactive* = The criterion has been deactivated.

  – *equal* = The number of the actual hits exactly matches the value entered.

  - *smaller or equal* = The number of the actual hits is smaller than or equal to the value entered.
  - *greater or equal* = The number of the actual hits is greater than or equal to the value entered.
- Accuracy

  You have two options:
  - *inactive* = The criterion has been deactivated.
  - *equal* = The accuracy exactly matches the value entered.
  - *smaller or equal* = The accuracy is smaller than or equal to the value entered.
  - *greater or equal* = The accuracy is greater than or equal to the value entered.

  Using a high percentage will create few results with a high accuracy. Using a low percentage will create many results with a low accuracy.
- Position

  You have two options:
  - *inactive* = The criterion has been deactivated.
  - *greater than* = The hit is supposed to lie after the entered time value.
  - *smaller than* = The hit is supposed to lie before the entered time value.
  - *between* = The hit is supposed to lie between the 2 entered time values.
  - *equal* = The hit is supposed to lie exactly on the entered time value.
  - *not equal* = The hit is supposed to lie on any time value except for the entered one.

  The position defines the keyword's position in time within a session.

By clicking on the icon + on the upper right, you can add another search group. The new group consists of individual search criteria and is displayed below the existing group.

Within a group, all added criteria have to be met to obtain a result. If you created several groups, they are analyzed one after another.

3. To run the search, click on the button *Search*.
4. To save the search, click on the button *Save*.
5. To cancel the search, click on the button *Cancel*.

4 Quality Management module

The Quality Management module contains the Evaluations module. In the Evaluations module, you can display, manage, and re-evaluate evaluations you have made or received. 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 the session that has led to this evaluation can be replayed at any later moment. This allows tracing back the reasons of the evaluation.

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

4.1 Evaluations module

4.1.1 General

The Evaluations module enables the user to administrate and re-evaluate evaluations. All evaluations are displayed which have been made in the Agents module and in the Sessions module.

4.1.2 Main view

In the main view, all saved evaluations are displayed.

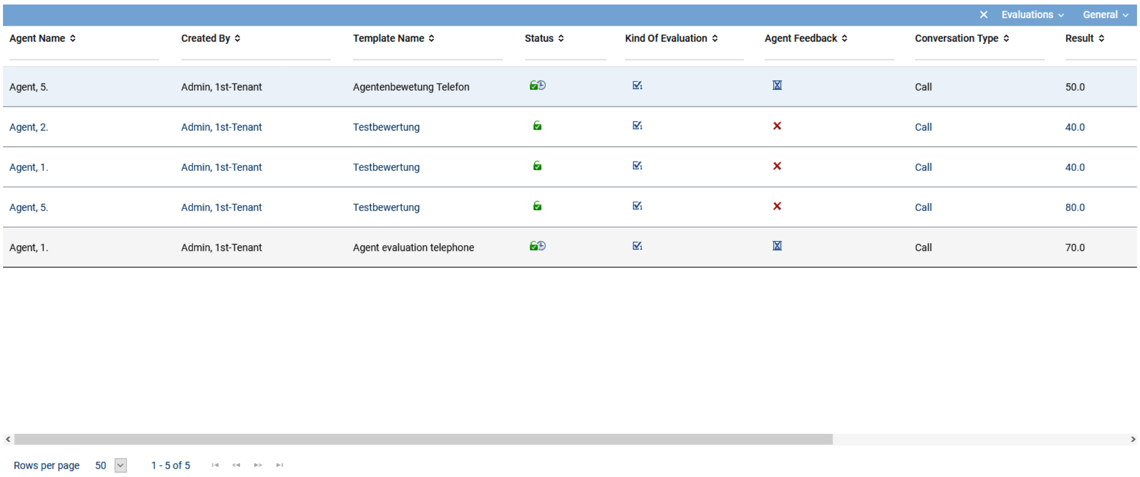


Fig. 30: Evaluations - main view (example)

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.
Conversation Type	Shows the type of the evaluation: • *Call* (only phone call or video call) • *Work item* (only screen activity) • *Chat* • *Conversation* (phone call including screen activity)
Result	Shows the result (achieved score) of the evaluation.
Contains Note	Shows whether the evaluation contains a note.
Call ID	Shows the call ID which serves to map the evaluation to the call.
Creation Date	Date on which the evaluation was created.
Updated	Date on which the evaluation was updated for the last time.

4.1.2.1 Toolbar

The toolbar offers the following functions.

Fig. 31: Toolbar Evaluations module

	Delete	Function has been deactivated.
Evaluations	*View*	Shows the carried-out evaluation. See chapter "View evaluation", p. 40.
	Re-Evaluate	Allows a new evaluation. See chapter "Re-evaluate", p. 41.
	Assign Mediation Evaluation	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. 41.
	Release Evaluation	Function has been deactivated.

	Finalize Calibration Evaluation *)	Function has been deactivated.
	Summary	Creates a summary of the selected evaluation. See chapter "Create summary", p. 42.
	Load *)	Loads the assigned session into the Replay module for replay. See chapter "Load session", p. 43. For information about the functions of the Replay module see chapter "Replay module", p. 68.
	Print Evaluation	Prints the content of the selected evaluation.
General	*Print*	Prints the table of the main view.
	Adjust Table	Opens a window in which you can adjust the following settings for the main view: • Displayed information • Order of the displayed columns • Number of rows per page
	Search	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. 13.
	Reset Search	Resets all manually entered search criteria. The search is started without manual filter settings.
	General Help	By clicking on the menu item *General Help*, a description of the application you are currently viewing is opened.
	Module Help	By clicking on the menu item *Module Help*, 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.

4.1.3 Detail view

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

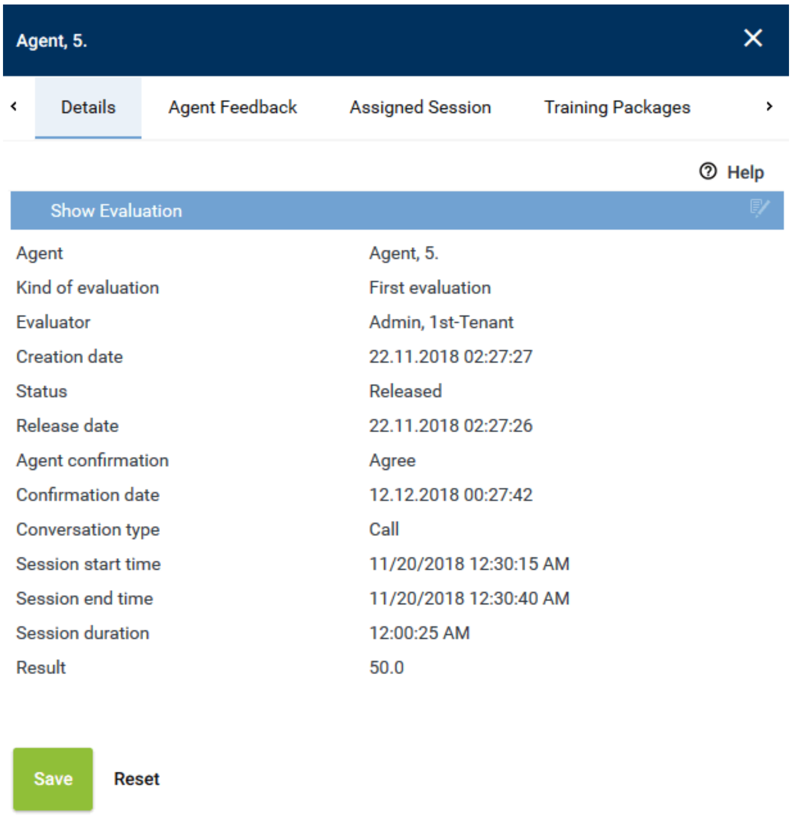


Fig. 32: Evaluation of an agent - detail view (example)

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. 35.
- *Agent Feedback*

  Here, you can enter a feedback for your evaluation.

  See chapter "Tab Agent Feedback", p. 38.
- *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. 38.
- *Training Packages*

  Here, you can view training packages.

  See chapter "Tab Training Packages", p. 39.

4.1.3.1 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.

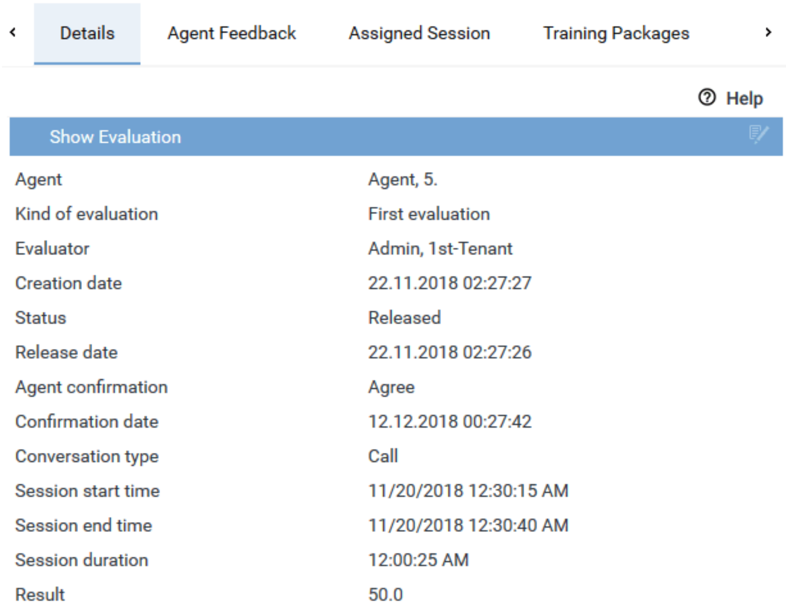


Fig. 33: Evaluation of a session - detail view (example)

You can edit an evaluation as long as it has the status *Draft* and if you have created the evaluation yourself.

1. Click on the icon *(Edit)* to edit the evaluation. See chapter "Edit evaluation", p. 37

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: • *First evaluation* • *Re-evaluation* • *Reference evaluation* (for calibrations only) • *Calibration evaluation* (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: • *Draft* • *Released* • *Ignored* • *Obsolete* • *Open* (for calibrations only) • *Pending* (for calibrations only) • *Finished* (for calibrations only)
Release date	Date on which the evaluation was released.
Agent confirmation	Status of the agent feedback (only with activated option *Agent feedback activated* 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.

	The following statuses are available: • *Not yet confirmed* • *Agree* • *Disagree* • *Overruled*
Confirmation date	Date on which the agent has submitted his feedback (only with activated option *Agent feedback activated* in the template).
Submission date	Submission date of the evaluation (for calibrations only)
Name of the calibration	Name of the calibration (for calibrations only)
Conversation type	Type of the evaluation (for calibrations and sessions only) The following types are available: • Call • Work item • Text • Chat
Session start time	Start time of the session (for calibrations and sessions only)
Session end time	End time of the session (for calibrations and sessions only)
Session duration	Duration of the session (for calibrations and sessions only)
Result	Shows the result (achieved score) of the evaluation.

4.1.3.1.1 Edit evaluation

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

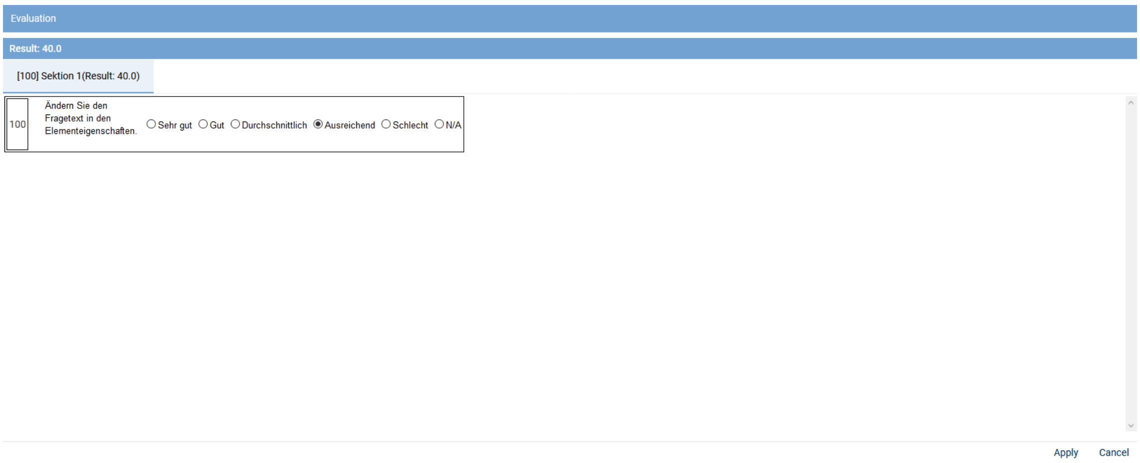


Fig. 34: Repeat evaluation

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. 68.
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 (*Re-leased*) in the column *Status*.
   ⇨ The old evaluation is displayed in the table of the main view with the icon (*Obso-lete*) 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 be edited.

4.1.3.2 Tab Agent Feedback

The tab is only displayed under the following conditions:

- The option *Enable agent feedback* has been activated in the evaluation template.
- The evaluation has been released.

Depending on the status of the evaluation (Agent feedback pending or Released), you can carry out the agent confirmation or view detailed information about the agent feedback.

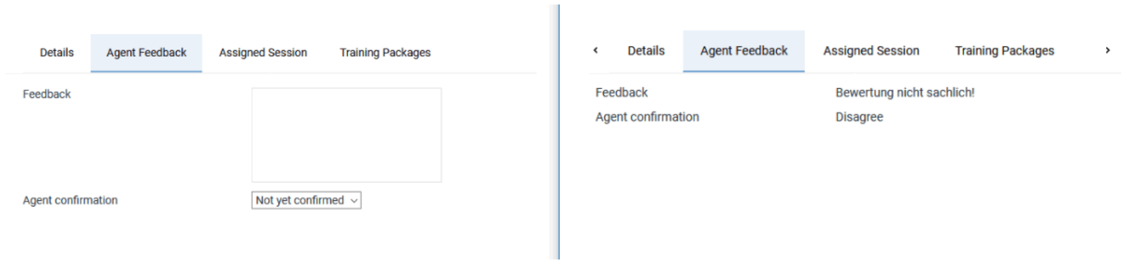


Fig. 35: Agent feedback (example)

In general, the following information can be entered or is available:

Feedback	Allows entering a comment or displays the comment an agents has en-tered for the evaluation.
Agent confirmation	Allows entering a status or displays the status of the agent feedback. The following statuses are available: • *Not yet confirmed* - The agent has not confirmed the evaluation yet. • *Agreed* - The agent agrees with the evaluation. • *Disagree* - The agent does not agree with the evaluation. • *Overruled* - The agent did not agree with the evaluation and was overruled by the evaluator.
Comment	Shows the comment of the evaluator. Comments can only be entered as an explanation if an agent has been outvoted, for instance.

