

INSPIRATION^{neo}

E-Learning module



User manual

3/17/2020

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	5
2	Introduction	6
3	Training Packages module.....	7
3.1	General	7
3.2	Main view	7
3.2.1	Toolbar	8
3.2.1.1	Search.....	9
3.3	Detail view	10
3.3.1	Tab Details	11
3.3.2	Tab E-Learning Categories	11
3.3.2.1	Assign category.....	12
3.3.3	Tab Agent Feedback.....	12
3.4	Assign Training Package	13
3.4.1	Assign existing training package.....	13
3.4.1.1	Tab Details	13
3.4.1.2	Tab Agents.....	15
3.4.2	Create and assign training package.....	17
3.4.2.1	Tab Details	18
3.5	View training package	18
3.6	Accept training package.....	19
3.7	View evaluation	20
3.8	Load selected session.....	21
4	Quiz module.....	23
4.1	General	23
4.2	Main view	23
4.2.1	Toolbar	24
4.3	Detail view for assigned quizzes	25
4.3.1	Tab Details	26
4.3.2	Tab Properties.....	28
4.3.3	Tab Categories.....	28
4.4	Assign quiz	29
4.4.1	Tab Details	30
4.4.1.1	Add quiz template	30
4.4.2	Tab Agents.....	31
4.4.3	Tab Dependencies to Training Packages	32
4.4.3.1	Add training package template.....	32
4.4.4	Tab Categories.....	33
4.5	View quiz.....	33
4.6	Start quiz	34

5	Coaching Advisor module.....	36
5.1	General	36
5.2	Main view	36
5.2.1	Toolbar	37
5.3	Detail view.....	38
5.3.1	Tab Details	39
5.3.2	Tab Categories.....	39
5.3.3	Tab Assigned Agents	40
5.4	Load session	40
5.5	Release session.....	41
5.6	Lock session	42
6	Replay module.....	43
6.1	Replay bar.....	43
6.1.1	Full view	44
6.1.2	Compressed view.....	44
6.1.3	Display of the loading states	45
6.1.4	Display of detected emotions	46
6.2	Functionality bar.....	46
6.2.1	Icons.....	47
6.2.2	Export all loaded elements.....	49
6.2.3	Create new bookmark	51
6.2.3.1	Create bookmarks with replay comment.....	51
6.2.3.2	Edit bookmarks with replay comment	52
6.2.3.3	Delete bookmarks with replay comment	53
6.2.4	Create new mute notification.....	53
6.2.4.1	Mute conversation section	53
6.2.4.2	Edit muted conversation section	54
6.2.4.3	Delete muted conversation section	55
6.2.5	Mark replay loop.....	55
6.3	Video Viewer	56
6.3.1	Option bar	57
6.3.2	Replay bar.....	57
6.4	Message Viewer.....	58
6.4.1	Main view	59
	List of figures	62
	List of tables	65
	Glossary.....	66

1 General information

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2 Introduction

2 Introduction

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. 7](#)

- Quiz module
See [chapter "Quiz module", p. 23](#).

- Coaching Advisor module
(This module is only available for users who have the right *Coaching Advisor*.)
See [chapter "Coaching Advisor module", p. 36](#).

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



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

3 Training Packages module

3.1 General

The Training Packages module allows users to create and assign new training packages. In addition, the main view contains an overview of the already assigned training packages for which the user can display their respective status as well as other details such as the deadline until which the training package has to be completed.

In the Training Packages module, supervisors can assign training packages. Agents who have been assigned a training package can accept and work on the training packages assigned to them in the Training Packages module. If no suitable training has been created in the Templates module yet, training packages can be created spontaneously and assigned to agents. Once agents have been assigned a training package, they are notified about the package and its deadline in the Training Packages module. Supervisors for their part are informed when an agent has started working on the training, has interrupted or finished it as well as when a deadline has passed.

In the training packages, you can include different learning material and assign it individually to single agents or agent groups for training purposes. A training package consists of graphic and written learning contents which allow employees to improve their skills.



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

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

3.2 Main view

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

+ × Training Packages General				
Training Package Name ↕	Agent ↕	Deadline ↕	Assignment Date ↕	Acceptance Date ↕
Training package 12/18	Agent, 4.	12/13/2018	12/11/2018 11:01:01 PM	12/11/2018 11:01:34 PM
Testpaket	Agent, 80.	12/29/2018	12/10/2018 2:39:42 AM	12/10/2018 2:39:59 AM
Vorlage 1	Agent, 80.	12/29/2018	12/09/2018 10:05:35 PM	
Trainingspaket	Agent, 80.	12/28/2018	12/09/2018 9:46:33 PM	
Testpaket	Agent, 1.	11/30/2018	11/23/2018 1:13:02 AM	11/23/2018 1:14:01 AM
Test	Agent, 80.	11/13/2024	11/21/2018 2:06:51 AM	

Rows per page 50 1 - 6 of 6 < >

Fig. 1: 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

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

3.2.1

Toolbar

The toolbar offers the following functions.

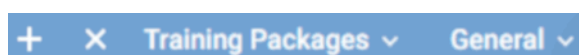




Fig. 2: Training Packages module - toolbar of the main view

	<i>Create/Assign</i>	Creates a new training package (see chapter "Assign Training Package", p. 13).
	<i>Delete training package</i>	Deletes the selected training package.
<i>Training Packages</i>	<i>View Training Package</i>	Opens the training package (see chapter "View training package", p. 18).
	<i>Accept Training Package</i>	The assigned agent can accept and open the training package with this button (see chapter "Accept training package", p. 19). This option is only available for the person who has been assigned the package.
	<i>Finalize Training Package</i>	The assigned agent can finalize the training package with this button. This option is only available for the person who has been assigned the package.
	<i>View Evaluation</i>	Opens the evaluation in which the training package has been created (see chapter "View evaluation", p. 20). This option is only available if the training package has been created in the Evaluations module.
	<i>Load</i>	Loads the session that the training package has been created for into the Replay module for replay (see chapter "Load selected session", p. 21). For information about the functions of the Replay module see chapter "Replay module", p. 43 . This option is only active if the training package has been created in the Sessions module.
	<i>Print training package</i>	Prints the selected training package.
<i>General</i>	<i>Print</i>	Prints the table of the main view.
	<i>Adjust Table</i>	Opens a window in which you can adjust the following settings for the main view:

	<ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page
<i>Search</i>	<p>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. 9).</p> <p>When opening the module, a search filter is set automatically so that only data sets of the current day are displayed.</p>
<i>Reset Search</i>	Resets all manually entered search criteria. The search is started without manual filter settings.
<i>General Help</i>	Via the menu item <i>General Help</i> , a description of the application you are currently viewing is opened.
<i>Module Help</i>	Via the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened.



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

3.2.1.1 Search

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

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

⇒ The window *Search Criteria* appears.

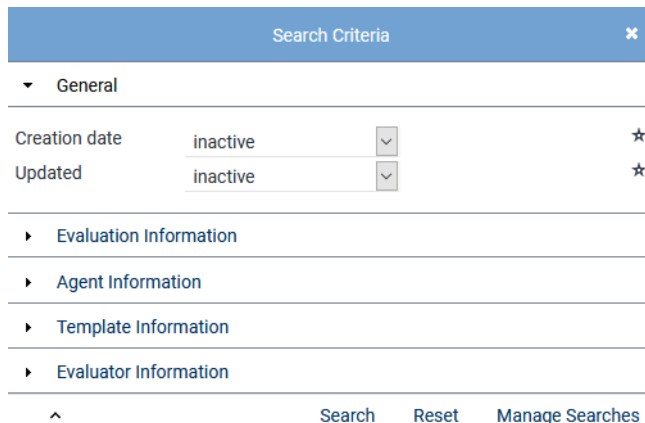


Fig. 3: Window Search Criteria (example)

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

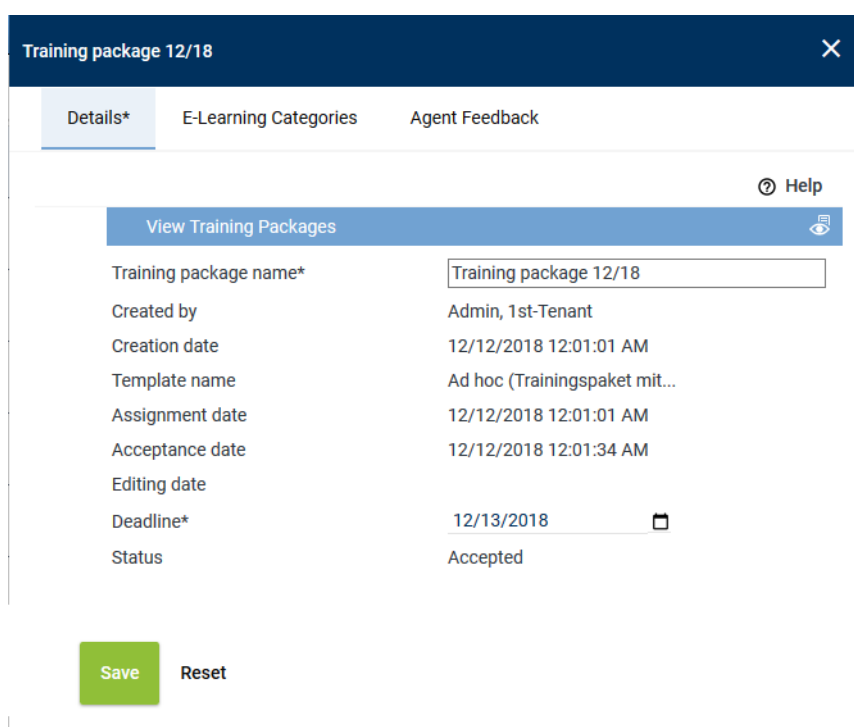
You cannot delete these user-specific filter settings or search settings: however, you can add new ones and thus additionally filter the displayed entries in the main view.




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

3.3 Detail view

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



The screenshot shows the 'Training package 12/18' detail view. It has three tabs: 'Details*' (selected), 'E-Learning Categories', and 'Agent Feedback'. The 'Details*' tab contains a 'View Training Packages' header with a help icon. Below this is a table of details:

Training package name*	Training package 12/18
Created by	Admin, 1st-Tenant
Creation date	12/12/2018 12:01:01 AM
Template name	Ad hoc (Trainingspaket mit...
Assignment date	12/12/2018 12:01:01 AM
Acceptance date	12/12/2018 12:01:34 AM
Editing date	
Deadline*	12/13/2018 
Status	Accepted

At the bottom, there are two buttons: 'Save' (green) and 'Reset'.

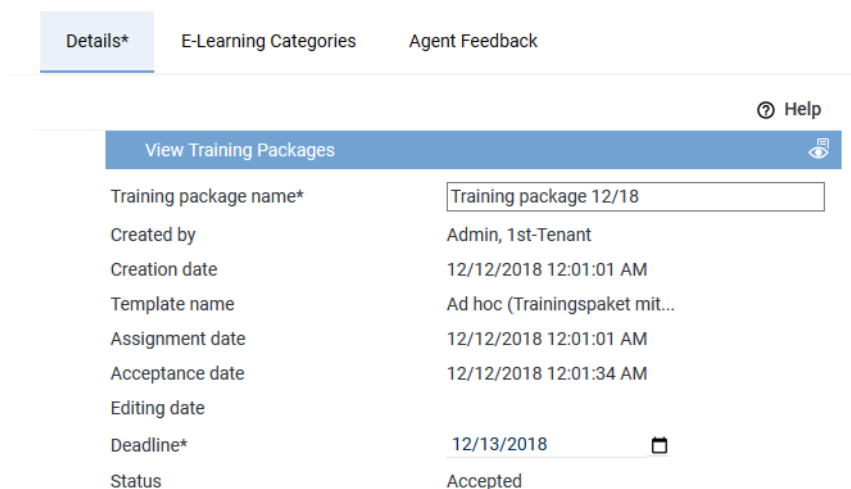
Fig. 4: Training packages - detail view

The detail view consists of the following tabs:

- **Details**
Here, you can display and edit detailed information about the selected training package. See [chapter "Tab Details", p. 11](#).
- **E-Learning Categories**
Here, you can add or remove e-learning categories. See [chapter "Tab E-Learning Categories", p. 11](#).
- **Agent Feedback**
Here, you can enter a feedback about the training package. See [chapter "Tab Agent Feedback", p. 12](#).

3.3.1 Tab Details

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



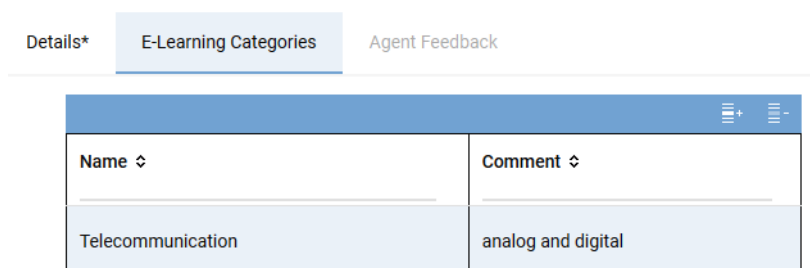
View Training Packages	
Training package name*	Training package 12/18
Created by	Admin, 1st-Tenant
Creation date	12/12/2018 12:01:01 AM
Template name	Ad hoc (Trainingspaket mit...
Assignment date	12/12/2018 12:01:01 AM
Acceptance date	12/12/2018 12:01:34 AM
Editing date	
Deadline*	12/13/2018
Status	Accepted

Fig. 5: Tab Details

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



3.3.2 Tab E-Learning Categories

Here, you can add or remove e-learning categories for the training package.



Name	Comment
Telecommunication	analog and digital


Fig. 6: Tab E-Learning Categories (example)

	Add	Opens a window in which you can add new e-learning categories (see chapter "Assign category", p. 12).
	Remove	Removes the selected e-learning category from the list.



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

3.3.2.1 Assign category

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



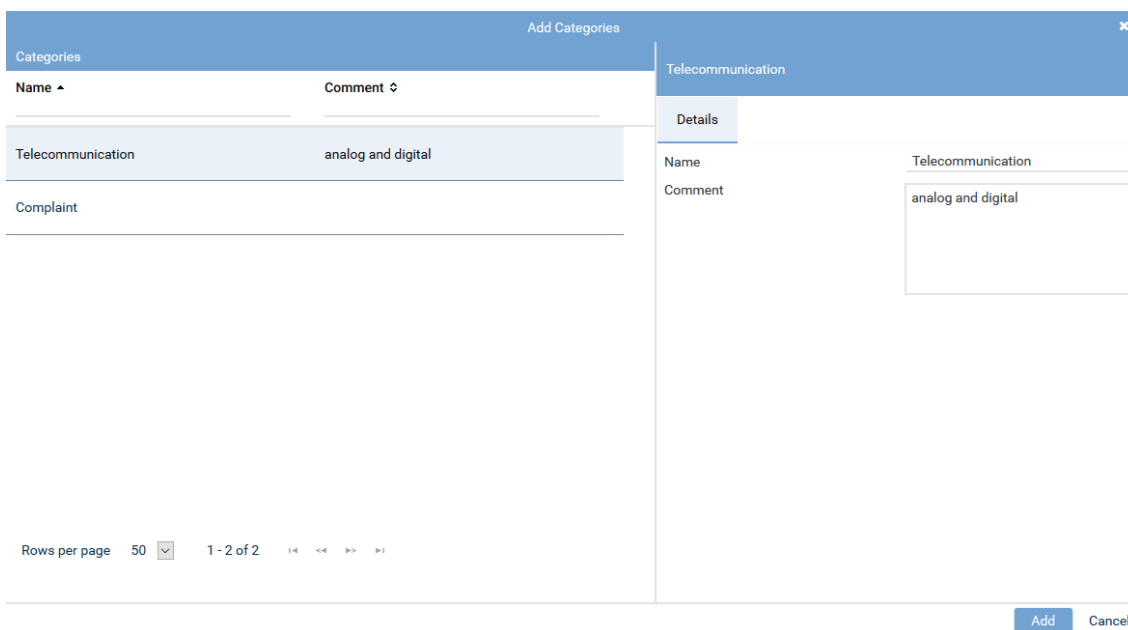
 	
Name ↕	Comment ↕
Telecommunication	analog and digital

Fig. 7: 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.



Add Categories [X]

Categories	
Name	Comment
Telecommunication	analog and digital
Complaint	

Rows per page: 50 | 1 - 2 of 2 | < >

Details

Name	Telecommunication
Comment	analog and digital

Add **Cancel**

Fig. 8: 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**.

3.3.3 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.

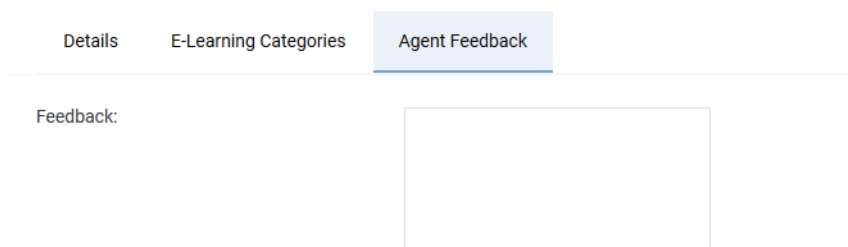


Fig. 9: Enter agent feedback


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

3.4 Assign Training Package

There are the following possibilities to create and assign a training package:

- A training package is created on basis of an existing template and assigned to the agents. See [chapter "Assign existing training package", p. 13](#)
- A new specific training package is created without a template and assigned to the agents. This specific training package cannot be used as training package template for other training packages. See [chapter "Create and assign training package", p. 17](#)

3.4.1 Assign existing training package

1. Click on the icon  (*Create/Assign*) in the main view.
2. Select the option *Assign*.
⇒ The following window appears:

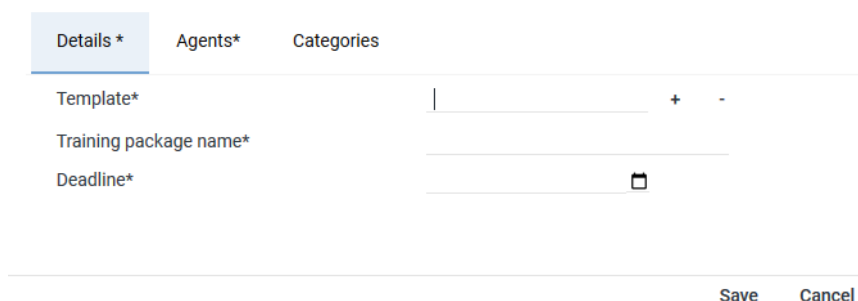


Fig. 10: Assign Training Package

3. Adjust all necessary settings within the displayed tabs.
You can change tabs without buffering without risking the loss of your settings.
 - Tab *Details*, see [chapter "Tab Details", p. 13](#).
 - Tab *Agents*, see [chapter "Tab Agents", p. 15](#).
 - Tab *Categories*, see [chapter "Tab E-Learning Categories", p. 11](#).
4. To assign the training package once you have finished adjusting the entries in the tabs, click on the button *Save*.
To discard the entries and close the window, click on the button *Cancel*.

3.4.1.1 Tab Details

Here, you can enter details of the training package.

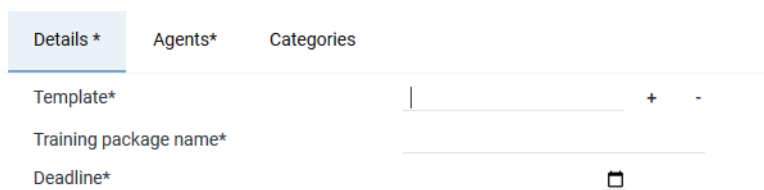



Fig. 11: Tab Details

Complete the 3 mandatory fields:

Template	To add a training package template to the training package, click on the button + , see chapter "Add training package template", p. 14 . The button - allows deleting a template from the training package.
Training package name	Enter a name for the training package.
Deadline	To add a deadline for working on a training package, enter the date directly via the keyboard or via the icon  .

3.4.1.1.1 Add training package template

1. Click on the button **+** on the right of the field *Template*.

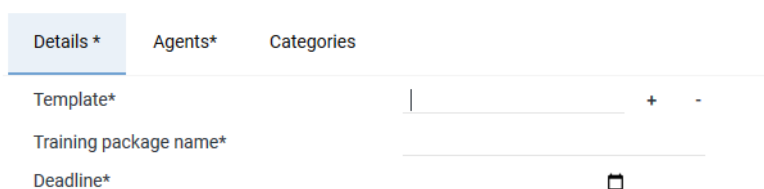


Fig. 12: Tab Details

2. Select a template from the list.

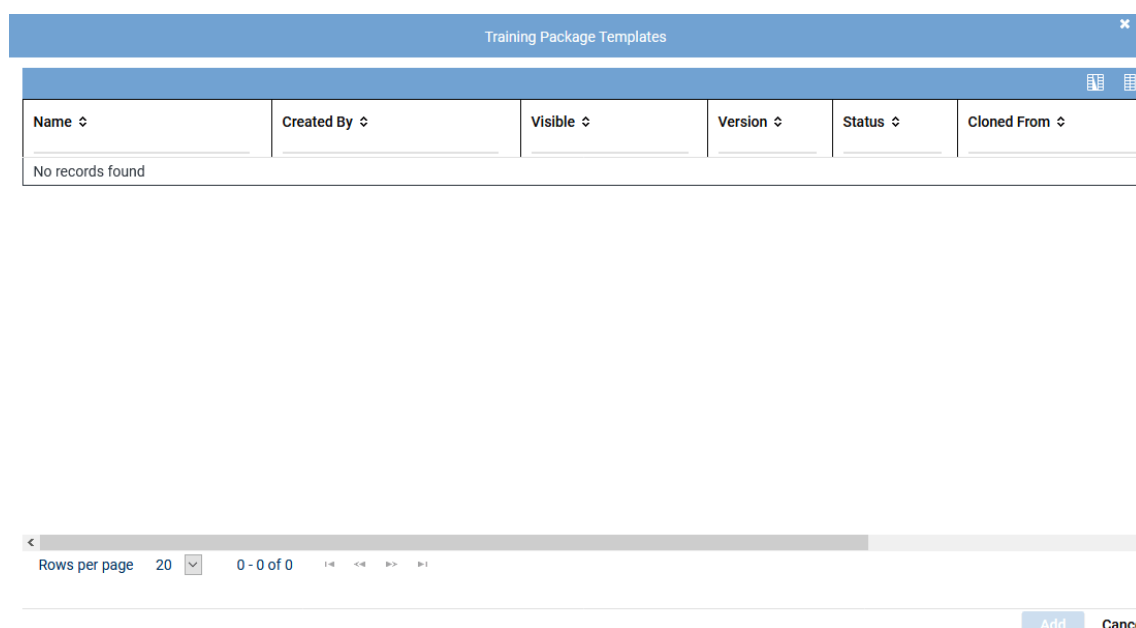


Fig. 13: Add training package template



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

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

3.4.1.2 Tab Agents

Here, you can compile a list of agents who will be assigned the training package.