4.1.3.3 Tab Assigned Session

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

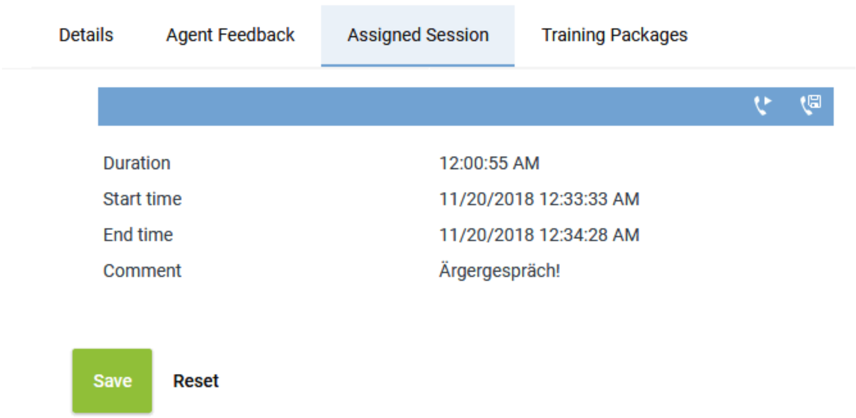


Fig. 36: Assigned session - detail view (example)

4.1.3.4 Tab Training Packages

Here, you can view training packages.

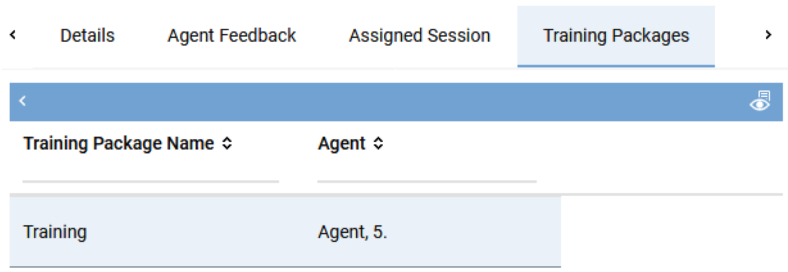


Fig. 37: Tab Training Packages (example)

	View training package	Here, you can view a training package which is already in the selection. See chapter "View training package", p. 39.

4.1.3.4.1 View training package

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

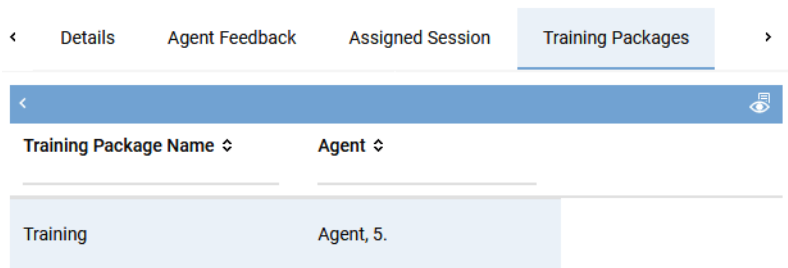


Fig. 38: Select training package (example)

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

   ⇨ The window *Training Package* appears.

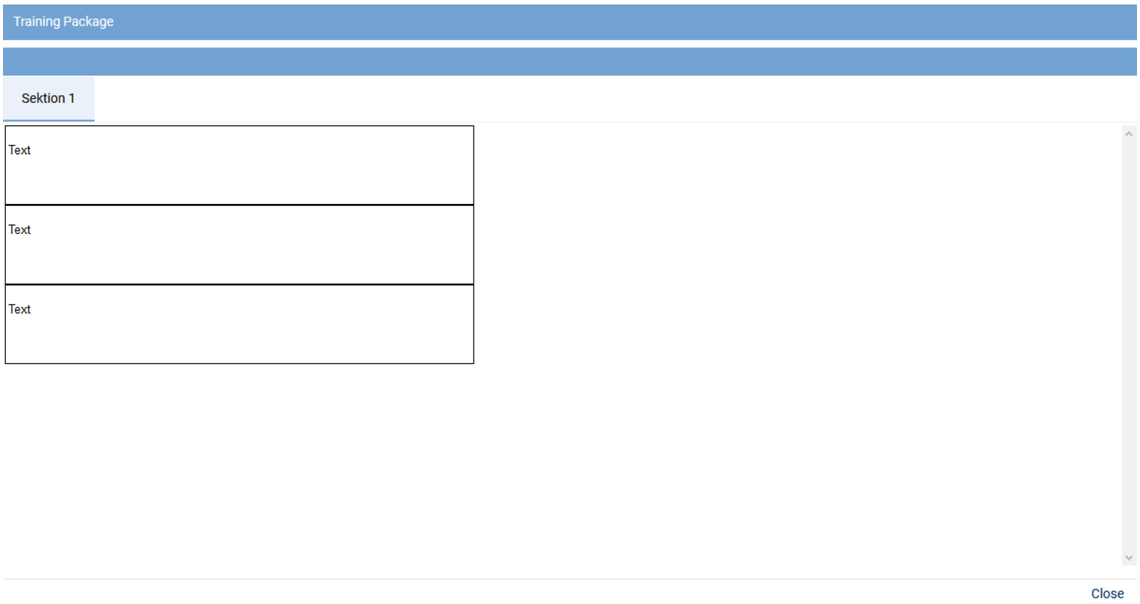


Fig. 39: View training package (example)

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.

4.1.4 View evaluation

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

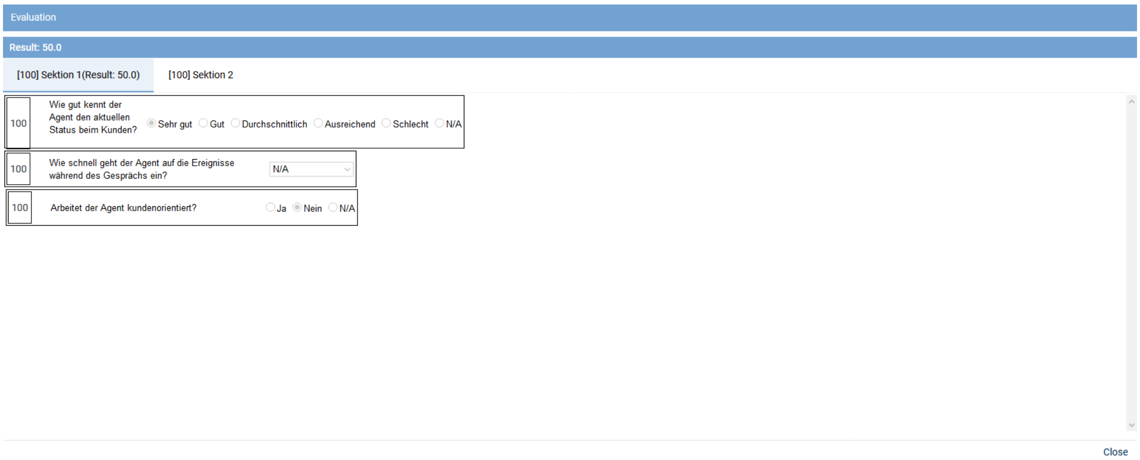


Fig. 40: View evaluation

3. 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.
4. To close the evaluation, click on the button *Close*.

4.1.5 Re-evaluate

Fig. 41: Repeat evaluation

1. Complete the evaluation template accordingly.
2. To change the section in the evaluation template, click on the name of the section above the evaluation area.
3. 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. 68.
4. To apply the evaluation, click on the button *Apply*.
5. Select whether the evaluation is supposed to be released by answering the security prompt with *Yes* or *No*.
6. 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*.

4.1.6 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:

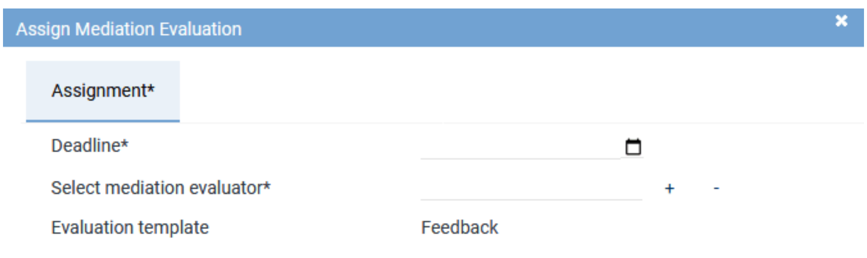


Fig. 42: Assign mediation evaluation

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:

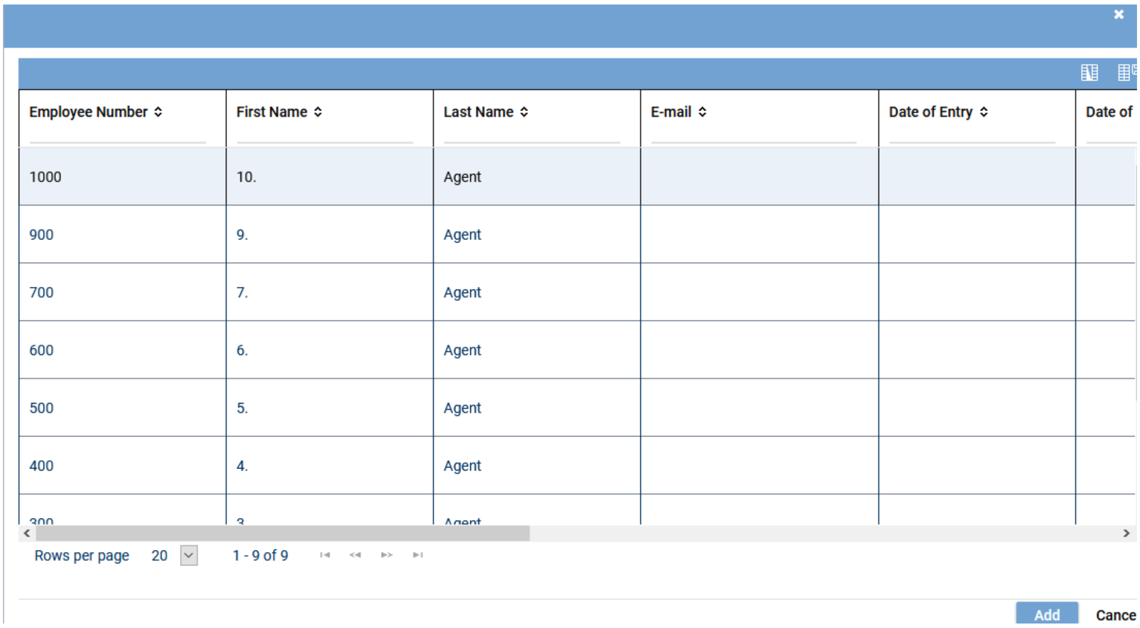


Fig. 43: Add mediation evaluator

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*.

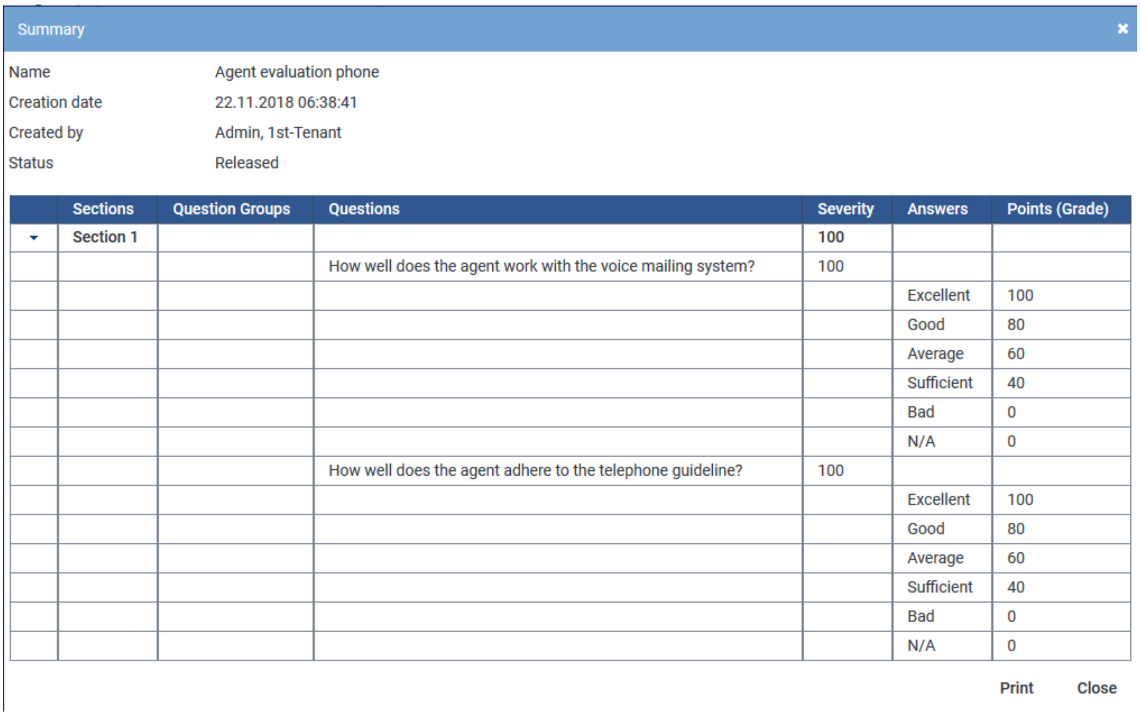
⇨ A new evaluation (mediation evaluation) is created in the Evaluations module.

⇨ The original evaluation is marked as *Obsolete*.

4.1.7 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. 44: Load summary (example)

The following functions are available:

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

4.1.8 Load session

This function allows loading a session that the evaluation has been created for into the Replay module and replaying it there.

1. In the main view, select the evaluation for which you would like to replay the session.
2. Click on the menu item *Evaluations* > *Load* in the toolbar of the main view.
3. Select one of the following options:

Load All	The entire recorded session is loaded into the Replay module. If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module. If a text message has been saved, then the SMS or SDS recording is displayed in a separate window of the Replay module. If a chat recording has been saved, then the chat text is displayed in the Message Viewer of the Replay module. If a camera recording has been saved, then the camera video is displayed in the Video Viewer of the Replay module.
Load Voice Recording	The voice recording of the session is loaded into the Replay module.

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

4. 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. 68.

5 E-Learning module

In the E-Learning module, users can train their skills with provided learning contents.

The following modules are available:

- Training Packages module

  See chapter "Training Packages module", p. 45

- Quiz module

  See chapter "Quiz module", p. 54.

- Coaching Advisor module

  (This module is only available for users who have the right *Coaching Advisor*.)

  See chapter "Coaching Advisor module", p. 60.

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

5.1 Training Packages module

5.1.1 General

In the Training Packages module, training packages can be accepted and edited for training purposes. A training package consists of graphically and textually conditioned learning contents which allow agents to improve their skills.

The display of the Training Packages module consists of a main view (see chapter "Main view", p. 45) and a detail view (see chapter "Detail view", p. 47).

5.1.2 Main view

In the main view, all saved training packages are displayed.