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

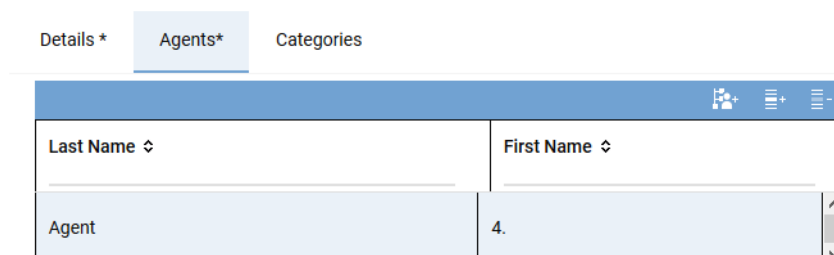





Fig. 14: Tab Agents

	Add from organization structure	Opens a window in which you can select agents from the organization structure (see chapter "Add agents from organization structure", p. 15).
	Add	Opens a window in which you can select agents who are not necessarily contained in an organization structure (see chapter "Add agents", p. 16).
	Remove	Removes the selected agent from the list.

3.4.1.2.1 Add agents from organization structure


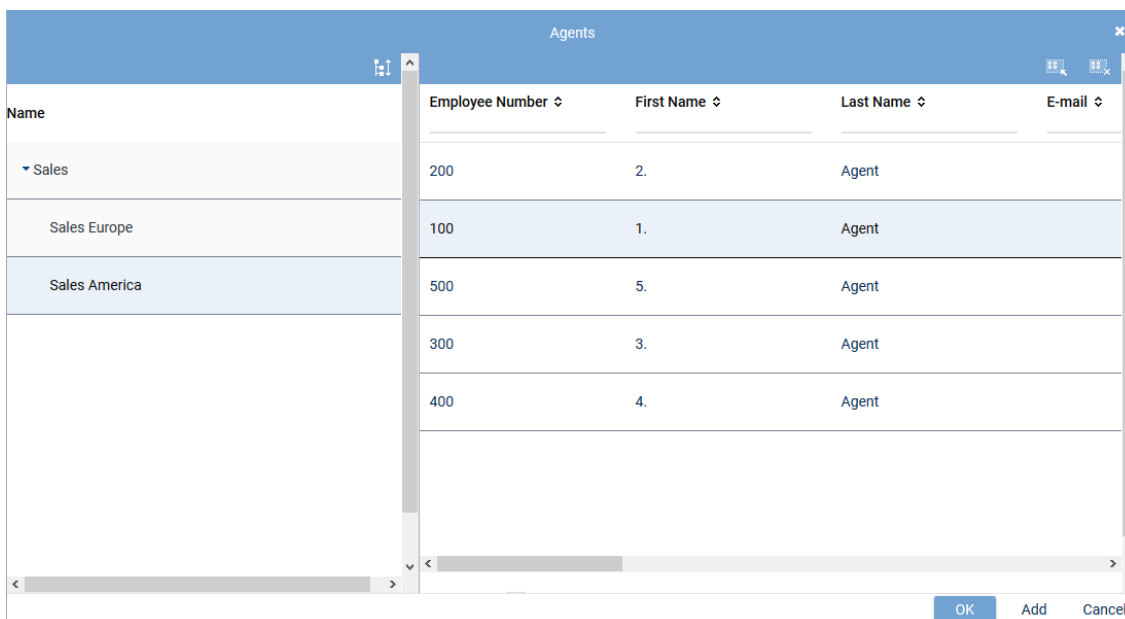
- To assign agents from the organization structure, click on the icon  (*Add from organization structure*).





Fig. 15: Agents

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



Name	Employee Number	First Name	Last Name	E-mail
▼ Sales	200	2.	Agent	
Sales Europe	100	1.	Agent	
Sales America	500	5.	Agent	
	300	3.	Agent	
	400	4.	Agent	


Fig. 16: Add agents from organization structure

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

3.4.1.2.2 Add agents



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

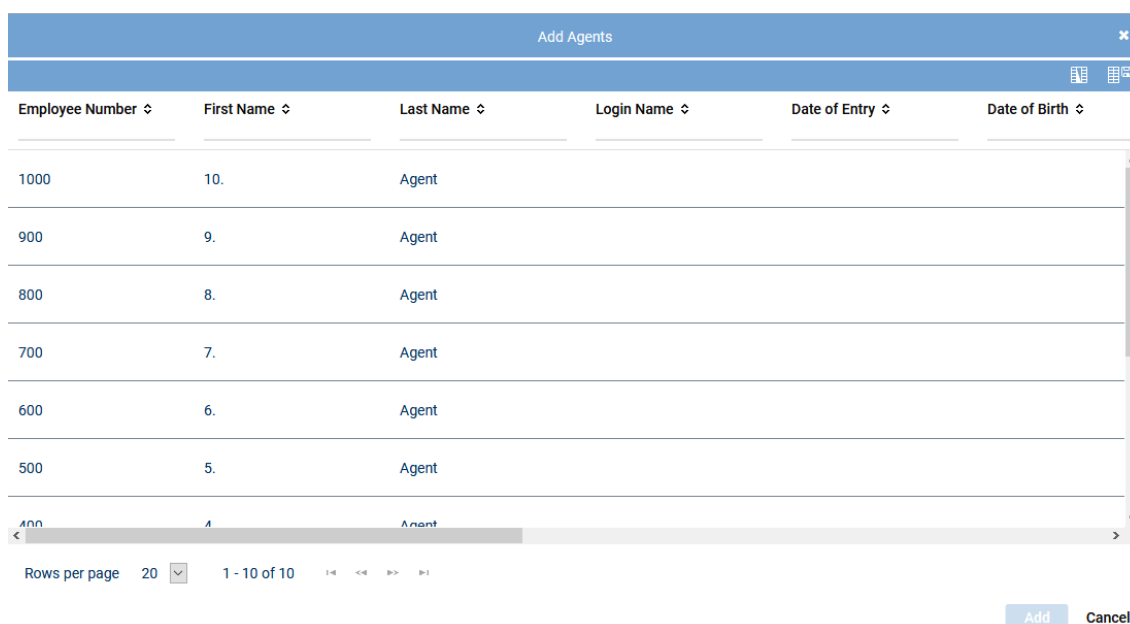
1. To assign an agent, click on the icon  (*Add*).



Last Name	First Name
No records found	

Fig. 17: Agents (example)

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




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

Fig. 18: Add own agents

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

3.4.2 Create and assign training package

- Click on the icon  (*Create/Assign*) in the main view.
- Select the option *Create/Assign*.
⇒ The template generator opens.
- Set up the template according to your requirements.



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

- To save all changes in the cache and close the template generator, click on the button *Next*.
To discard all changes and close the template generator, click on the button *Cancel*.
- The following window appears:

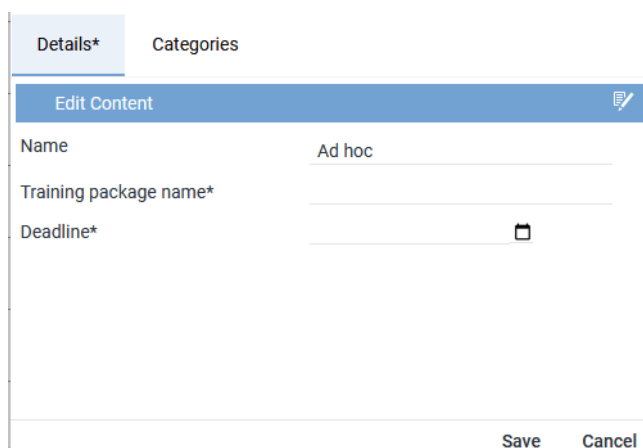


Fig. 19: Assign training package (example)

- Adjust all necessary settings within the displayed tabs.
You can change tabs without buffering without risking the loss of your settings.

- Tab *Details*, see [chapter "Tab Details"](#), p. 18.
 - Tab *Agents* (only in the Training Packages module), see [chapter "Tab Agents"](#), p. 15.
 - Tab *Categories*, see [chapter "Tab E-Learning Categories"](#), p. 11.
7. To assign the training package once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

3.4.2.1 Tab Details

Here, you can enter details of the training package.

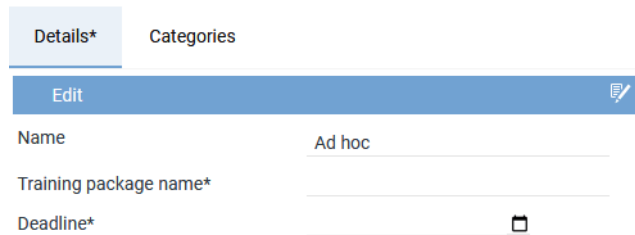



Fig. 20: Tab Details (example)

Complete the 3 mandatory fields:

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

3.5 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.

+ × Training Packages ▾ General ▾				
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. 21: Select training package (example)

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

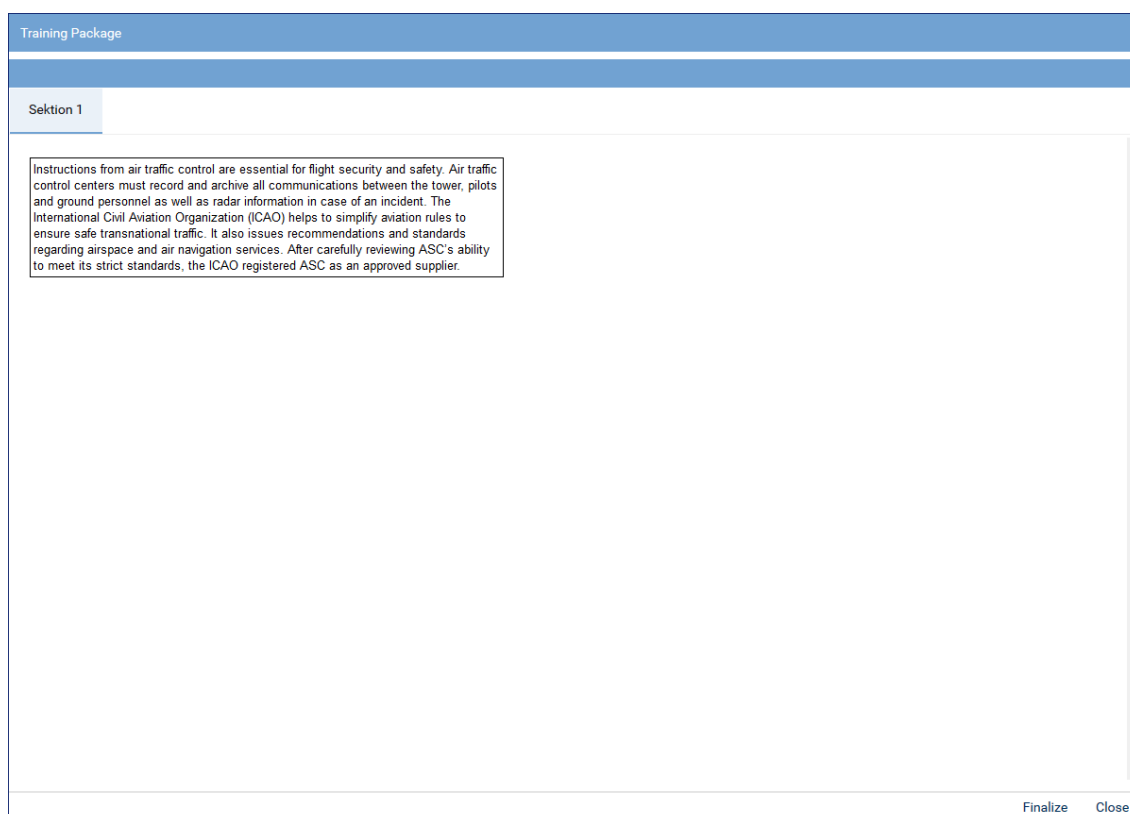


Fig. 22: View training package (example: accepted training package)

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	<p>The training package is finalized.</p> <p>The button <i>Finalize</i> 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.</p>
Close	<p>The window <i>Training Package</i> is closed.</p> <p>If the training package has been accepted but not finalized yet, it can be viewed again later and finalized then.</p>

3.6

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 Packages ▾ General ▾				
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. 23: Select training package (example)

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

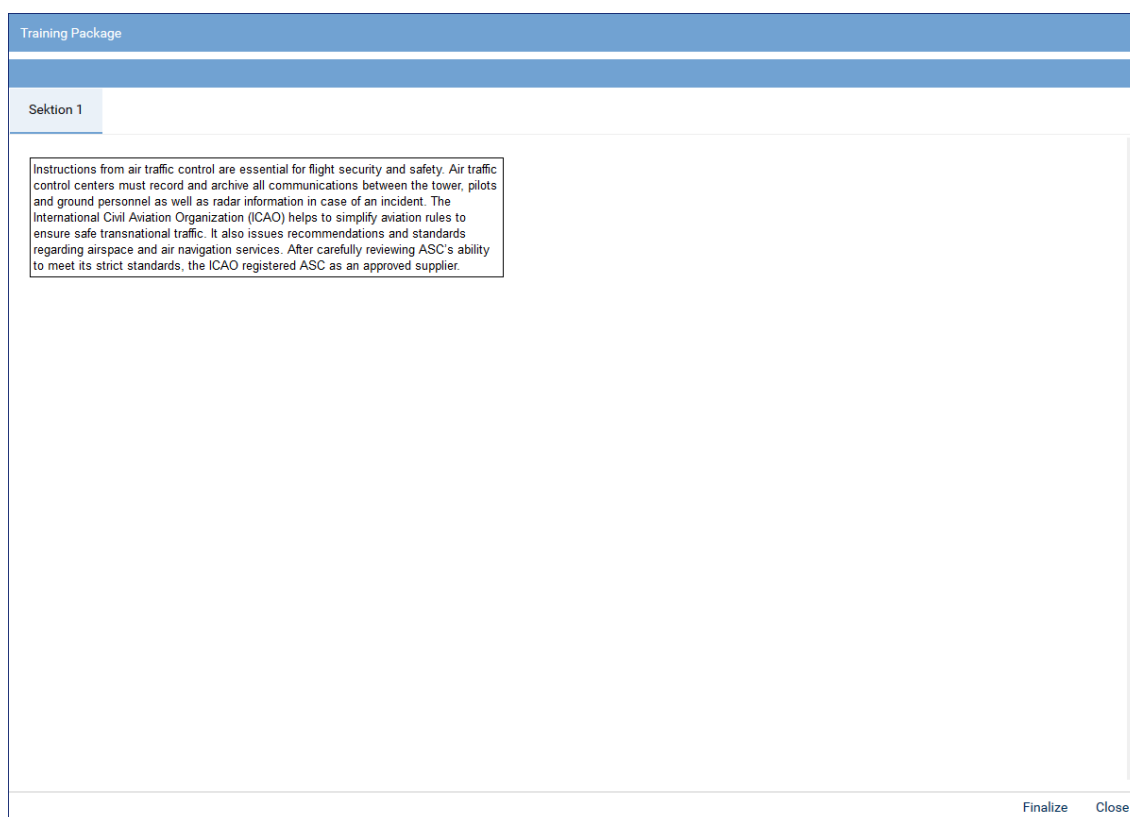


Fig. 24: View training package (example: accepted training package)

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:

<i>Terminate</i>	<p>The training package is finalized.</p> <p>The button <i>Finalize</i> 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.</p>
<i>Close</i>	<p>The window <i>Training Package</i> is closed.</p> <p>If the training package has been accepted but not finalized yet, it can be viewed again later and finalized then.</p>

3.7

View evaluation



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

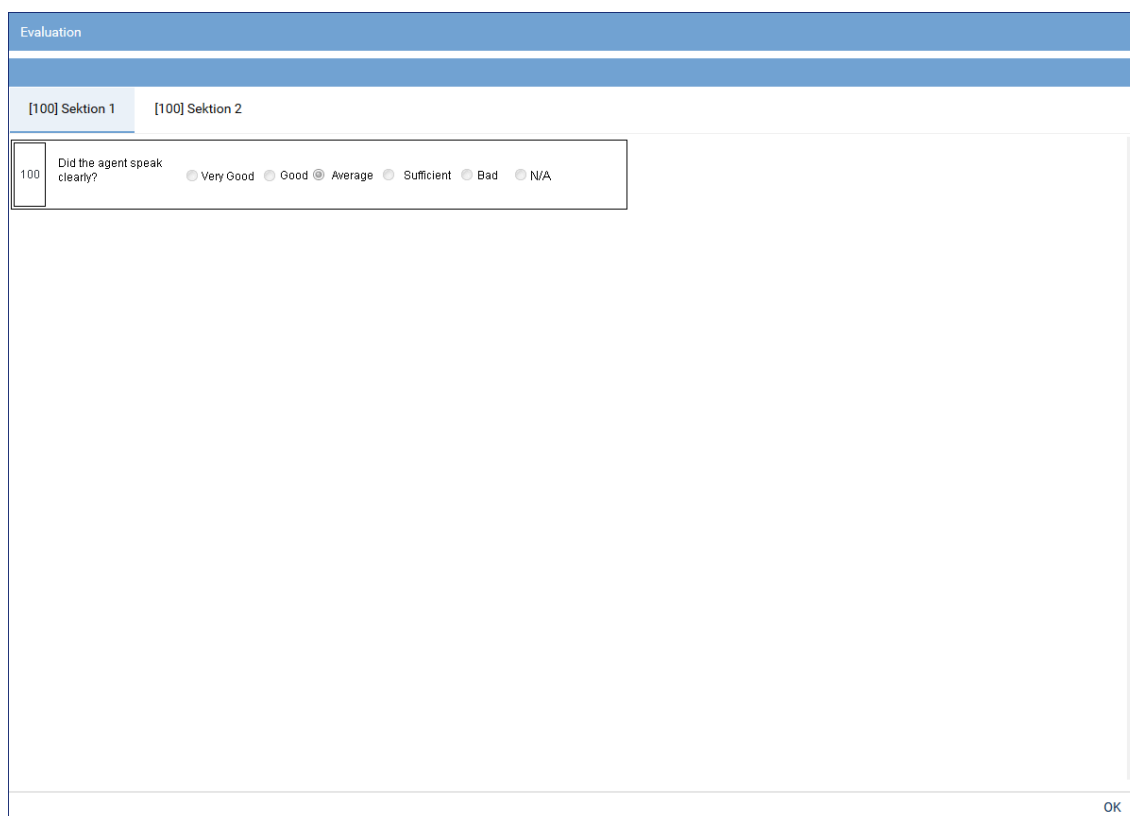
This function allows viewing the evaluation of a training package created in the Evaluations module.

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. 25: Select training package (example)

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



The screenshot shows the 'Evaluation' window. At the top, there are tabs for '[100] Sektion 1' and '[100] Sektion 2'. Below the tabs, there is a question: 'Did the agent speak clearly?'. To the right of the question are six radio button options: 'Very Good', 'Good', 'Average' (which is selected), 'Sufficient', 'Bad', and 'N/A'. At the bottom right of the window is an 'OK' button.

Fig. 26: Evaluations

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

3.8 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.

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

Load All	The entire recorded session is loaded into the Replay module.
-----------------	---

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

- The session is loaded into the Replay module and can be replayed there.
For information about the functions of the Replay module see [chapter "Replay module"](#), p. 43.

4 Quiz module

4.1 General

The Quiz module allows verifying the knowledge of an agent and broadens the reach of the Training Packages module since recently acquired knowledge can be tested by means of quizzes. However, quizzes can be seen as a way of training, too, where agents become acquainted with content in a playful manner. The Quiz module offers an overview of all already assigned quizzes with the corresponding current status.

In the Quiz module, all quiz templates are available which have been created and released in the Quiz Templates module. These quiz templates can be assigned to individual agents or agent groups as a quiz. This allows agents to verify their knowledge and supervisors to check whether an assigned training had the desired effect. The cycle of identifying deficits, assigning target-oriented training and assessing the success of such a training is thus completed.

You can use different options to set up a quiz:

- No limitations

Agents can solve the quizzes in their idle time without specified deadlines and repeat them as often as desired while their supervisors are not informed about the results of the quizzes. That way, agents can verify, extend, and consolidate their knowledge in an informal training.

- Deadlines

Quizzes can be assigned with a deadline until which they have to be completed, too. Once agents start the quiz, they have to finish it within the given time. A quiz with a time limit cannot be repeated. This allows creating an exam situation, e. g. to verify the success of a training.

- Repeatability

You can select whether a quiz is repeatable. For a quiz which may be repeated you cannot set a time limit.

- Assigning training packages automatically

You can define a training package which will automatically be assigned to agents who have not received a certain minimum score in a quiz. Thus, the process of revealing a deficit and assigning a training to remove it is automated.

The Quiz module contains a fully developed notification system: Agents are notified as soon as they have been assigned a quiz or when a deadline approaches. Supervisors are informed when an agent has started working on the quiz, has interrupted or finished it as well as when a deadline has passed.



Information about the topic of quiz templates can be found in the user manual *INSPIRATIONneo - Templates module*.

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

4.2 Main view

In the main view, all assigned quizzes are displayed.

Quiz Name ↕	Agent ↕	Deadline ↕	Created By ↕	Status ↕	Completion Date
Produktportfolio	Agent, 4.	12/28/2018	Admin, 1st-Tenant	👉	
Gesprächsaufzeichnung	Agent, 4.	12/14/2018	Admin, 1st-Tenant	🏠	12/12/2018
WFO Knowledge	Agent, 4.	01/17/2019	Admin, 1st-Tenant	👉	
Cross- und Up-Selling	Agent, 4.	12/31/2018	Admin, 1st-Tenant	👉	

Rows per page 50 1 - 4 of 4

Fig. 27: 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.

4.2.1 Toolbar

The toolbar offers the following functions.

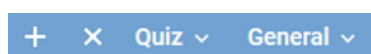


Fig. 28: Quiz module - toolbar

+	Assign	Opens a window in the detail view in which you can create a new quiz and assign this quiz to one or to several agents (see chapter "Assign quiz", p. 29).
x	Delete	Deletes the selected quiz.
Quiz	View	Opens a window in which you can see the result of the selected quiz (see chapter "View quiz", p. 33). 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 <i>Show results to superior</i> and <i>Show results to agent</i> are configured during the assignment of a quiz (see chapter "Tab Details", p. 30).

	<i>Start</i>	Starts the selected quiz (see chapter "Start quiz", p. 34).
	<i>Print Quiz</i>	Prints the selected quiz.
<i>General</i>	<i>Print</i>	Prints the table of the main view.
	<i>Adjust Table</i>	Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page.
	<i>Search</i>	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria (see chapter "Search", p. 9). When opening the module, a search filter is set automatically so that only data sets of the current day are displayed.
	<i>Reset Search</i>	Resets all manually entered search criteria. The search is started without manual filter settings.
	<i>General Help</i>	Via the menu item <i>General Help</i> , a description of the application you are currently viewing is opened.
	<i>Module Help</i>	Via the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened.