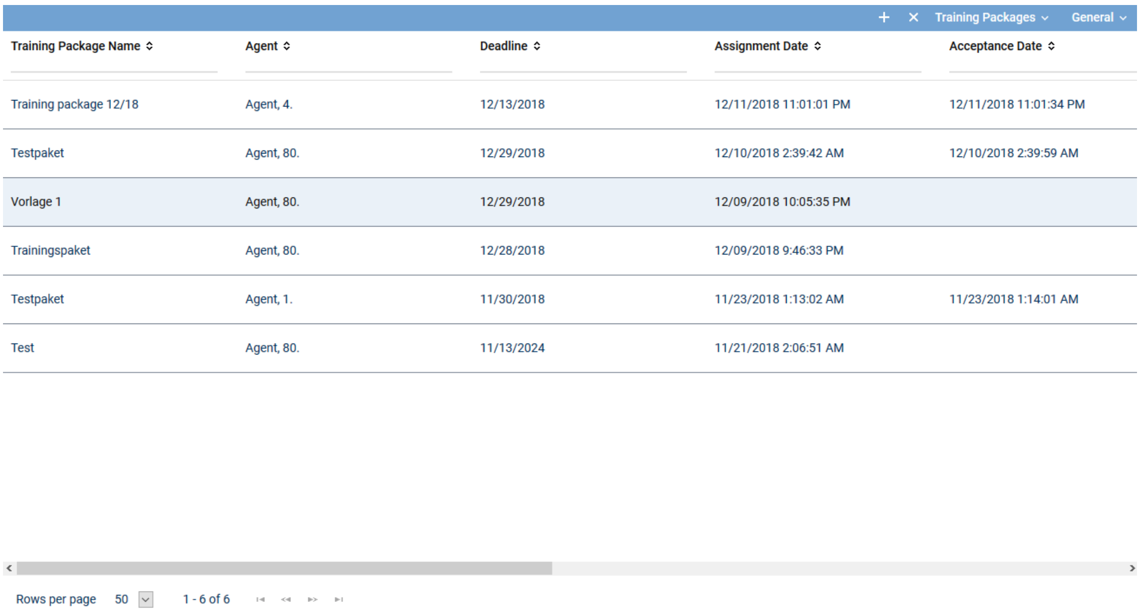


Fig. 45: Training packages - main view (example)

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

Training Package Name	Name of the training package

Agent	Agent who has been assigned this training package
Deadline	Deadline of the training package
Assignment Date	Date on which the training package was assigned
Acceptance Date	Date on which the training package was accepted
Status	Shows the assignment state of the training package. *Assigned* = Training package has been assigned. *Accepted* = Training package has been accepted. *Finished* = Training package has been finished. *Not finished* = Training package has either not been accepted or not been finished until its deadline.
Editing Date	Date on which the training package was edited
Created By	Name of the user who has created the training package
Employee Number of the Creator	Employee number of the user who has created the training package
Creation Date	Date on which the training package was created
Updated	Date on which the training package was updated for the last time

5.1.2.1 Toolbar

The toolbar offers the following functions.

Fig. 46: Toolbar Training Packages module

×	*Delete training package*	Function has been deactivated.
Training Packages	*View Training Package*	Opens the training package (see chapter "View training package", p. 49).
	Accept Training Package	The assigned agent can accept and open the training package with this button (see chapter "Accept training package", p. 50). This option is only available for the person who has been assigned the package.
	Finalize Training Package	The assigned agent can finalize the training package with this button (see chapter "Finalize training package", p. 51). This option is only available for the person who has been assigned the package.
	View Evaluation	Opens the evaluation in which the training package has been created (see chapter "View evaluation", p. 52). This option is only available if the training package has been created in the Evaluations module.
	Load	Loads the session that the training package has been created for into the Replay module for replay (see chapter "Load selected session", p. 53). For information about the functions of the Replay module see chapter "Replay module", p. 68. This option is only active if the training package has been created in the Sessions module.
	Print training package	Prints the selected training package.
General	*Print*	Prints the table of the main view.

Adjust Table	Opens a window in which you can adjust the following settings for the main view: • Displayed information • Order of the displayed columns • Number of rows per page
Search	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. 13. 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	By clicking on the menu item *General Help*, a description of the application you are currently viewing is opened.
Module Help	By clicking on the menu item *Module Help*, 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.

5.1.3 Detail view

The detail view contains additional information about and functions of the selected training package.

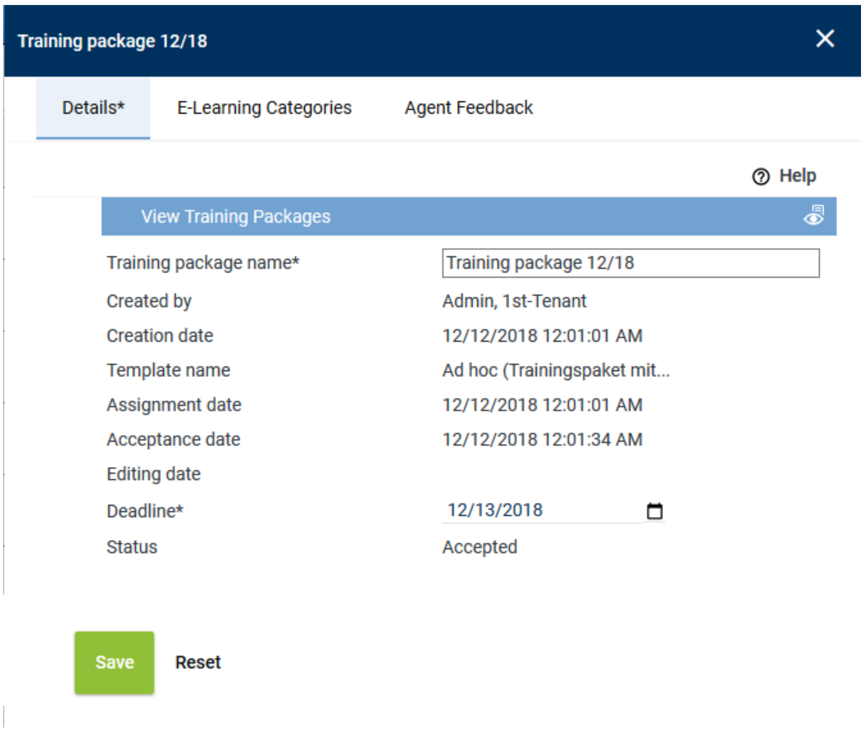


Fig. 47: Training Packages Detail view

The detail view consists of the following tabs:

- *Details*

  Here, you can display detailed information about the selected training package.

  See chapter "Tab Details", p. 48.

- *Categories*

  Here, you can display categories for the training package.

  See chapter "Tab Categories", p. 48
- *Agent Feedback*

  Here, you can enter a feedback about the training package.

  See chapter "Tab Agent Feedback", p. 49.

5.1.3.1 Tab Details

Here, you can display detailed information about the selected training package.

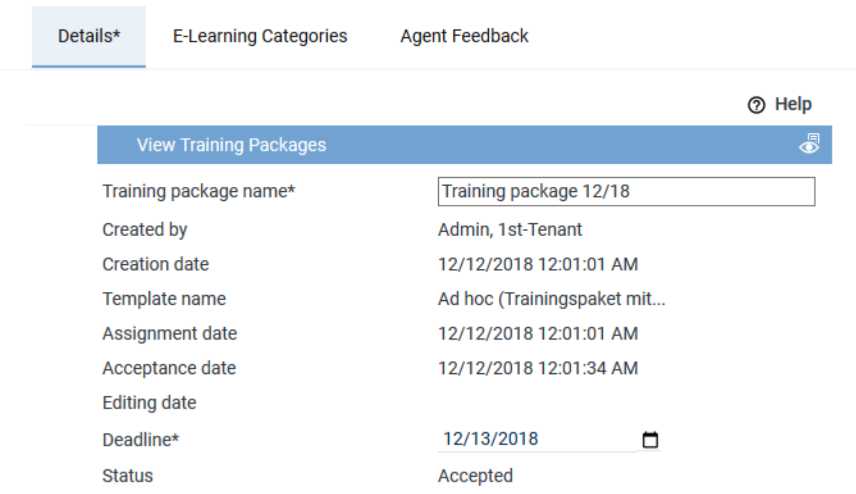


Fig. 48: Tab Details

Training package name	Name of the training package
Created by	Name of the user who has created the training package
Creation date	Date on which the training package was created
Template name	Name of the training package template which has been used or the name of the ad hoc training package.
Assignment date	Date on which the training package was assigned
Acceptance date	Date on which the training package was accepted
Editing date	Date on which the training package was edited
Deadline	Deadline of the training package
Status	Shows the assignment status of the template. *Assigned* = Training package has been assigned. *Accepted* = Training package has been accepted. *Finished* = Training package has been finished. *Not finished* = Training package has either not been accepted or not been finished until its deadline.

	View training package	Opens the training package (see chapter "View training package", p. 49).

5.1.3.2 Tab Categories

Here, you can display and edit the categories of the training package.

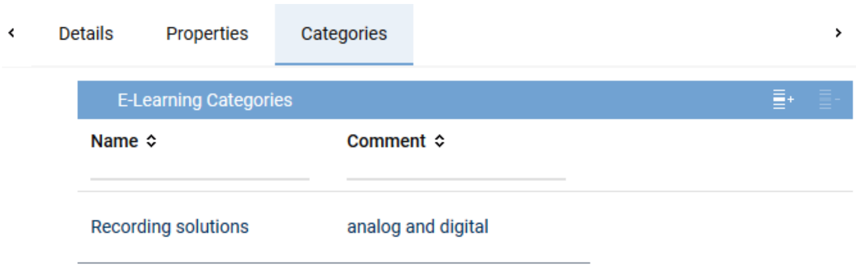


Fig. 49: Tab Categories

	Add	Here, you can add a category. See chapter "Add category", p. 19.
	Remove	Here, you can remove a category. See chapter "Remove category", p. 20.

5.1.3.3 Tab Agent Feedback

Here, the agent can leave a feedback about the training package. This is only possible if the agent has accepted the package and has not finalized it yet.

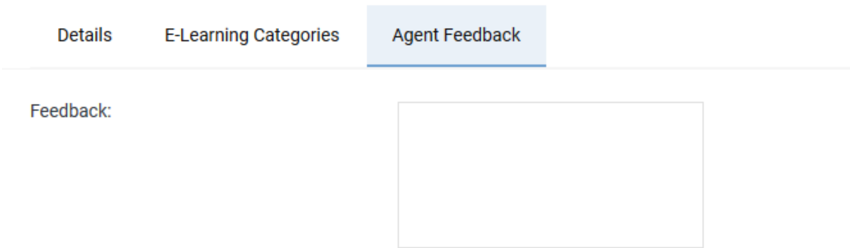


Fig. 50: Enter agent feedback

Feedback:	Here, the agent can enter a feedback about the training package.

5.1.4 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 main view, select the training package you would like to display.

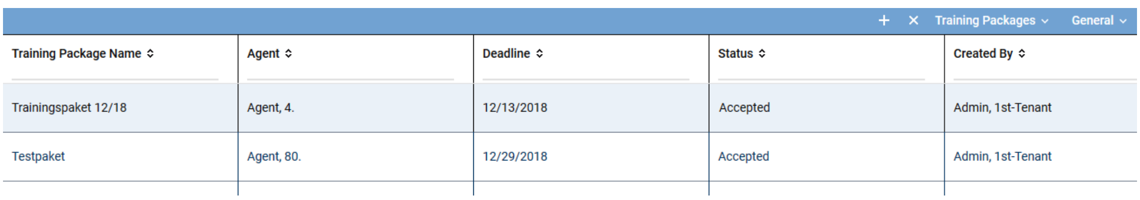


Fig. 51: Select training package (example)

2. Click on the menu item *Training Packages* > *View Training Package* in the toolbar.
   ⇨ The window *Training Package* appears.

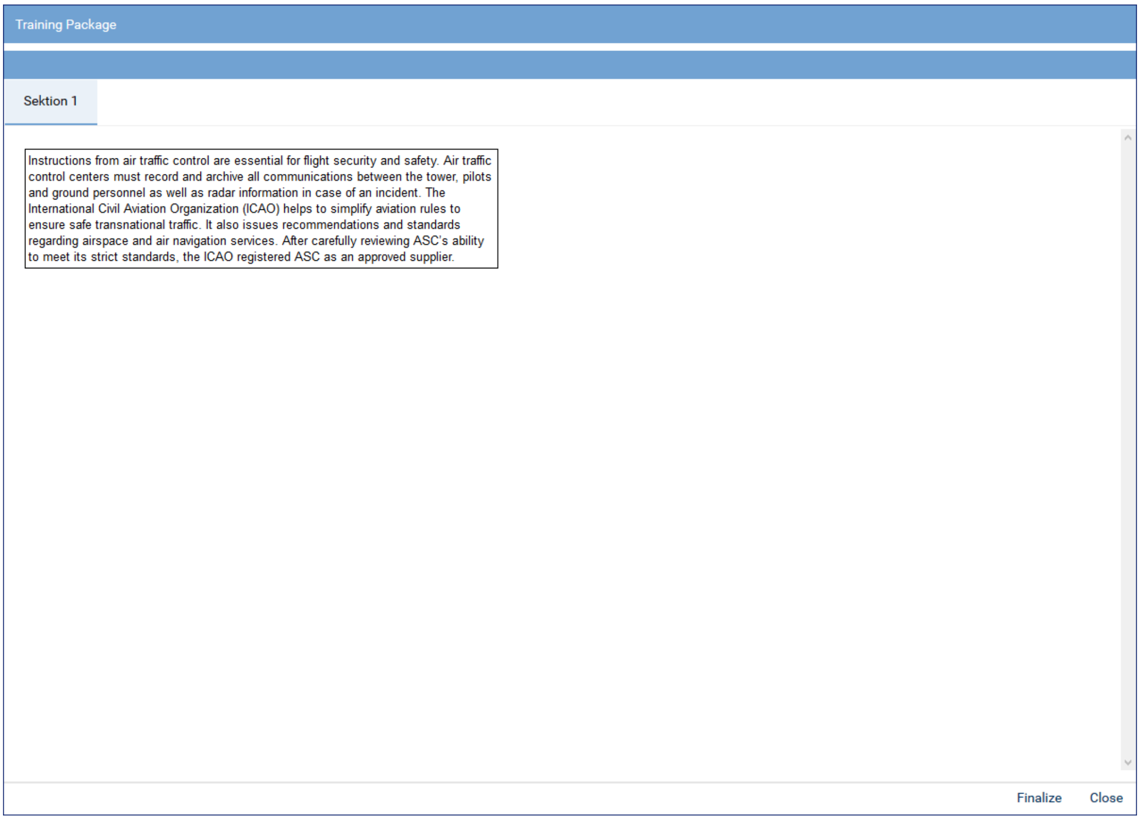


Fig. 52: View training package (example: accepted training package)

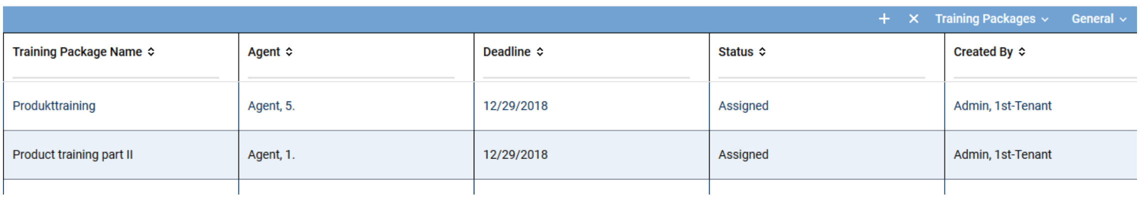
3. Here, you can view the training package.
   To change the section in the training package window, click on the name of the section above the training package area.
4. You have 2 options to finish the training package:

Terminate	The training package is finalized. The button *Finalize* is only visible for the agent who has been assigned the training package. The training package has to be accepted before it can be finalized.
Close	The window *Training Package* is closed. If the training package has been accepted but not finalized yet, it can be viewed again later and finalized then.

5.1.5 Accept training package

A training package can only be accepted by the agent to whom it has been assigned.

1. In the main view, select the training package you would like to accept.



Training Package Name	Agent	Deadline	Status	Created By
Produkttraining	Agent, 5.	12/29/2018	Assigned	Admin, 1st-Tenant
Product training part II	Agent, 1.	12/29/2018	Assigned	Admin, 1st-Tenant

Fig. 53: Select training package (example)

2. Click on the menu item *Training Packages > Accept Training Package* in the toolbar.
   ⇨ The window *Training Package* appears.

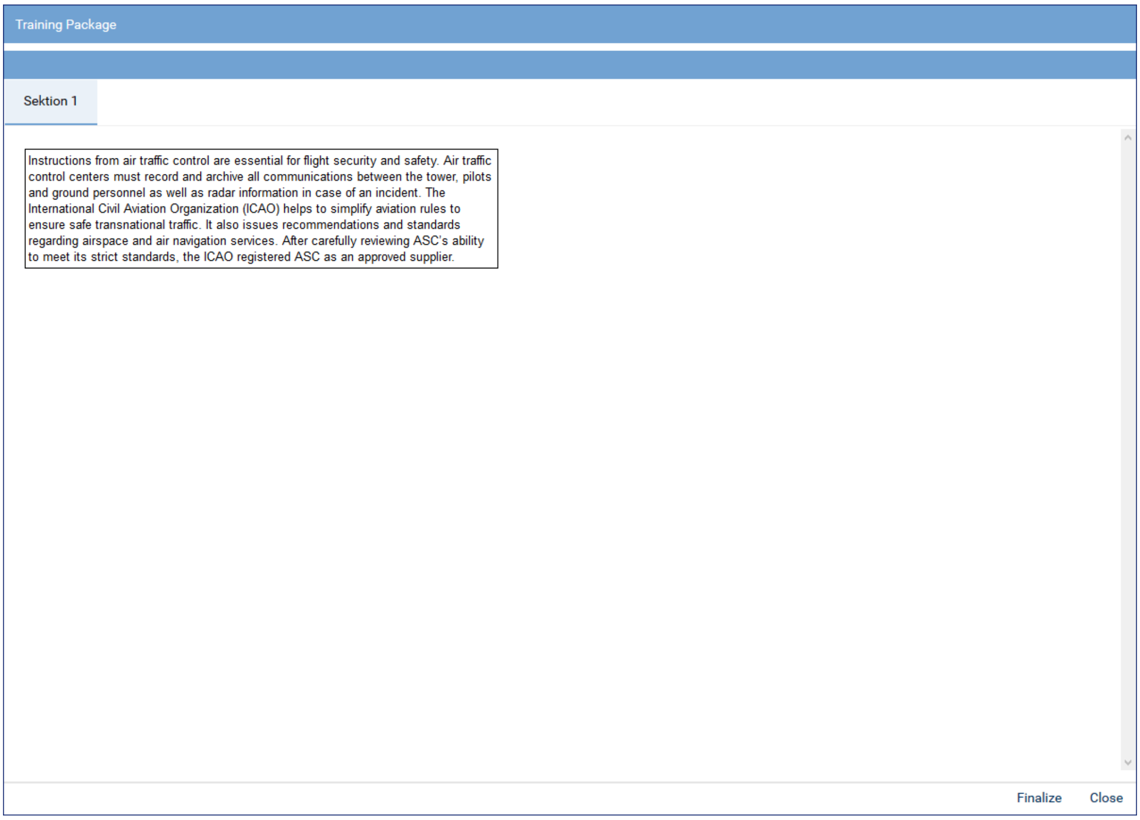


Fig. 54: View training package (example: accepted training package)

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. You have 2 options to finish the training package:

Terminate	The training package is finalized. The button *Finalize* is only visible for the agent who has been assigned the training package. The training package has to be accepted before it can be finalized.
Close	The window *Training Package* is closed. If the training package has been accepted but not finalized yet, it can be viewed again later and finalized then.

5.1.6 Finalize training package

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

A training package can only be finalized after it has been accepted (see chapter "Accept training package", p. 50).

A training package can also be finalized directly upon accepting it in the open window *Training Package*.

1. In the main view, select the training package you would like to finalize.

Training Package Name	Agent	Deadline	Status	Created By
Trainingspaket 12/18	Agent, 4.	12/13/2018	Accepted	Admin, 1st-Tenant
Testpaket	Agent, 80.	12/29/2018	Accepted	Admin, 1st-Tenant

Fig. 55: Select training package (example)

2. Click on the menu item *Training Packages > Finalize Training Package* in the toolbar.

5.1.7 View evaluation

This option is only available if the training package has been created and assigned in *Quality Management > Evaluations*.

This function allows viewing the evaluation of a training package created in the Evaluations module.

1. In the main view, select the training package the evaluation of which you would like to display.

Training Package Name	Agent	Deadline	Created By	Assignment Date
Produkttraining	Agent, 5.	12/29/2018	Admin, 1st-Tenant	12/12/2018 12:23:31 AM
Product training part II	Agent, 1.	12/29/2018	Admin, 1st-Tenant	12/12/2018 12:21:27 AM

Fig. 56: Select training package (example)

2. Click on the menu item *Training Packages > View Evaluation* in the toolbar.
   ⇨ The window *Evaluation* appears.

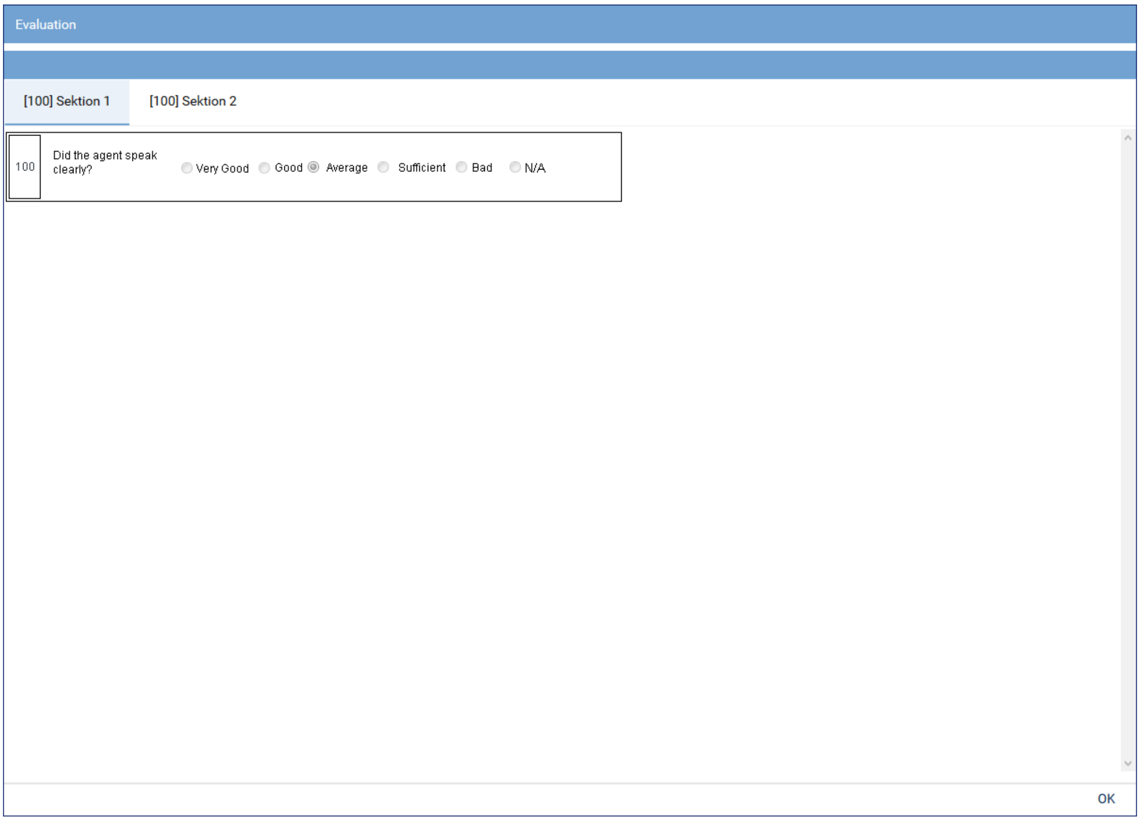


Fig. 57: Evaluations

3. 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.
4. To close the window, click on the button *OK*.

5.1.8 Load selected session

This option is only active if the training package has been assigned/created in the Sessions module.

This function allows loading a session that the training package has been created for into the Replay module and replaying it there.

1. In the main view, select the training package for which you would like to replay the session.
2. Click on the menu item *Training Packages* > *Load* or *Coaching Advisor* > *Load* in the toolbar.
3. Select one of the following options:

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

4. 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. 68.

5.2 Quiz module

5.2.1 General

The Quiz module can be used to check the agents' current level of knowledge.

The Quiz module consists of a main view (see chapter "Main view", p. 54) and of a detail view (see chapter "Detail view", p. 55).

5.2.2 Main view

In the main view, all assigned quizzes are displayed.

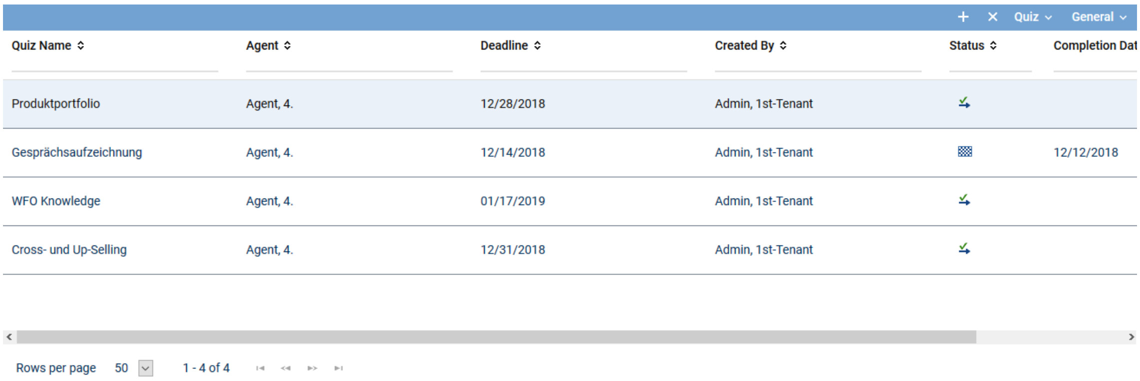


Fig. 58: Quiz - main view (example)

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

Quiz Name	Name of the quiz.
Agent	Name of the agent who has been assigned the quiz.
Deadline	Date on which the quiz has to be finalized.
Status	Shows the editing status of the quiz. *(Assigned)* = Quiz has been assigned. *(Started)* = Quiz has been started. *(Finished)* = Quiz has been finished. *(Not finished)* = Quiz has either not been started or not been finished until its deadline.
Created By	Name of the user who has created and assigned the quiz.
Creation Date	Date on which the quiz was saved.
Updated	Date on which the quiz was updated the last time.
Completion Date	Date on which the quiz was completed.

5.2.2.1 Toolbar

The toolbar offers the following functions.

Fig. 59: Toolbar Quiz module

	*Delete*	Function has been deactivated.
Quiz	*View*	Opens a window in which you can see the result of the selected quiz (see chapter "View quiz", p. 58). This function is only available for finalized quizzes. To be able to view the quiz results, you additionally have to have the respective right. The rights *Show results to superior* and *Show results to agent* are configured during the assignment of a quiz (see Tab Details).
	Start	Starts the selected quiz (see chapter "Start quiz", p. 59).
	Print Quiz	Prints the selected quiz.
General	*Print*	Prints the table of the main view.
	Adjust Table	Opens a window in which you can adjust the following settings for the main view: • Displayed information • Order of the displayed columns • Number of rows per page.
	Search	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. 13. 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	By clicking on the menu item *General Help*, a description of the application you are currently viewing is opened.
	Module Help	By clicking on the menu item *Module Help*, 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.

5.2.3 Detail view

The detail view contains additional information about and functions of the selected quiz.

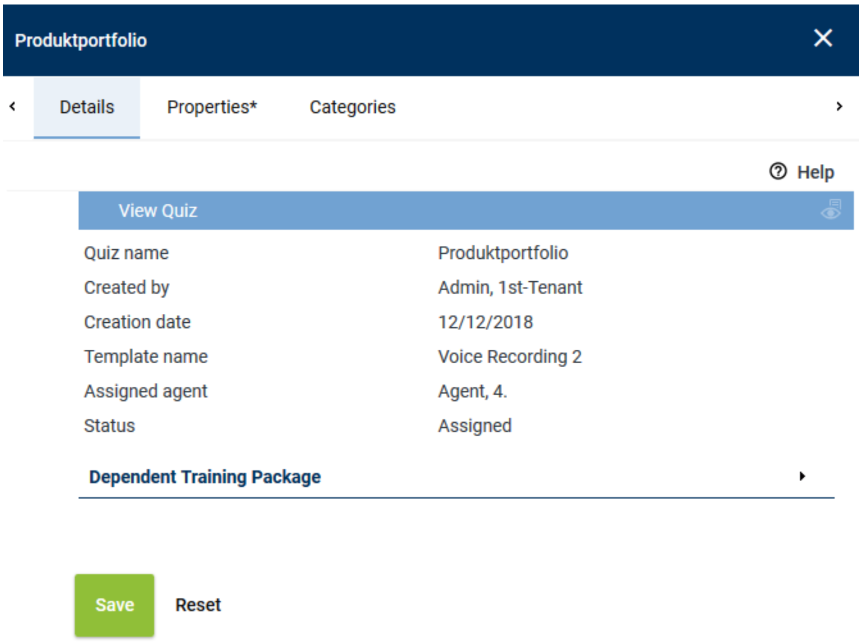


Fig. 60: Quiz - detail view

The detail view consists of the following tabs:

- *Details*

  Here, you can view detailed information about the selected quiz.

  See chapter "Tab Details", p. 56.
- *Properties*

  Here, you can display and edit the properties of the selected quiz.

  See chapter "Tab Properties", p. 57.
- *Categories*

  Here, you can add or remove categories.

  See chapter "Tab Categories", p. 58

5.2.3.1 Tab Details

Here, you can view detailed information about the selected quiz.