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

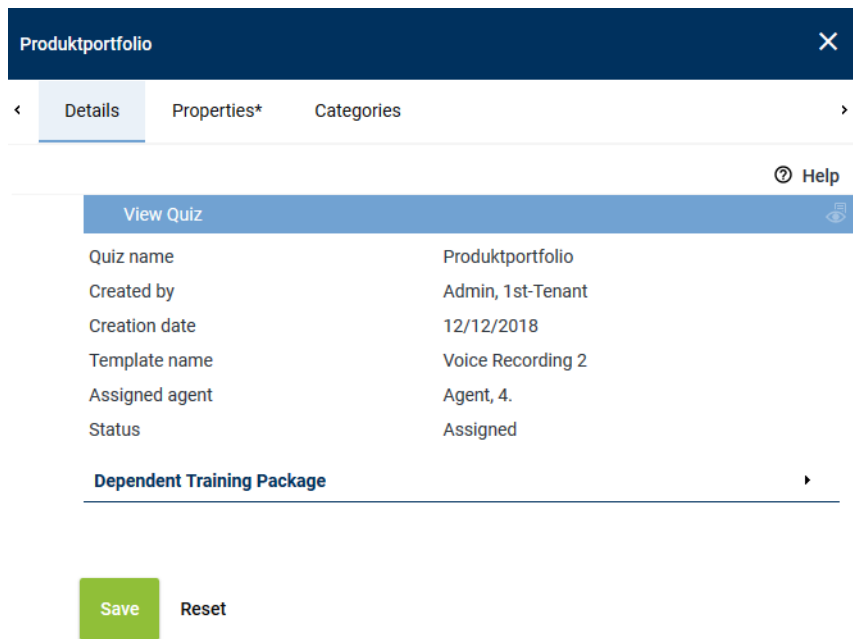
4.3

Detail view for assigned quizzes

When selecting a quiz in the main view, additional information about the selected quiz is displayed in the detail view.



If you create and assign a new quiz, another window opens in the area of the detail view. See [chapter "Assign quiz", p. 29](#).



Produktportfolio	
Quiz name	Produktportfolio
Created by	Admin, 1st-Tenant
Creation date	12/12/2018
Template name	Voice Recording 2
Assigned agent	Agent, 4.
Status	Assigned

Dependent Training Package

Save **Reset**

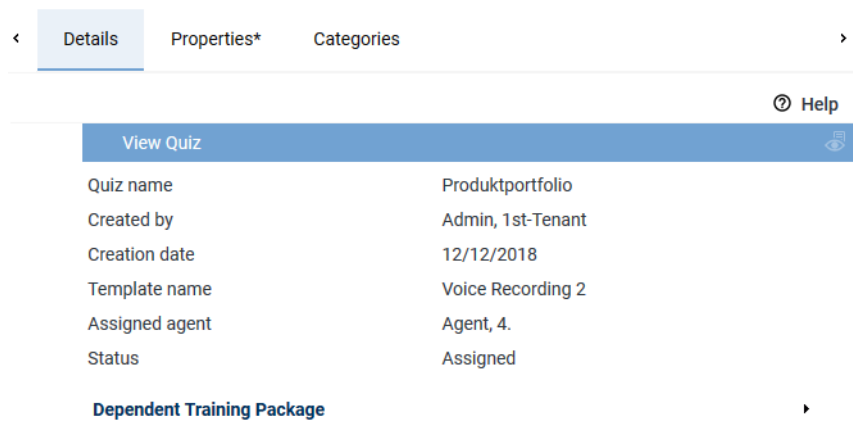
Fig. 29: Quiz - detail view

In case of assigned quizzes, the detail view consists of the following tabs:

- **Details**
Here, you can view detailed information about the selected quiz.
See [chapter "Tab Details", p. 26](#).
- **Properties**
Here, you can display and edit the properties of the selected quiz.
See [chapter "Tab Properties", p. 28](#).
- **Categories**
Here, you can add or remove categories.
See [chapter "Tab Categories", p. 28](#)

4.3.1 Tab Details

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



Produktportfolio	
Quiz name	Produktportfolio
Created by	Admin, 1st-Tenant
Creation date	12/12/2018
Template name	Voice Recording 2
Assigned agent	Agent, 4.
Status	Assigned

Dependent Training Package

Fig. 30: Tab Details - assigned quiz

<i>Quiz name</i>	Name of the quiz
<i>Created by</i>	Name of the user who has created and assigned the quiz
<i>Creation date</i>	Date on which the quiz was saved
<i>Template name</i>	Name of the quiz template which is used for the quiz
<i>Assigned agent</i>	Name of the agent who has been assigned the quiz
<i>Status</i>	Shows the editing status of the quiz. <i>Assigned</i> = Quiz has been assigned. <i>Started</i> = Quiz has been started. <i>Finished</i> = Quiz has been finished. <i>Not finished</i> = Quiz has either not been started or not been finished until its deadline.
<i>Completion date</i>	Date on which the quiz was completed
<i>Duration</i>	Time needed for the working on the quiz This information is only displayed for quizzes which have already been started or finalized.
<i>Result</i>	Result of the quiz. This information is only available for finalized quizzes. To be able to see the quiz results, you additionally have to have the respective right. The rights <i>Show results to superior</i> and <i>Show results to agent</i> are configured during the assignment of a quiz (see chapter "Tab Details", p. 30). The rating scheme for the assessment of the quiz is selected during the creation of the quiz template. Information about the topic of quiz templates can be found in the user manual <i>INSPIRATIONneo - Templates module</i> .

Group field Dependent Training Package



The group field *Dependent Training Package* is only displayed if the quiz includes dependencies to a training package.

Dependent Training Package	
Training package name	Produktschulung
Training package template	Produktschulung
Deadline of the training package	12/30/2018
Total score	30

Fig. 31: Group field Dependent Training Package

<i>Training package name</i>	Name of training package
<i>Training package template</i>	Name of the training package template which is used for the training package.
<i>Deadline of the training package</i>	Date on which the training package has to be finalized.
<i>Total score</i>	Threshold value for the assignment of the training package. If this score is not reached as quiz result, then the training package is automatically assigned to the respective agent.

4.3.2 Tab Properties

Upon starting or finalizing a quiz, the values in the tab *Properties* are displayed for you information only.


As long as the quiz has not been started or finalized yet, you can change the deadline. Once a quiz has been finalized, the deadline is displayed only for your information, too.



If you select a quiz in the main view and change its deadline, then the changed deadline affects all agents who have been assigned this quiz and have not started or finalized the quiz yet. In other words, the new deadline applies to all quizzes with an identical name and creation date which have not been started or finalized yet.



Fig. 32: Tab Properties - assigned quiz

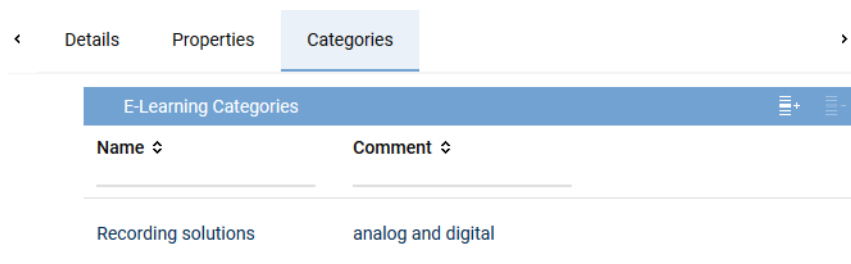
Deadline	Shows the date on which the quiz has to be finalized. You can enter the date directly in the entry field via the keyboard or via the icon  .
Show results to superior	Shows whether the results are visible for the superior. <input checked="" type="checkbox"/> = Results are visible for the superior. <input type="checkbox"/> = Results are not visible for the superior.
Show results to agent	Shows whether the results are visible for the agent. <ul style="list-style-type: none"> • <i>Never</i> = The results are not visible for the agent. • <i>Directly</i> = The results are visible for the agent in a pop-up window after completing the quiz. • <i>Deadline</i> = The results are visible for the agent after the entered deadline.
Repeatable/time limit	Shows whether the quiz is repeatable or whether there is a time limit for the completion of the quiz. <ul style="list-style-type: none"> • <i>Not repeatable</i> = The quiz is not repeatable. • <i>Repeatable</i> = The quiz can be repeated as often as necessary before the deadline. • <i>No time limit</i> = There is no time limit for the completion of the quiz. • <i>Time limit</i> = The quiz has to be completed within the displayed time limit.

4.3.3 Tab Categories

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





Agents can only see the corresponding categories but are not able to change them.



Name ↕	Comment ↕
Recording solutions	analog and digital

Fig. 33: Tab Categories - assigned quiz


	Add	Opens a window in which you can select and add categories, see chapter "Assign category", p. 12.
	Remove	Removes the selected category from the list.



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

4.4

Assign quiz

- Click on the button  (*Assign*).
⇒ The window *Assign Quiz* appears.

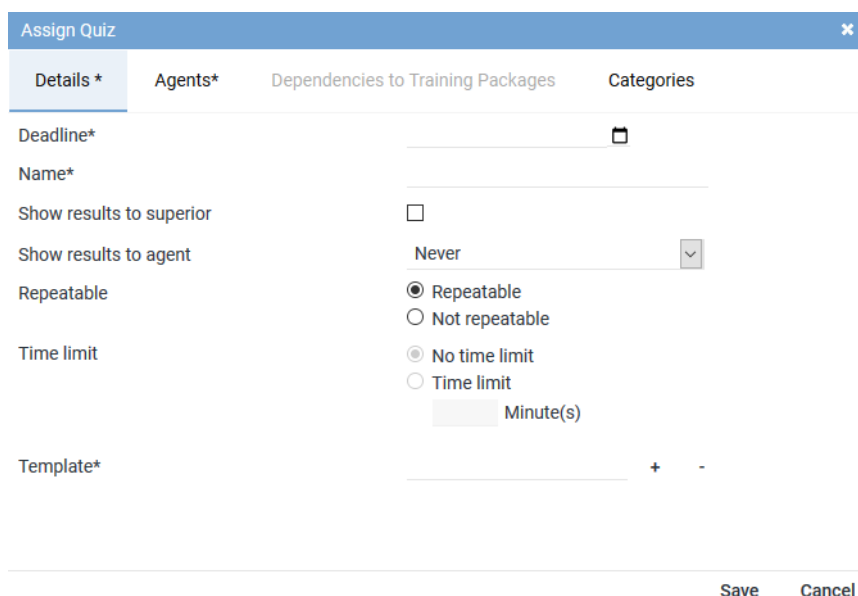


Fig. 34: Create and assign quiz

- Adjust all necessary settings within the displayed tabs.
You can change tabs without buffering without risking the loss of your settings.
 - Tab *Details*, see [chapter "Tab Details", p. 30](#)
 - Tab *Agents*, see [chapter "Tab Agents", p. 31](#)
 - Tab *Dependencies to Training Packages*, see [chapter "Tab Dependencies to Training Packages", p. 32](#)
 - Tab *Categories*, see [chapter "Tab Categories", p. 33](#)
- To assign the quiz once you have finished adjusting the entries in the tabs, click on the button *Save*.
To discard the entries and close the window, click on the button *Cancel*.

4.4.1 Tab Details

Here, you can adjust basic settings of the quiz.