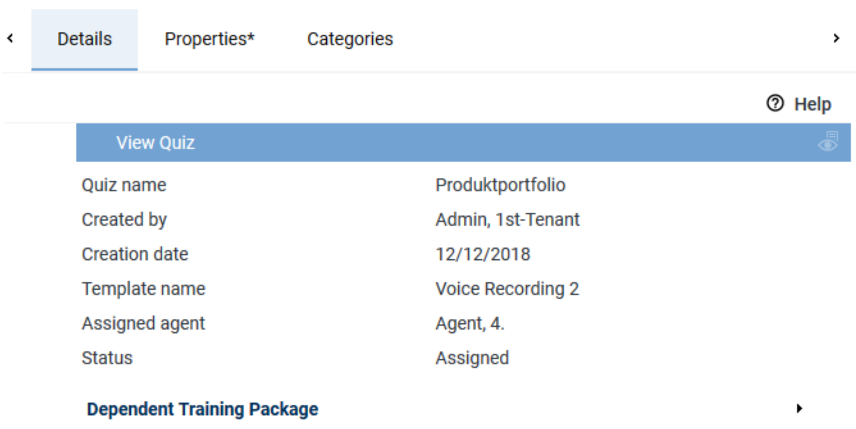


Fig. 61: Tab Details

Quiz name	Name of the quiz.
Created by	Name of the user who has assigned the quiz test.
Creation date	Date on which the quiz was saved.
Template name	Name of the quiz template.
Assigned agent	Name of the agent who has been assigned the quiz.
Status	Shows the processing status of the quiz test. *Assigned* = Quiz has been assigned. *Started* = Quiz has been started. *Finished* = Quiz has been finished. *Not finished* = Quiz has either not been started or not been finished until its deadline.
Completion date	Date on which the quiz was completed.
Duration	Time needed for the quiz test. To display the time, the quiz test has to have been started or finalized.
Result	Result of the quiz test. The result of the quiz test can only be viewed if the appropriate right has been selected during the assignment of the quiz test.

Group field Dependent Training Package

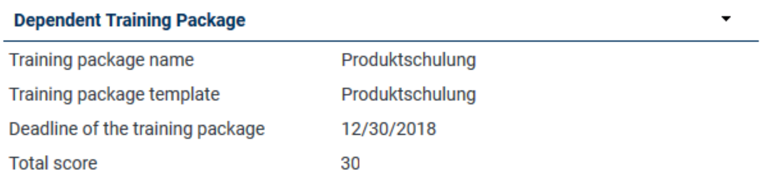


Fig. 62: Group field Dependent Training Package

Training package name	Name of training package
Training package template	Name of the training package template.
Deadline of the training package	Date on which the training package has to be finalized.
Total score	Total score of the quiz test.

5.2.3.2 Tab Properties

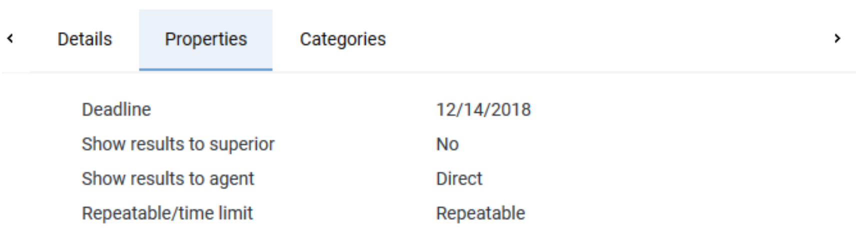


Fig. 63: Tab Properties

Deadline	Shows the date on which the quiz has to be finalized.
Show results to superior	Shows whether the results are visible for the superior.

	Yes = Results are visible for the superior. *No* = Result are not visible for the superior.
Show results to agent	Shows whether the results are visible for the agent. • *Never* = The results are not visible for the agent. • *Directly* = The results are visible for the agent in a pop-up window after completing the quiz test. • *Deadline* = The results are visible for the agent after the entered deadline.
Repeatable/time limit	Shows whether the quiz is repeatable. • *Not repeatable* = The quiz is not repeatable. • *Repeatable* = The quiz can be repeated as often as necessary before the deadline. Shows whether there is a time limit for the completion of the quiz. • *No time limit* = There is no time limit for the completion of the quiz. • *Time limit* = There is a time limit for the completion of the quiz.

5.2.3.3 Tab Categories

Here, you can display categories.

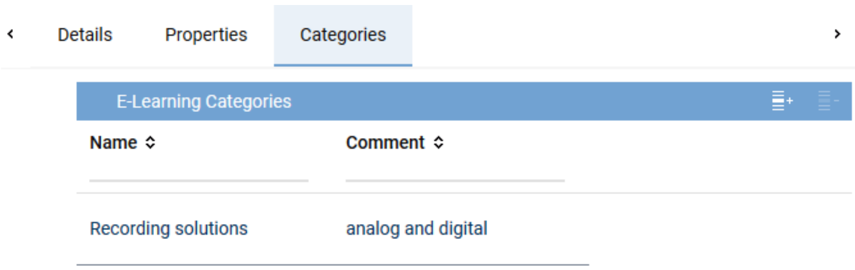


Fig. 64: Tab Categories

5.2.4 View quiz

A quiz can only be viewed if the appropriate right has been selected during the assignment of the quiz test.

The quiz can only be displayed if it has been completed.

1. In the main view, select the quiz you would like to display.
2. Click on the menu item *Quiz* > *View* in the toolbar.

   ⇨ The window *Quiz* appears.

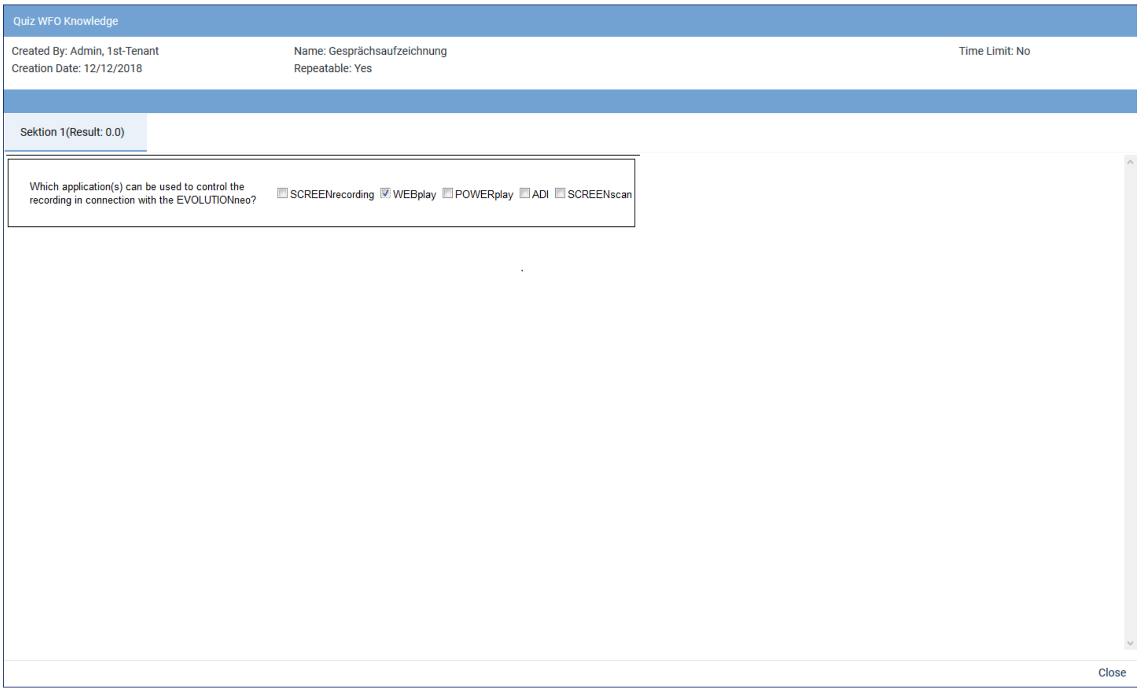


Fig. 65: View quiz (example)

3. To change the section in the quiz, click on the name of the section above the quiz area.
4. To close the window *Quiz*, click on the button *Close*.

5.2.5 Start quiz

1. In the main view, select the quiz you would like to start.
2. Click on the menu item *Quiz* > *Start* in the toolbar.
   ⇨ The window *Quiz* appears.
   If a time limit has been activated, a countdown of the remaining time is displayed in top right corner of the window *Quiz*.

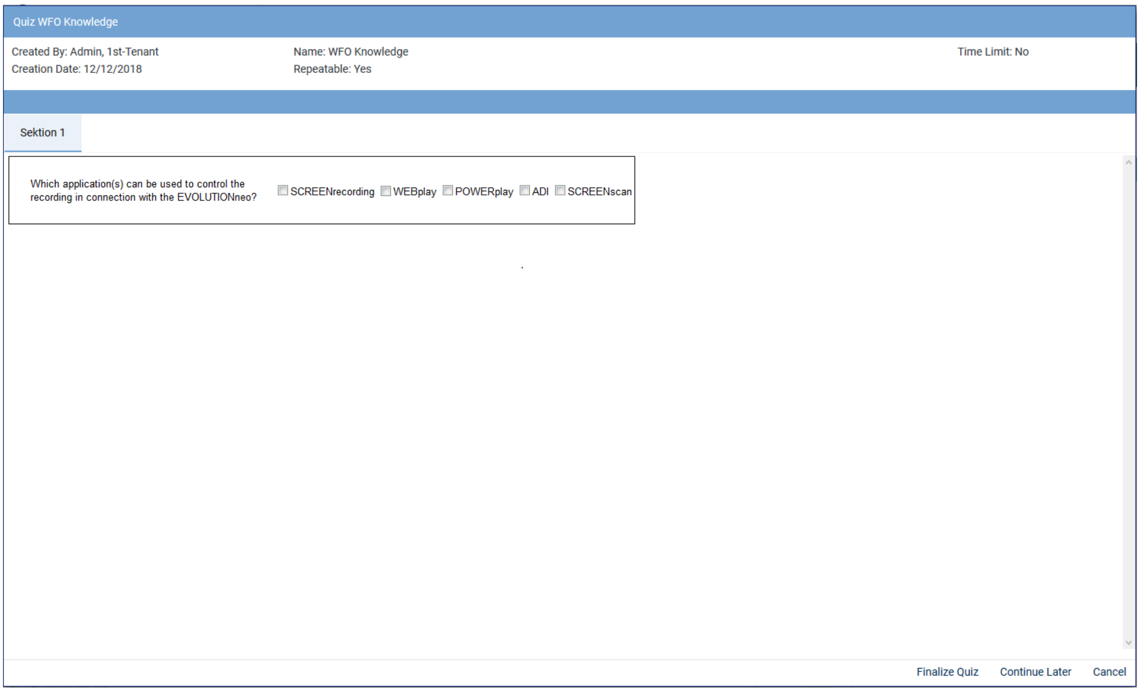


Fig. 66: Quiz (example)

3. Answer the questions of the quiz.
   To change the section in the quiz, click on the name of the section above the quiz area.
4. Finalize the quiz by clicking on one of the following buttons:

Finalize Quiz	The quiz is finalized and assessed.
Continue Later	The entries are saved. You can continue working on the quiz at a later moment. **NOTICE!** If a time limit has been selected for the quiz, the button is not available.
Cancel	The quiz is canceled. The entries are not saved. You can start the quiz once again at a later moment. **NOTICE!** If a time limit has been selected for the quiz, the button is not available.

5.3 Coaching Advisor module

5.3.1 General

The Coaching Advisor module contains sessions which can exclusively be used as training material. Sessions cannot be evaluated in this module.

In the Coaching Advisor module, training sessions and coaching advisor sessions are displayed.

Coaching advisor sessions (CA sessions):

CA sessions are recorded by means of the application CLIENT*command*, see user manual *CLIENTcommand*. They are displayed in the Coaching Advisor module only and can only be replayed there, too. CA sessions allow agents to simulate conversation scenarios among each other and record them as exemplary sessions. These sessions are subsequently available in the Coaching Advisor module. CA sessions are used exclusively as personal training material and are therefore filtered from all other modules which process and display sessions. They are only visible for the agent who has recorded the sessions and for users with the authorization *Can see all coaching advisor sessions*. In contrast to the training sessions, CA sessions are not available for evaluation.

CA sessions can only be recorded by agents who have the right *Coaching Advisor*.

Training sessions

Training sessions are actual sessions which have been tagged by a supervisor as training sessions in the Sessions module and assigned to one or several agents, see user manual *INSPIRATIONneo Sessions module*. These sessions are copied into the Coaching Advisor module and are visible for those agents only to whom they have been assigned.

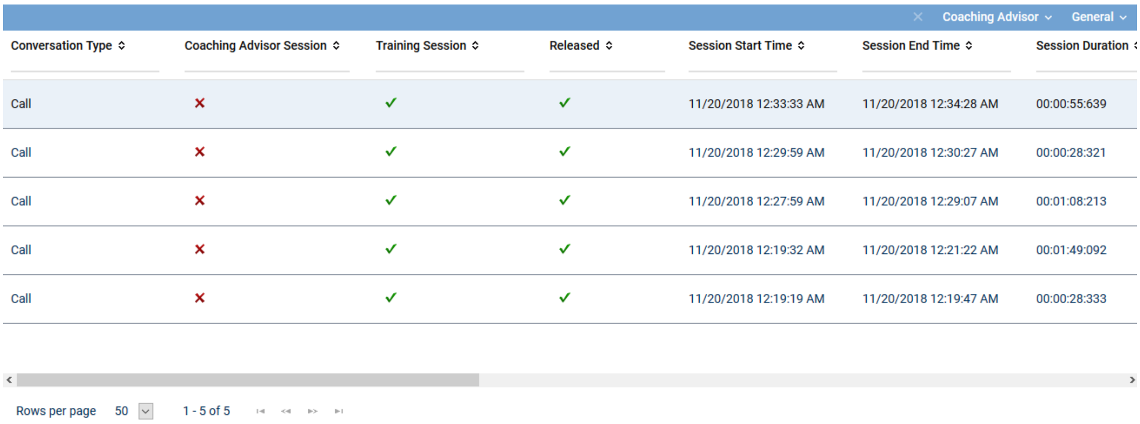
It holds true for both session types that:

If agents have the required function rights, they can make their own CA sessions and training sessions available to other users, too, see chapter "Release session", p. 66.

Open the Coaching Advisor module by clicking on the sub-menu item *Coaching Advisor* in the menu item E-Learning module in the navigation bar.

5.3.2 Main view

In the main view, all available CA sessions and training sessions are displayed.



Conversation Type	Coaching Advisor Session	Training Session	Released	Session Start Time	Session End Time	Session Duration
Call	✗	✓	✓	11/20/2018 12:33:33 AM	11/20/2018 12:34:28 AM	00:00:55:639
Call	✗	✓	✓	11/20/2018 12:29:59 AM	11/20/2018 12:30:27 AM	00:00:28:321
Call	✗	✓	✓	11/20/2018 12:27:59 AM	11/20/2018 12:29:07 AM	00:01:08:213
Call	✗	✓	✓	11/20/2018 12:19:32 AM	11/20/2018 12:21:22 AM	00:01:49:092
Call	✗	✓	✓	11/20/2018 12:19:19 AM	11/20/2018 12:19:47 AM	00:00:28:333

Fig. 67: Coaching Advisor - main view (example)

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

Conversation type	Displays the type of the conversation. = call (only audio) = work item (only video) = text
Coaching Advisor Session	Shows whether the session is a coaching advisor session. This session is only visible in the Coaching Advisor module. ✓ = coaching advisor session ✗ = not a coaching advisor session
Training Session	Shows whether the session is a training session. This session has been defined as a training session in the Sessions module and copied into the Coaching Advisor module. ✓ = training session ✗ = no training session
Released	Shows whether the session is visible for other users and whether it has been released for replay. ✓ = released ✗ = not released
Session Start Time	Start time of the session
Session End Time	End time of the session
Session Transfers	Number of session transfers
Session Duration	Duration of the session
Call Direction	Call direction of the session = incoming = outgoing = unknown
Conversation Direction	Conversation direction of the session. • *Internal* • *Unknown*
Agent	Name of the agent who has recorded the session.
Comment	Shows the comments about the session in text.

Hold Time	Shows how long the caller was "on hold".
Wrap-up Time	Time needed for the post-editing.
Creation Date	Date on which the session was saved.
Updated	Date on which the session was updated for the last time.

5.3.2.1 Toolbar

The toolbar offers the following functions.

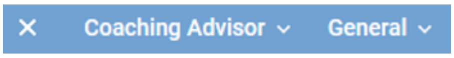


Fig. 68: Coaching Advisor module - toolbar

	*Delete*	Deletes the selected session. A coaching advisor session can only be deleted if it has been released and if the user has the function right *Can administrate own CA sessions* or *Can administrate all CA sessions*. Training sessions are created in the Sessions module and can only be deleted there, too.
Coaching Advisor	*Load*	Loads the selected session into the Replay module for replay. See chapter "Load session", p. 65. For information about the functions of the Replay module see chapter "Replay module", p. 68.
	Release Session	The selected session is released and can thus be replayed (see chapter "Release session", p. 66).
	Lock Session	The selected session is locked and thus cannot be replayed (see chapter "Lock session", p. 66).
General	*Print*	Prints the table of the main view.
	Adjust Table	Opens a window in which you can adjust the following settings for the main view: • Displayed information • Order of the displayed columns • Number of rows per page
	Search	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. 13. 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	By clicking on the menu item *General Help*, a description of the application you are currently viewing is opened.
	Module Help	By clicking on the menu item *Module Help*, 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.

5.3.3 Detail view

The detail view contains additional information about and functions of the selected session.

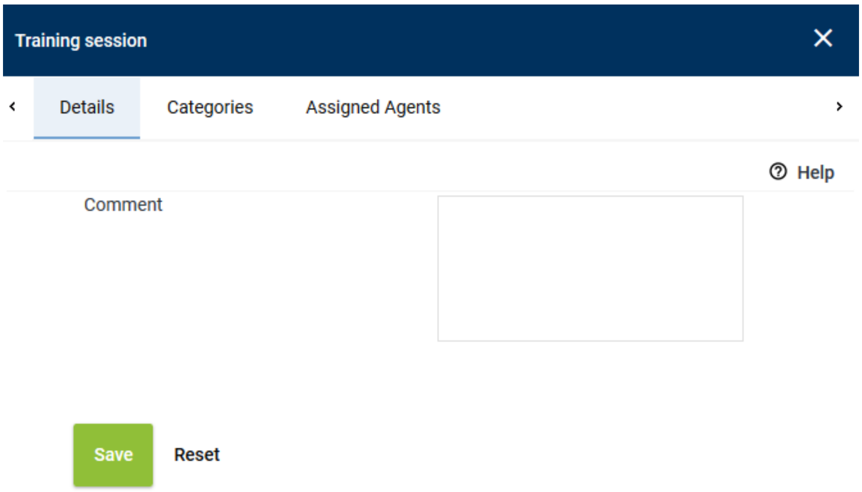


Fig. 69: Coaching Advisor module - detail view

The detail view consists of the following tabs:

- *Details*

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

  See chapter "Tab Details", p. 63.
- *Categories*

  Here, you can assign training or session categories to the selected session.

  See chapter "Tab Categories", p. 63
- *Assigned Agents* (only in training sessions)

  Here, you can see which agents have been assigned to the selected session. This tab is available for training sessions only and only visible for users with the authorization *Can see training sessions*.

  See chapter "Tab Assigned Agents", p. 65.

5.3.3.1 Tab Details

Here, you can display a comment for the session.

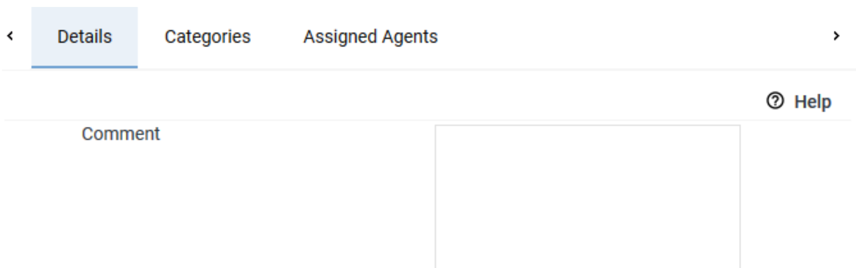


Fig. 70: Tab Details

5.3.3.2 Tab Categories

Here, you can display and edit the categories of the session.

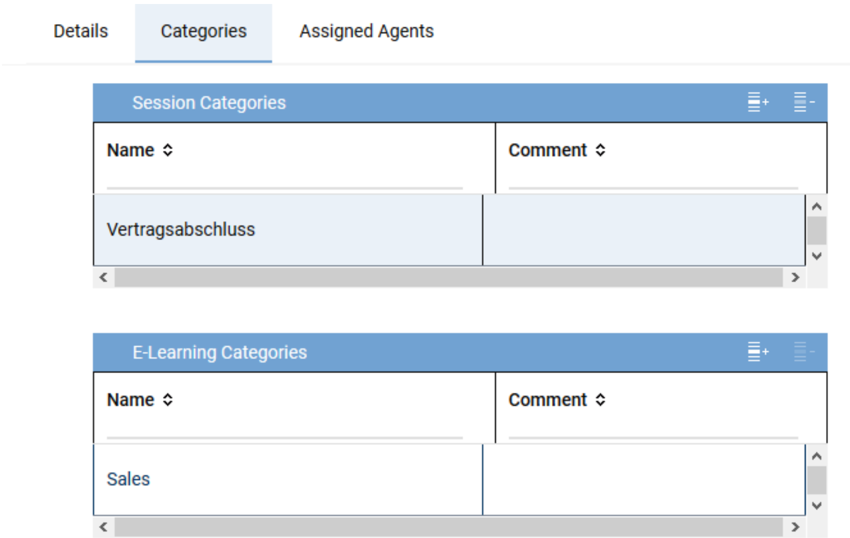


Fig. 71: Tab Categories

Here, you can assign session categories and training categories to the session.

	Add	Opens a window in which you can add new categories (see chapter "Assign category", p. 64).
	Remove	Removes the selected category from the list.

5.3.3.2.1 Assign category

1. To assign categories, click on the icon *(Add)*.

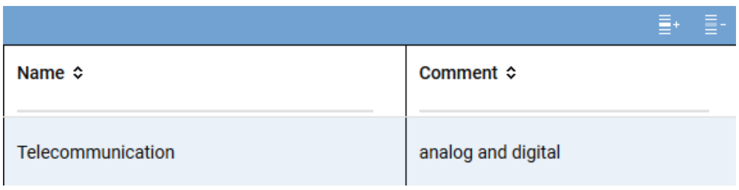


Fig. 72: Add categories

2. 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.

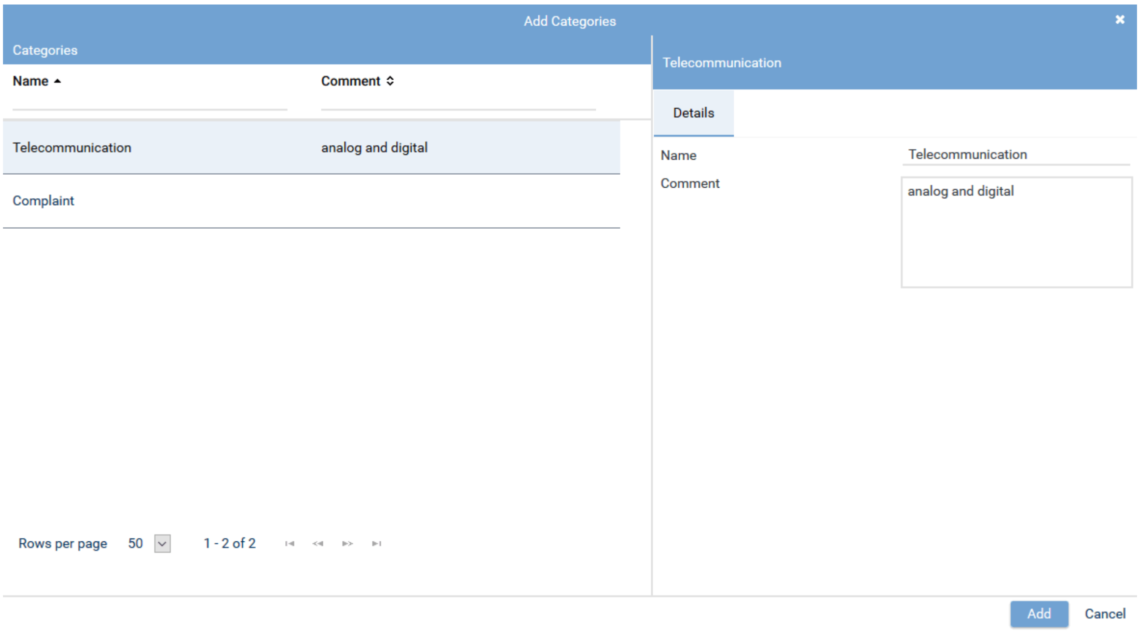


Fig. 73: Select categories

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

5.3.3.3 Tab Assigned Agents

Here, you can see which agents have been assigned to the session. Agents can only be assigned to sessions in the Sessions module.

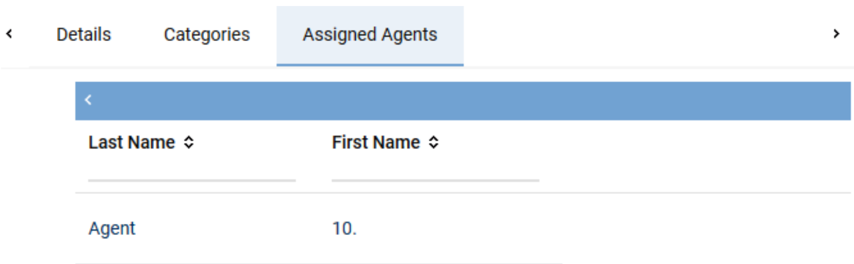


Fig. 74: Tab Assigned Agents

5.3.4 Load session

This function allows loading sessions into the Replay module and replaying them there.

1. In the main view, select the session you would like to replay.
2. Click on the menu item *Training Packages* > *Load* or *Coaching Advisor* > *Load* in the toolbar.
3. Select one of the following options:

Load All	The entire recorded session is loaded into the Replay module. If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module. If a text message has been saved, then the SMS or SDS recording is displayed in a separate window of the Replay module.

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

4. 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. 68.

A conversation can also be loaded into and replayed in the Replay module by double-clicking on the element in the main view.

5.3.5 Release session

To be able to release a locked session, you have to have the respective right.

This function allows releasing a locked session for other users.

1. In the main view, select the session you would like to release.
2. Click on the menu item *Coaching Advisor* > *Release Session* in the toolbar.

⇨ The session is visible for all users who have at least one function right to administrate or see CA sessions or training sessions.

If a CA session has been created or released, an internal notification is sent to all users who are allowed to access the Coaching Advisor module. The message is displayed in the Notifications module of the application Portal.

Every user who can see the session has the right to lock the session again, see chapter "Lock session", p. 66.

5.3.6 Lock session

To be able to lock a released session, you have to have the respective right.

This function allows locking a released session. If you lock a session, it remains visible for the users but it cannot be replayed anymore.

1. In the main view, select the session you would like to lock.
2. Click on the menu item *Coaching Advisor* > *Lock Session* in the toolbar.

⇨ The session cannot be replayed by other users anymore.

Every user who can see the session has the right to release the session again, see chapter "Release session", p. 66.

6 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. 81. 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. 83.

Fig. 75: Welcome screen (example)

1	Replay bar	Shows the loaded conversations, see chapter "Replay bar", p. 68.
2	Functionality bar	Contains functionalities for the loaded conversations in the replay bar, see chapter "Functionality bar", p. 71.

6.1 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).

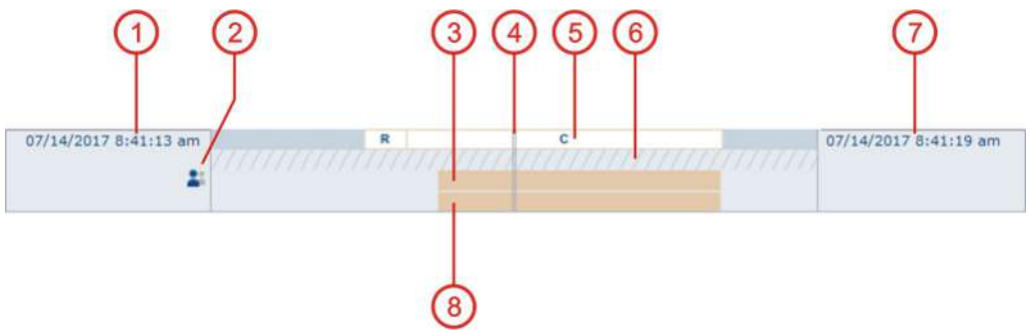


Fig. 76: Replay bar in the full view

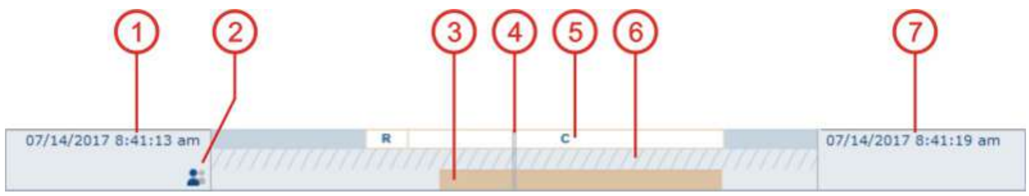


Fig. 77: Replay bar in compressed view

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. 70.
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: • 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. 70.

6.1.1 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.

6.1.2 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.

6.1.3 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.

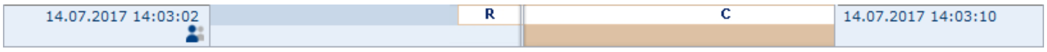


Fig. 78: Meta data loaded completely

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

   ⇨ The conversation cannot be replayed.

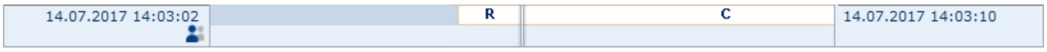


Fig. 79: Meta data for the recording is missing

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

   ⇨ The conversation cannot be replayed.

Fig. 80: 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.

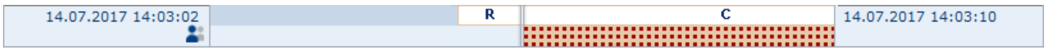


Fig. 81: Missing packet in the meta data of the recording (full view)

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.

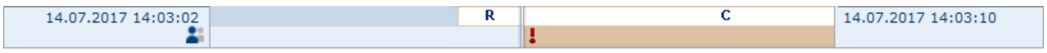


Fig. 82: Defective or missing packet in the meta data of the recording (compressed view)

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.