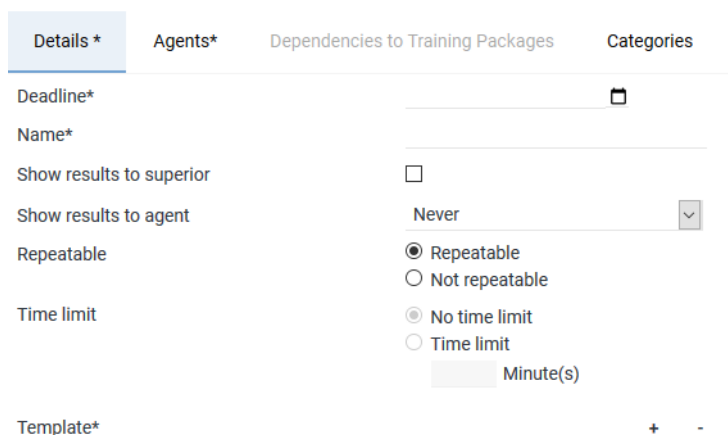




Fig. 35: Assign quiz - tab Details

Deadline	Date on which the quiz has to be finalized. You can enter the date directly in the entry field via the keyboard or via the icon  .
Name	Enter a name for the quiz.
Show results to superior	Select whether the results are visible for the superior. <input checked="" type="checkbox"/> = Results are visible for the superior. <input type="checkbox"/> = Results are not visible for the superior.
Show results to agent	Select whether the results are visible for the agent. The following possibilities are available: <ul style="list-style-type: none"> <i>Never</i> = The results are not visible for the agent. <i>Directly</i> = The results are visible for the agent in a pop-up window after completing the quiz. <i>Deadline</i> = The results are visible for the agent after the entered deadline.
Repeatable	Select whether the quiz is repeatable. The following possibilities are available: <ul style="list-style-type: none"> <i>Not repeatable</i> = The quiz is not repeatable. <i>Repeatable</i> = The quiz can be repeated as often as necessary before the deadline.
Time limit	Select whether there is a time limit for the completion of the quiz. The following possibilities are available: <ul style="list-style-type: none"> <i>No time limit</i> = There is no time limit for the completion of the quiz. <i>Time limit</i> = There is a time limit for the completion of the quiz. In the entry field <i>Minute(s)</i>, enter the time limit in minutes.
Template	Select which quiz template is used for the quiz (see chapter "Add quiz template", p. 30).

4.4.1.1 Add quiz template

1. Click on the button **+** on the right of the field *Template*.

2. Select a template from the list.

Add Quiz Template					
Name	Created By	Version	Visible	Cloned From	New V
Voice Recording 2	Admin, 1st-Tenant	1			

Rows per page 20 1 - 1 of 1

Add Cancel

Fig. 36: Add quiz template



Only released quiz templates can be assigned to the agents as a quiz.

3. To add a quiz template to the quiz, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

4.4.2

Tab Agents




Here, you can compile a list of agents who will be assigned the quiz.



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

Details *		Agents*	Dependencies to Training Packages	Categories
Last Name	First Name			
Agent	4.			
Agent	3.			

Fig. 37: Assign quiz - tab Agents

	<i>Add from organization structure</i>	Opens a window in which you can select agents from the organization structure (see chapter "Add agents from organization structure", p. 15).
	<i>Add</i>	Opens a window in which you can select agents who are not necessarily contained in an organization structure (see chapter "Add agents", p. 16).
	<i>Remove</i>	Removes the selected agents from the list.

4.4.3 Tab Dependencies to Training Packages



The tab *Dependencies to Training Packages* is only active if a quiz template has been selected in the tab *Details*.

Here, you can define dependencies to training packages. Depending on the result in the quiz, the respective agents are automatically assigned the selected training package.

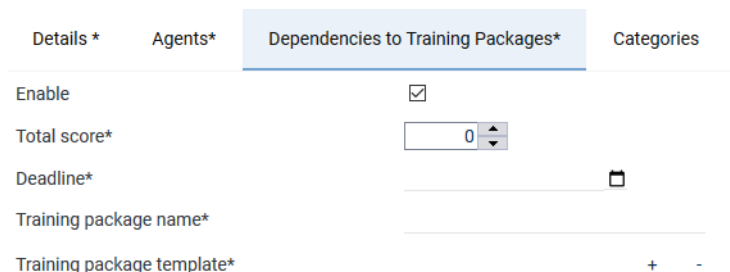




Fig. 38: Assign quiz - tab Dependencies to Training Packages

<i>Enable</i>	<p>Enabling dependencies to training packages.</p> <p><input checked="" type="checkbox"/> = Dependencies to training packages have been enabled.</p> <p><input type="checkbox"/> = Dependencies to training packages have not been enabled.</p>
<i>Total score</i>	<p>Threshold value for the assignment of the training package. If this score is not reached as quiz result, then the training package is automatically assigned to the respective agent.</p> <p>Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.</p> <p>NOTICE! Which threshold values are advisable depends on the rating scheme of the selected quiz template.</p>
<i>Deadline</i>	<p>Date on which the training package has to be finalized.</p> <p>You can enter the date directly in the entry field via the keyboard or via the icon .</p> <p>NOTICE! The deadline for the training package may not be before the deadline of the quiz.</p>
<i>Training package name</i>	<p>Name of training package</p> <p>The training package mustn't have been created yet. If the defined total score is not reached in the quiz, the training package mentioned below will automatically be created and assigned to the agent.</p>
<i>Training package template</i>	<p>Training package template which is used for the training package.</p> <p>Select which training package template will be used for the training package (see chapter "Add training package template", p. 32).</p>

4.4.3.1 Add training package template

1. Click on the button  on the right of the field *Training package template*.
2. Select a template from the list.

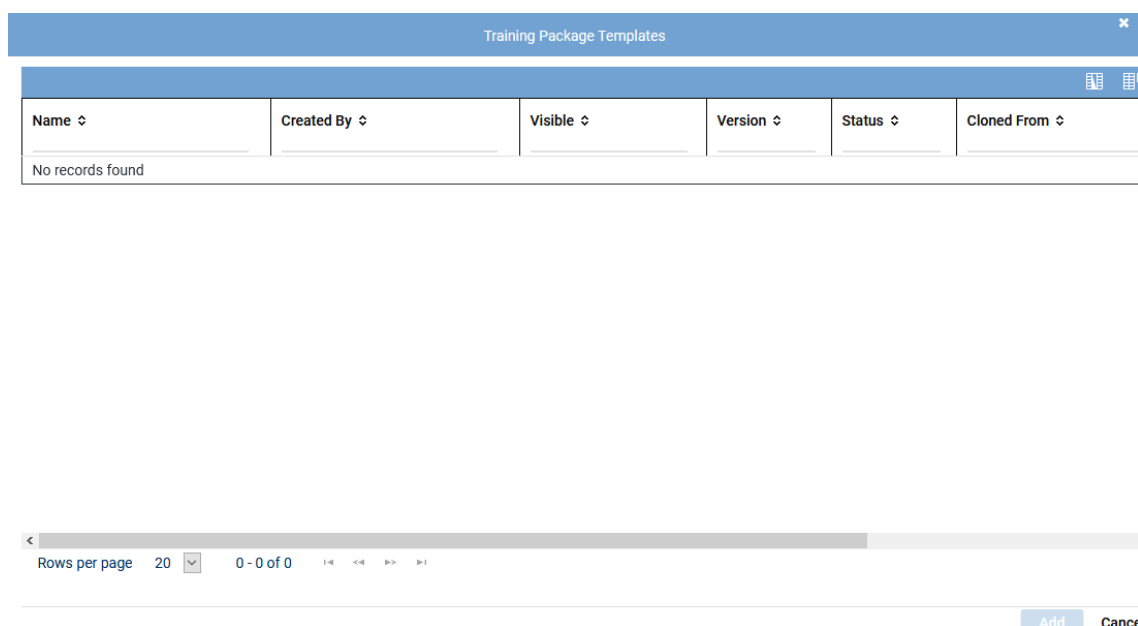


Fig. 39: Add training package template



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

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

4.4.4

Tab Categories

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

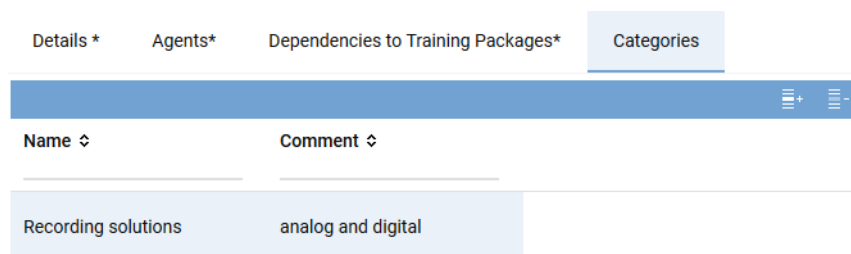




Fig. 40: Assign quiz - tab Categories

	<i>Add</i>	Opens a window in which you can select and add categories, see chapter "Assign category", p. 12 .
	<i>Remove</i>	Removes the selected category from the list.



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

4.5

View quiz



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 [chapter "Tab Details", p. 30](#)).

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.

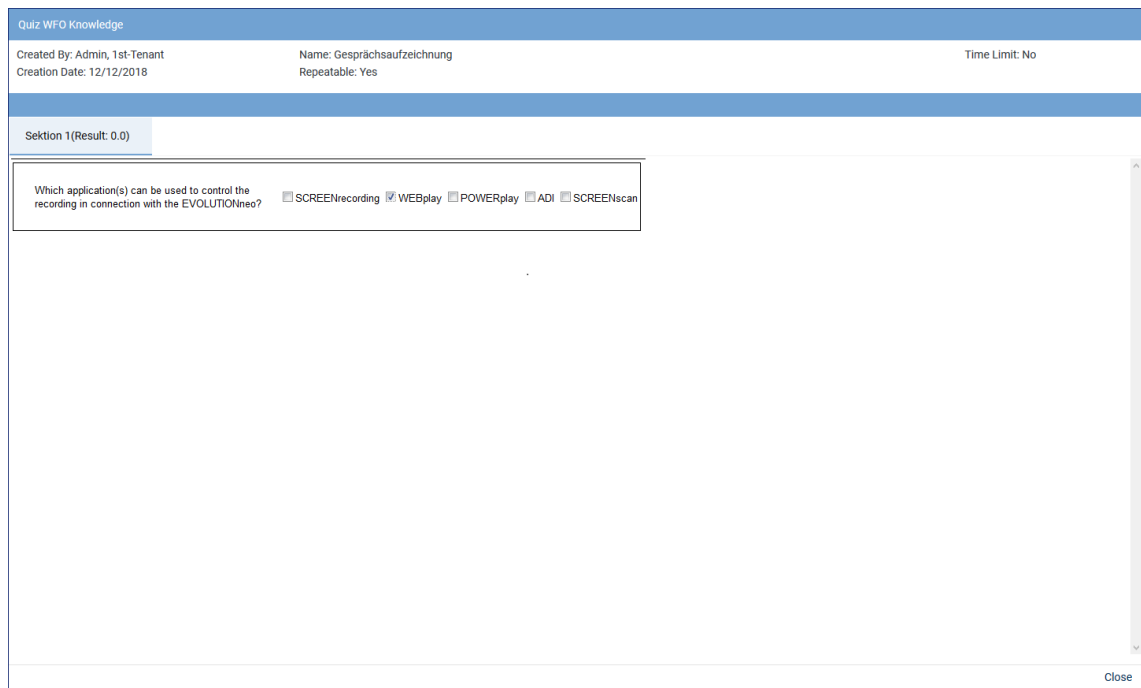


Fig. 41: View quiz (example)

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*.