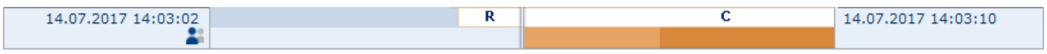


Fig. 83: Data buffer empty/loaded

7. Red = Data buffer not loaded completely.

   ⇨ The conversation is defective and cannot be replayed.

Fig. 84: 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.

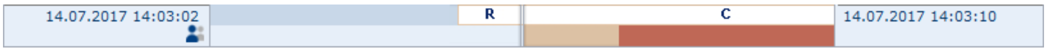


Fig. 85: Data buffer not loaded completely

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. 86: 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.

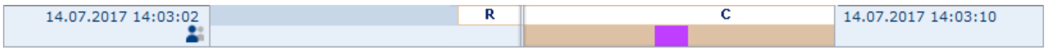


Fig. 87: Conversation section muted

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

Fig. 88: The recording contains data which is not supported.

6.1.4 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.

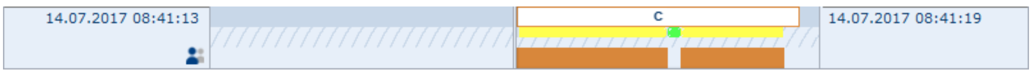


Fig. 89: Emotions detected in a conversation (example)

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.

6.2 Functionality bar

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

6.2.1 Icons

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

	Play/Pause	Starts the replay.
		Pauses the replay.
	Stop	Stops the replay.
	Rewind	Jumps back 5 seconds from the current replay position.
	Back	Jumps to the start of the current or of the previous conversation.
	Fast-forward	Jumps ahead 5 seconds from the current replay position.
	Next	Jumps to the start of the next conversation.
	Lock element	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.
	Reconnect to the replay component	Refreshes the server connection.
	Display video window	Shows the Video Viewer in the main view of the application.
	Hide video window	Shows the main view of the application. The Video Viewer integrated into the main view is hidden.
	Detach Video Viewer	Displays the Video Viewer in its own window.
	Attach Video Viewer	Closes the window of the Video Viewer.
	Unmute/Mute	Shows that the speaker for the conversation has been activated.
		Shows that the speaker for the conversation has been deactivated.
	Volume	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.
	Clear playlist	Removes all loaded conversations from the Replay module.
	Export all loaded elements	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. 74.
	Create new bookmark	Sets a bookmark or marks the beginning of a conversation section at the current replay position, see chapter "Create new bookmark", p. 76.
		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. 76.
	Create new mute notification	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. 78.
		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. 78.
AB	*Loop*	Marks the beginning of a replay loop at the current replay position, see chapter "Mark replay loop", p. 80.
AB		Marks the end of a replay loop at the current replay position, see chapter "Mark replay loop", p. 80.
AB		Removes the taggings of the replay loop, see chapter "Mark replay loop", p. 80.
	Skip silence	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.
1.0		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 *Reduce replay speed*. To increase the replay speed, click on the icon *Increase replay speed*.
	Replay via phone	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.

6.2.2 Export all loaded elements

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

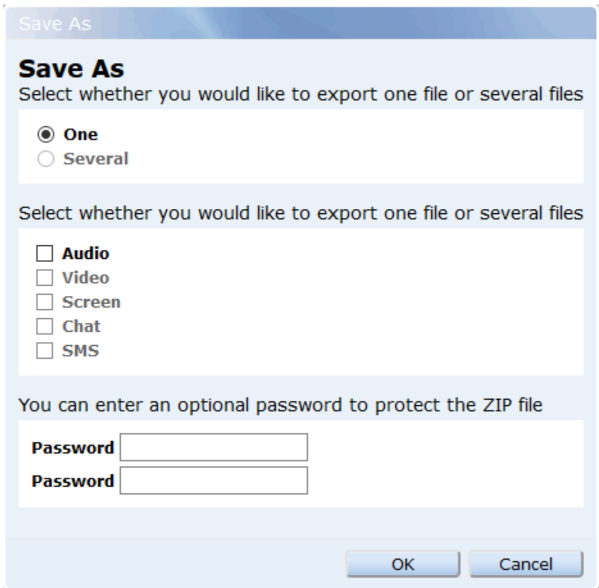


Fig. 90: Save as

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

Single	Mixes all recordings of one or several conversations in one file.
Several	Creates its own file for each recording to be saved.

Audio	Saves the audio data.
Video	Saves the video data.
Screen	Saves the screen recordings.
Chat	Saves a chat text.
SMS	Saves the SMS data.

Password	Protects the ZIP file with a password.

3. Click on the button *OK*.

   ⇨ The following window appears:

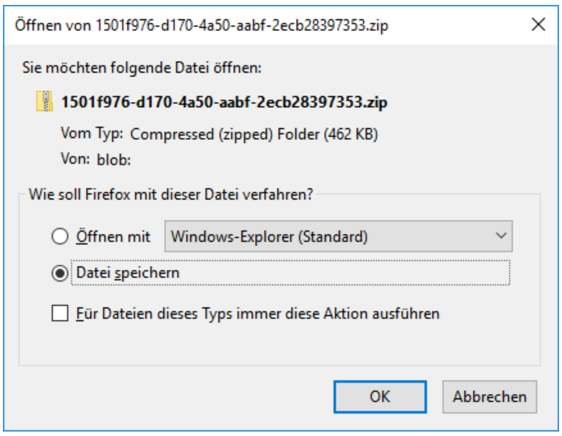


Fig. 91: Save conversations

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).

6.2.3 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.

6.2.3.1 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:

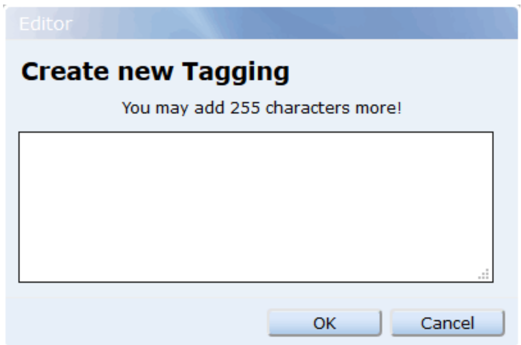


Fig. 92: Tagging editor

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

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

Fig. 93: Tagging editor with entered comment (example)

4. To save the entries, click on the button *OK*.

⇨ The tagged conversation section is displayed in ocher color above the replay bar.

⇨ When replaying the conversation, the information details are displayed in the area of the tagging.

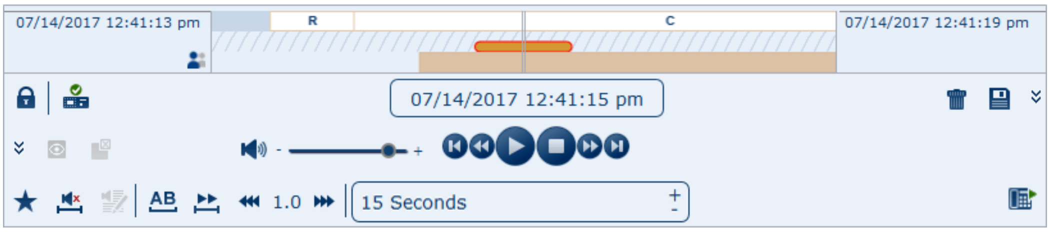


Fig. 94: Conversation with tagged conversation section (example)

Fig. 95: Displayed information details (example)

6.2.3.2 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. 96: Displayed information details (example)

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

   ⇨ The following window appears:

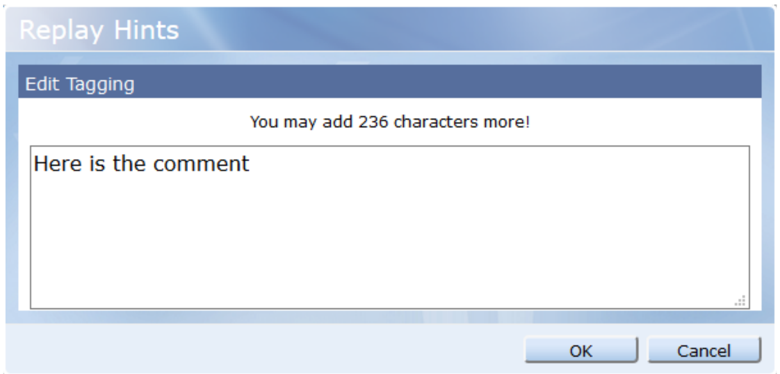


Fig. 97: Edit tagging (example)

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*.

6.2.3.3 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. 98: Displayed information details (example)

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

6.2.4 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.

6.2.4.1 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:

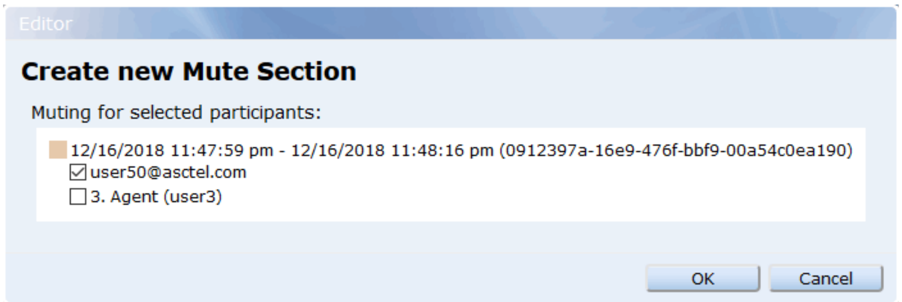


Fig. 99: Muting for selected participants (example)

OK	Saves the entries and closes the window.
Cancel	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.

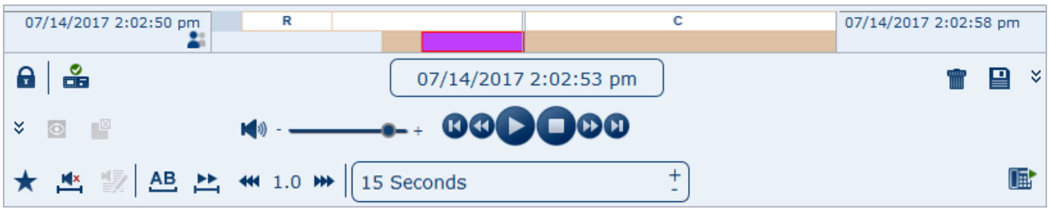


Fig. 100: Conversation with muted conversation section (example)

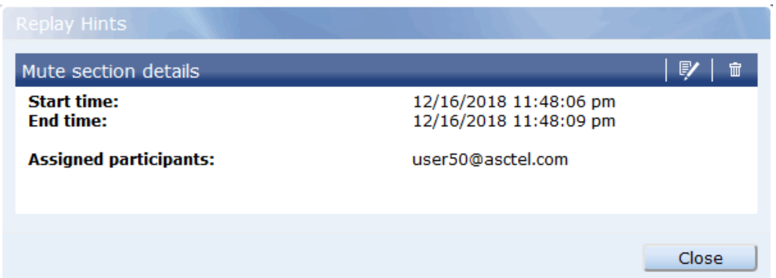


Fig. 101: Displayed mute section details (example)

6.2.4.2 Edit muted conversation section

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

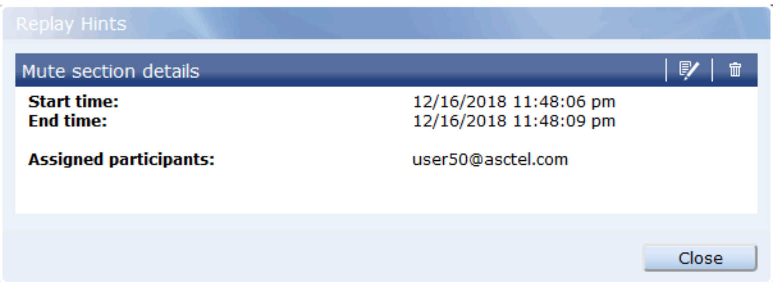


Fig. 102: Mute Section Details (example)

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

   ⇨ The following window appears:

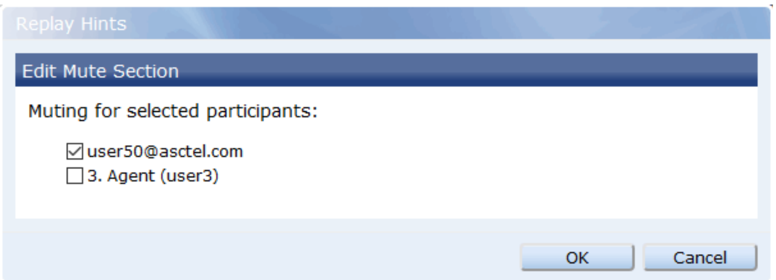


Fig. 103: Edit mute section (example)

OK	Saves the entries and closes the window.
Cancel	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*.

6.2.4.3 Delete muted conversation section

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

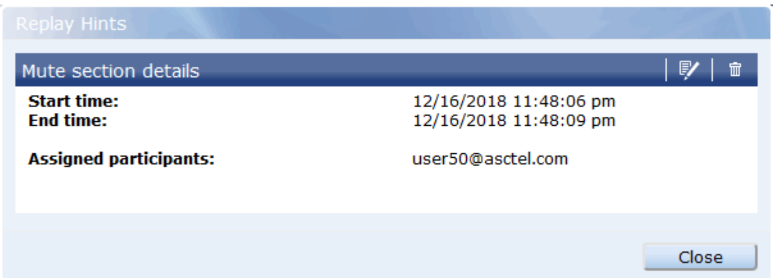


Fig. 104: Mute Section Details (example)

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

6.2.5 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 AB *(Loop)*.

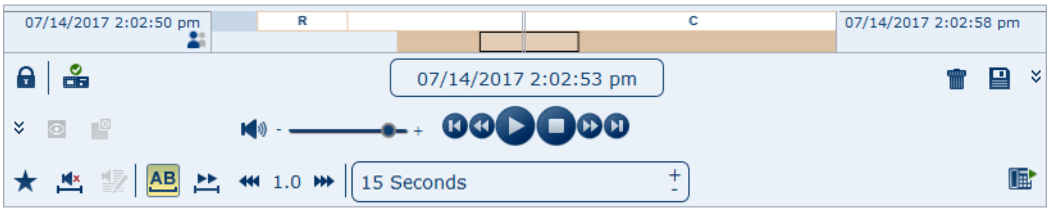


Fig. 105: Conversation with replay loop

6.3 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.

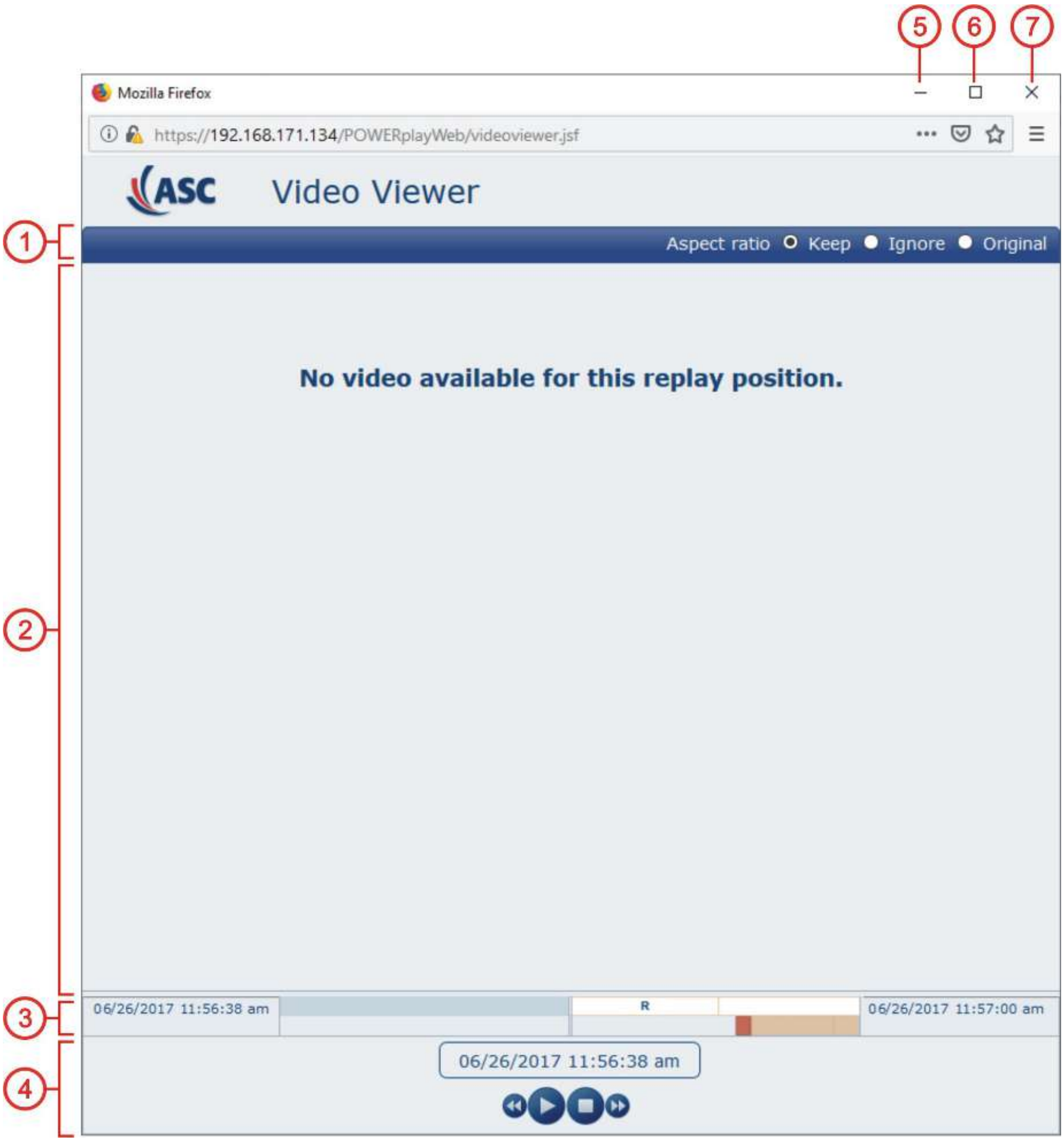


Fig. 106: Video Viewer (example)

1	Option bar	Contains settings for displaying video recordings, see chapter "Option bar", p. 82.
2	Main view	Shows the Video recording.
3	Replay bar	Shows the loaded video recordings, see chapter "Replay bar", p. 82.
4	Functionality bar	Contains functionalities for the loaded conversations in the replay bar, see chapter "Icons", p. 72. 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.

6.3.1 Option bar

The option bar contains settings for displaying video recordings.

Fig. 107: Option bar

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

Aspect ratio	This option is only active if *Adjust to Window* has been activated upon setting the video size. When setting the video size to *Original* and *User-Defined*, the setting *Aspect ratio* is deactivated. • *Keep* The original aspect ratio of the video recording remains unchanged in the window of the main view of the Video Viewer. • *Ignore* 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. • *Original* The video recording is displayed in its original size in the main view of the Video Viewer.

6.3.2 Replay bar

The replay bar shows the loaded video recordings.

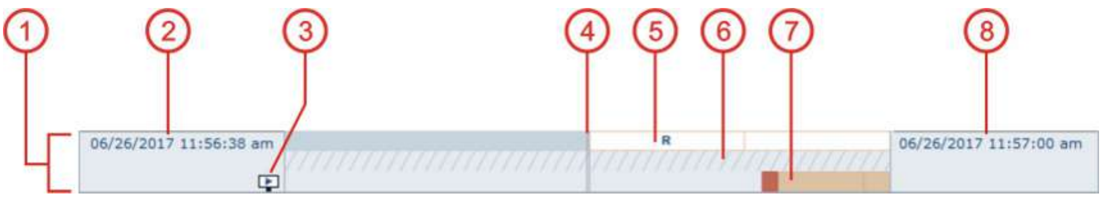


Fig. 108: Replay bar

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: 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: • 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. 70.
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.

6.4 Message Viewer

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

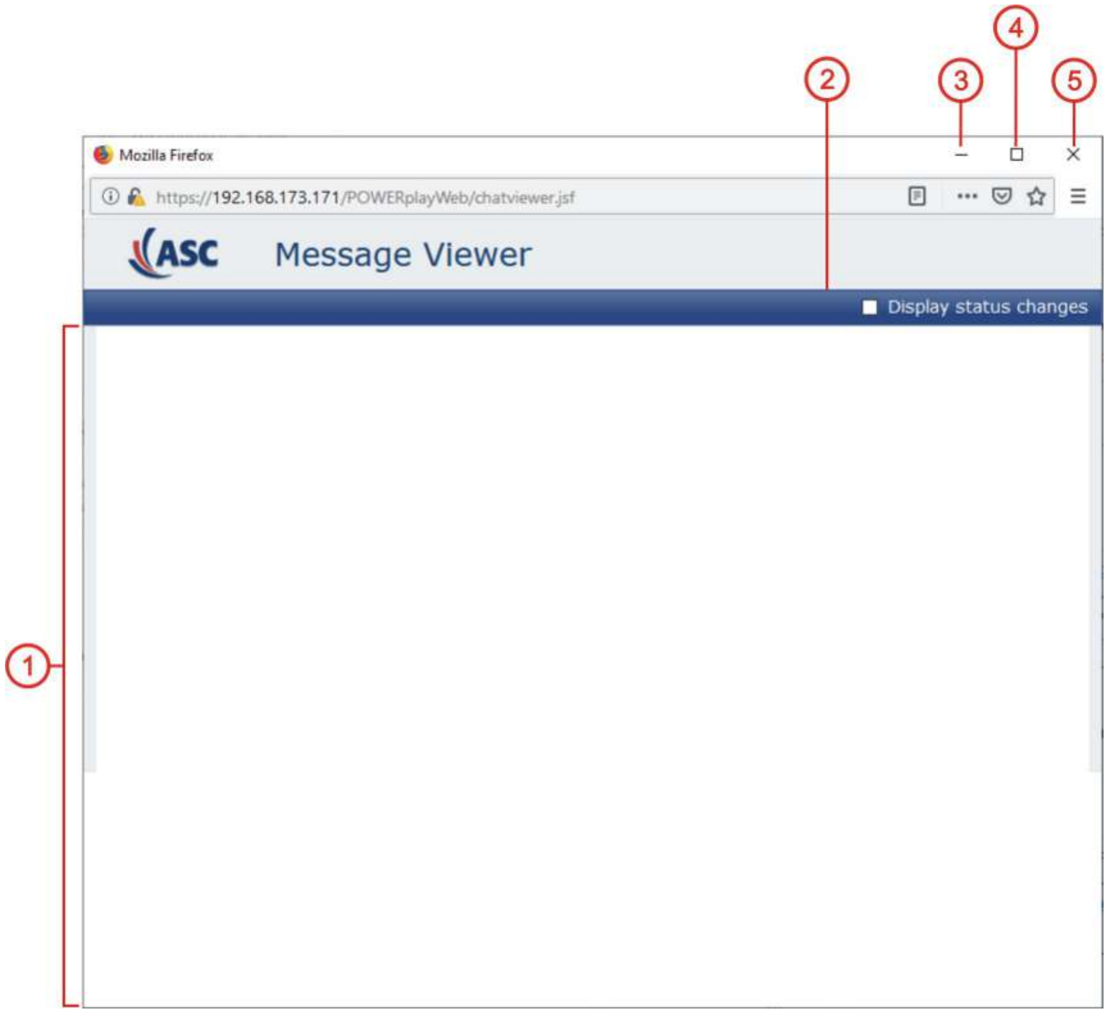


Fig. 109: Message Viewer

1	Main view	Displayed chat texts or text messages. See chapter "Main view", p. 84.
2	*Display status changes*	☑ = Displays the status changes. ☐ = 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.

6.4.1 Main view

The main view displays chat texts or text messages.

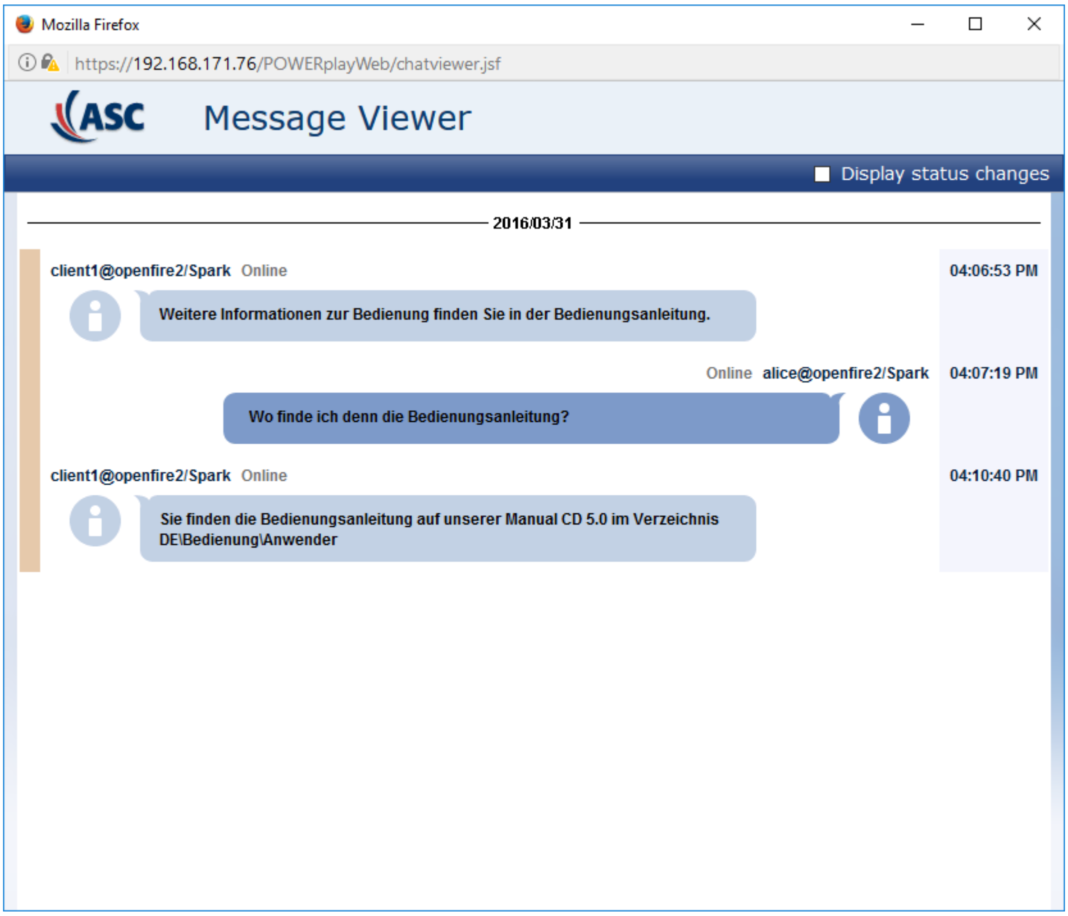


Fig. 110: Message Viewer without the display of the status changes (example)

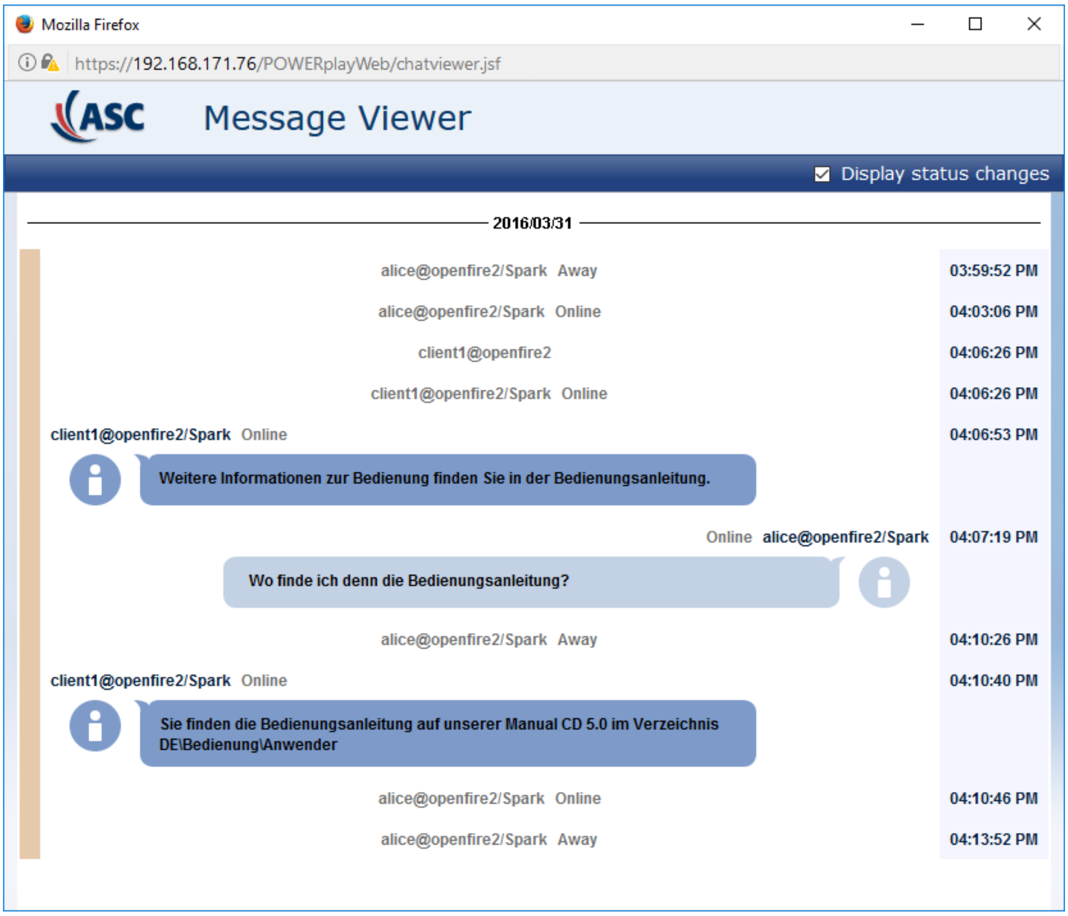


Fig. 111: Message Viewer with the display of the status changes (example)

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.

List of figures

List of tables

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.