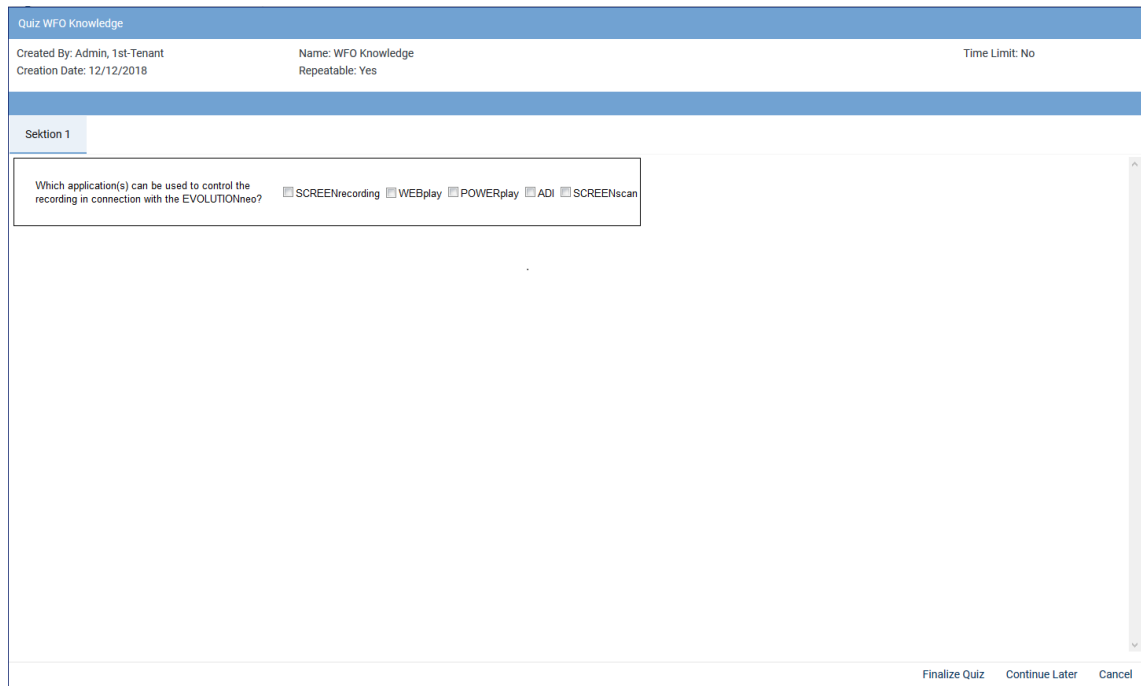
4.6

Start quiz



A quiz can only be started by the agent to whom it has been assigned.

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*.



Quiz WFO Knowledge

Created By: Admin, 1st-Tenant Name: WFO Knowledge Time Limit: No
 Creation Date: 12/12/2018 Repeatable: Yes

Sektion 1

Which application(s) can be used to control the recording in connection with the EVOLUTIONneo? ☐ SCREENrecording ☐ WEBplay ☐ POWERplay ☐ ADI ☐ SCREENscan

Finalize Quiz Continue Later Cancel

Fig. 42: 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:

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

5

Coaching Advisor module

5.1

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 *CLIENTcommand*, see user manual *CLIENTcommand*. They are displayed in the Coaching Advisor module only and can only be re-played 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. 41](#).

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.

5.2

Main view
















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

Coaching Advisor - General						
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

Rows per page: 50 1 - 5 of 5

Fig. 43: Coaching Advisor - main view (example)

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

<i>Conversation Type</i>	<p>Displays the type of the conversation.</p> <p> = call</p> <p> = work item</p> <p> = audio and screen</p> <p> = text</p> <p> = chat</p>
<i>Coaching Advisor Session</i>	<p>Shows whether the session is a coaching advisor session. This session is only visible in the Coaching Advisor module.</p> <p> = coaching advisor session</p> <p> = not a coaching advisor session</p>
<i>Training Session</i>	<p>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.</p> <p> = training session</p> <p> = no training session</p>
<i>Released</i>	<p>Shows whether the session is visible for other users and whether it has been released for replay.</p> <p> = released</p> <p> = not released</p>
<i>Session Start Time</i>	Shows the start time of the session.
<i>Session End Time</i>	Shows the end time of the session.
<i>Session Duration</i>	Shows the duration of the session.
<i>Call Direction</i>	<p>Call direction of the session</p> <p> = incoming</p> <p> = outgoing</p> <p> = transferred</p> <p> = unknown</p>
<i>Conversation Direction</i>	<p>Conversation direction of the session.</p> <ul style="list-style-type: none"> • <i>Internal</i> • <i>Unknown</i>
<i>Agent</i>	Name of the agent who has recorded the session.
<i>Comment</i>	Shows the comments about the session in text.
<i>Hold Time</i>	Shows how long the session was "on hold".
<i>Wrap-up Time</i>	Time needed for the post-editing.
<i>Session Transfers</i>	Number of session transfers.
<i>Creation Date</i>	Date on which the session was saved.
<i>Updated</i>	Date on which the session was updated for the last time.

5.2.1 Toolbar

The toolbar offers the following functions.

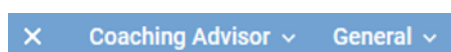



Fig. 44: Coaching Advisor module - toolbar

	 <i>Delete</i>	<p>Deletes the selected session.</p> <p>A coaching advisor session can only be deleted if it has been released and if the user has the function right <i>Can administrate own CA sessions</i> or <i>Can administrate all CA sessions</i>.</p> <p>Training sessions are created in the Sessions module and can only be deleted there, too.</p>
	<i>Coaching Ad-visor Load</i>	<p>Loads the selected session into the Replay module for replay.</p> <p>See chapter "Load session", p. 40.</p> <p>For information about the functions of the Replay module see chapter "Replay module", p. 43.</p>
	<i>Release Session</i>	The selected session is released and can thus be re-played (see chapter "Release session", p. 41).
	<i>Lock Session</i>	The selected session is locked and thus cannot be re-played (see chapter "Lock session", p. 42).
<i>General</i>	<i>Print</i>	Prints the table of the main view.
	<i>Adjust Table</i>	<p>Opens a window in which you can adjust the following settings for the main view:</p> <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page
	<i>Search</i>	<p>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. 9).</p> <p>When opening the module, a search filter is set automatically so that only data sets of the current day are displayed.</p>
	<i>Reset Search</i>	Resets all manually entered search criteria. The search is started without manual filter settings.
	<i>General Help</i>	Via the menu item <i>General Help</i> , a description of the application you are currently viewing is opened.
	<i>Module Help</i>	Via the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened.



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

5.3

Detail view

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

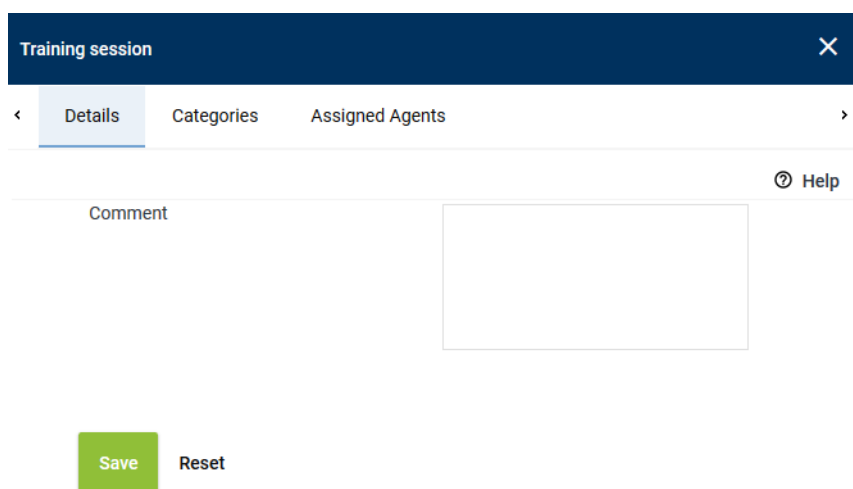


Fig. 45: Coaching Advisor - detail view

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. 39](#).
- **Categories**
Here, you can assign training or session categories to the selected session.
See [chapter "Tab Categories", p. 39](#)
- **Assigned Agents** (only in training sessions)
Here, you can see which agents have been assigned 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. 40](#).

5.3.1 Tab Details

Here, you can enter and save a comment about the session.

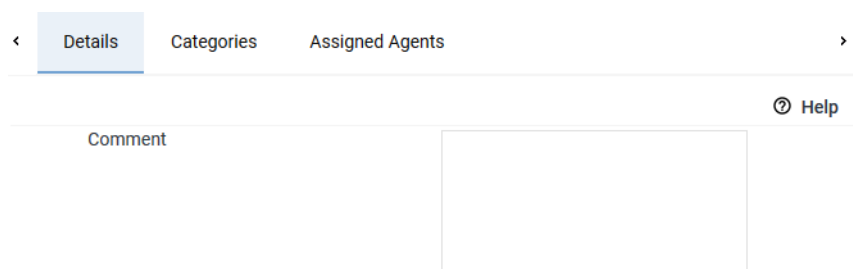


Fig. 46: Tab Details

5.3.2 Tab Categories

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



Details **Categories** Assigned Agents

Session Categories	
Name ↕	Comment ↕
Vertragsabschluss	

E-Learning Categories	
Name ↕	Comment ↕
Sales	

Fig. 47: 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. 12).
	Remove	Removes the selected category from the list.

5.3.3 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.

< Details Categories **Assigned Agents** >

Last Name ↕	First Name ↕
Agent	10.

Fig. 48: Tab Assigned Agents

5.4 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	<p>The entire recorded session is loaded into the Replay module.</p> <p>If a screen recording has been saved, then the screen video is displayed in the Video Viewer of the Replay module.</p>
-----------------	--

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

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. 43](#).



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

5.5

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. 42](#).

5.6 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. 41](#).

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. 56](#). 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. 58](#).

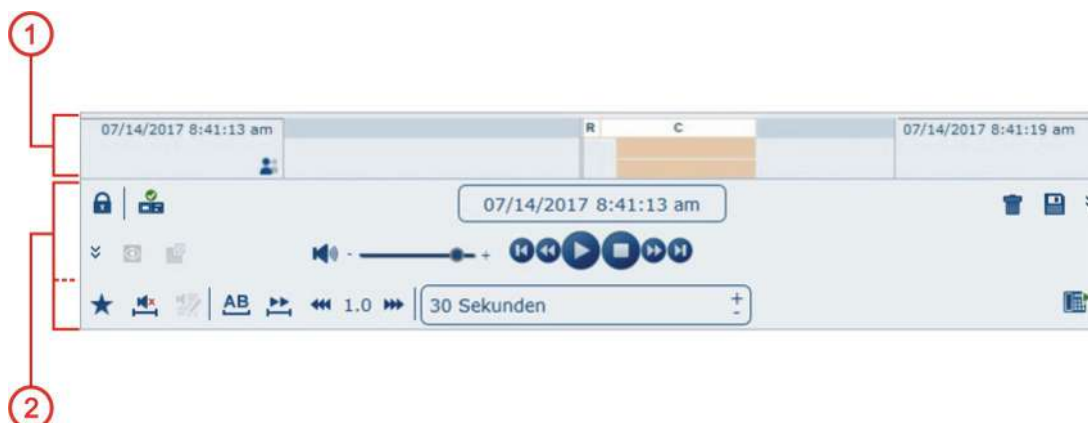




Fig. 49: Welcome screen (example)

1	Replay bar	Shows the loaded conversations, see chapter "Replay bar", p. 43 .
2	Functionality bar	Contains functionalities for the loaded conversations in the replay bar, see chapter "Functionality bar", p. 46 .

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).

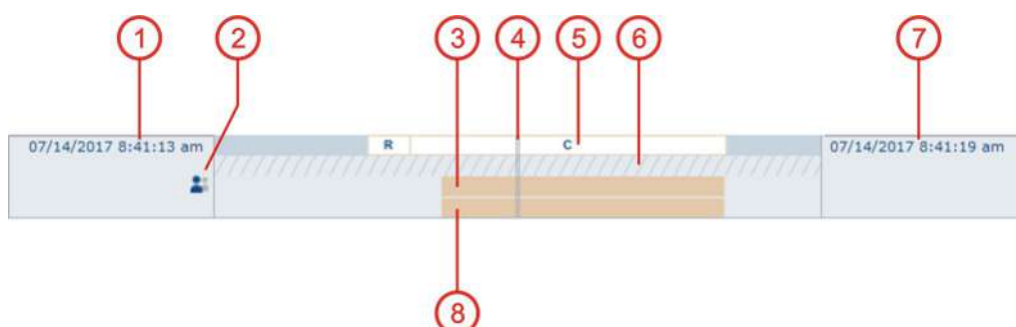


Fig. 50: Replay bar in the full view

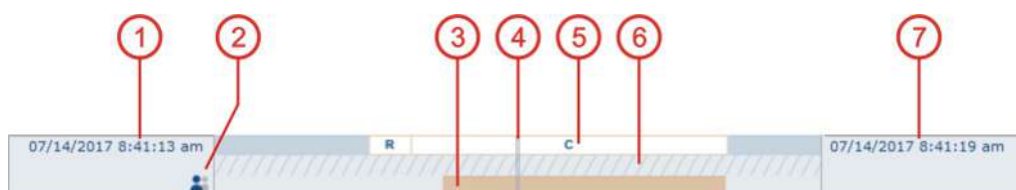







Fig. 51: Replay bar in compressed view

- 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. 45.](#)
- 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. 45.](#)

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.

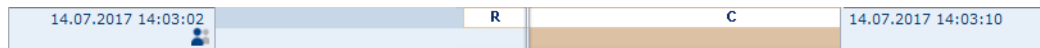


Fig. 52: Meta data loaded completely

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

⇒ The conversation cannot be replayed.



Fig. 53: 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. 54: 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. 55: 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. 56: 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.

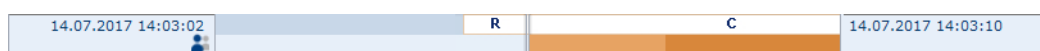


Fig. 57: Data buffer empty/loading

7. Red = Data buffer not loaded completely.

⇒ The conversation is defective and cannot be replayed.

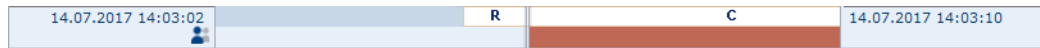


Fig. 58: Data buffer not loaded completely

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.

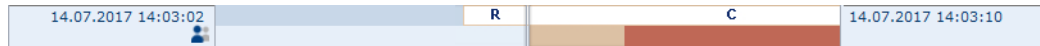


Fig. 59: Data buffer not loaded completely

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.

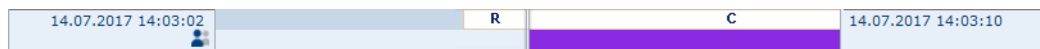


Fig. 60: Packet is muted during the recording

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. 61: Conversation section muted

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

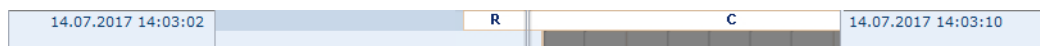


Fig. 62: The recording contains data which is not supported.

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. 63: 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 unsuspecting 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.

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

	<i>Volume</i>	<p>Adjusts the general replay volume.</p> <p>To change the volume, click on the slider, hold the mouse key down and move the slider to the left or to the right.</p>
	<i>Clear playlist</i>	Removes all loaded conversations from the Replay module.
	<i>Export all loaded elements</i>	Saves the audio data of the loaded conversations as WAVE file and the corresponding additional conversation data as CSV file on the hard disk of your computer, see chapter "Export all loaded elements", p. 49 .
	<i>Create new bookmark</i>	Sets a bookmark or marks the beginning of a conversation section at the current replay position, see chapter "Create new bookmark", p. 51 .
		Sets a bookmark or 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. 51 .
	<i>Create new mute notification</i>	Marks the beginning of a conversation section at the current replay position in order to mute selected participants, see chapter "Create new mute notification", p. 53 .
		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. 53 .
	<i>Loop</i>	Marks the beginning of a replay loop at the current replay position, see chapter "Mark replay loop", p. 55 .
		Marks the end of a replay loop at the current replay position, see chapter "Mark replay loop", p. 55 .
		Removes the taggings of the replay loop, see chapter "Mark replay loop", p. 55 .
	<i>Skip silence</i>	Shows that the automatic skipping of times of silence between individual conversations has been deactivated.
		Shows that the automatic skipping of times of silence between individual conversations has been activated.
		<p>Shows the current replay speed.</p> <p>The replay speed can be adjusted between 0.5 and 2.0.</p> <p>To reduce the replay speed, click on the icon  <i>Reduce replay speed</i>.</p> <p>To increase the replay speed, click on the icon  <i>Increase replay speed</i>.</p>
	<i>Replay via phone</i>	Shows that the conversation replay via phone has been deactivated.
		Shows that the conversation replay via phone has been activated.

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

1 Minute 

Shows the time window for the loaded conversations.

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

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

20.11.2018 11:33:36

Shows the current replay position.

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

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

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

Icons in the functionality bar on the right



Expanded view

Switches the replay bar to full view.



Simple view

Switches the replay bar to compressed view.

Icons in the functionality bar on the left



Display toolbar

Shows all icons in the functionality bar



Hide toolbar

Partly hides the icons in the functionality bar.



Not all described icons exist in every module and application.

6.2.2

Export all loaded elements

1. Click on the icon  (*Export all loaded elements*).

⇒ The following window appears:



Fig. 64: Save as

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

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

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

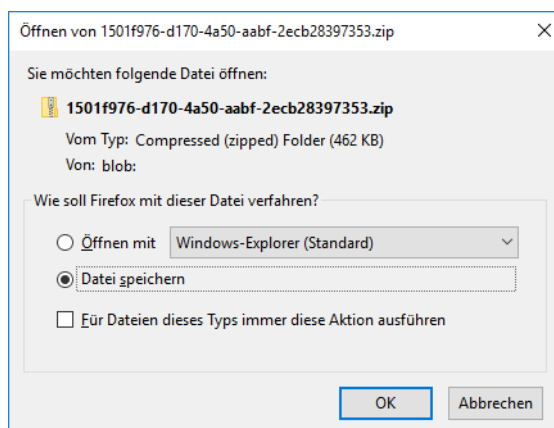


Fig. 65: Save conversations

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



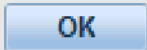

The current replay position has to be located within the conversation.

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. 66: Tagging editor

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

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



Fig. 67: Tagging editor with entered comment (example)

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



Fig. 68: Conversation with tagged conversation section (example)

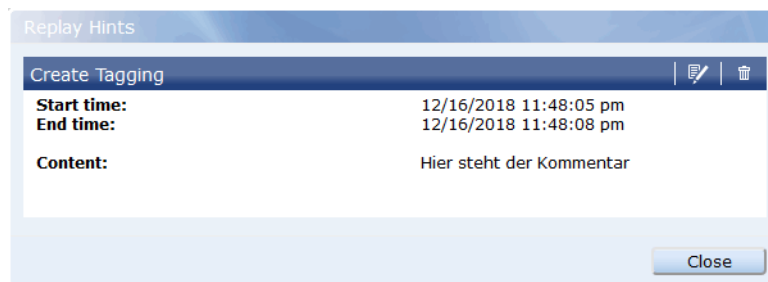


Fig. 69: Displayed information details (example)

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:

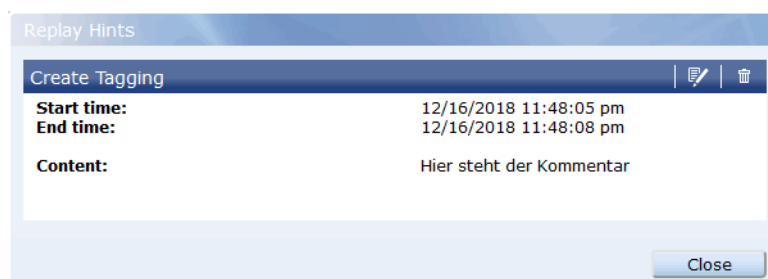



Fig. 70: Displayed information details (example)

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

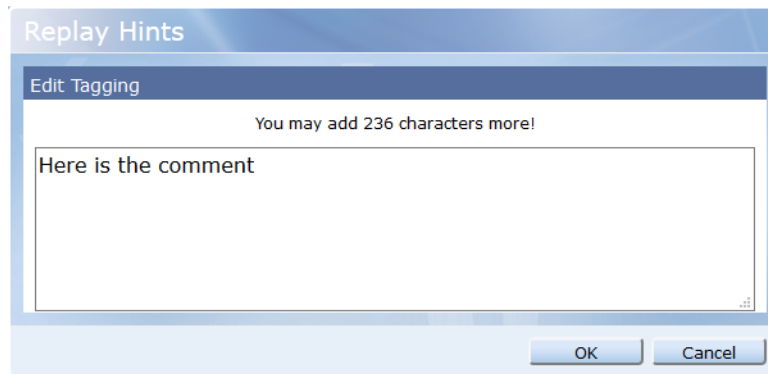
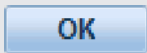



Fig. 71: Edit tagging (example)

	Saves the entries and closes the window.
	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:

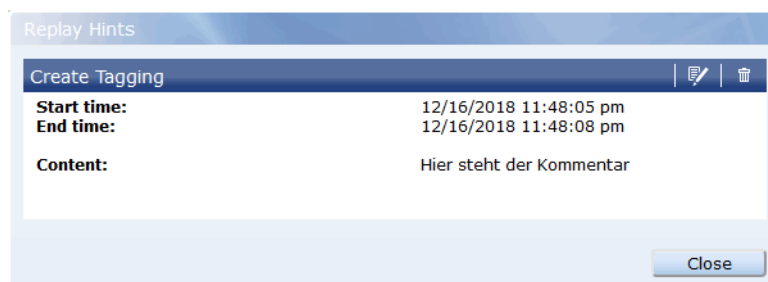



Fig. 72: Displayed information details (example)

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 one 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:

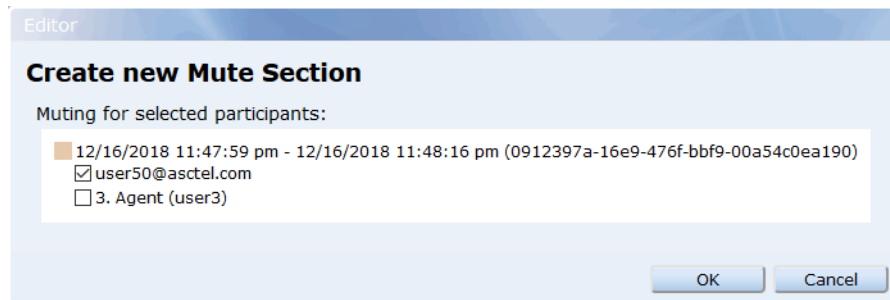
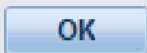



Fig. 73: Muting for selected participants (example)

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

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

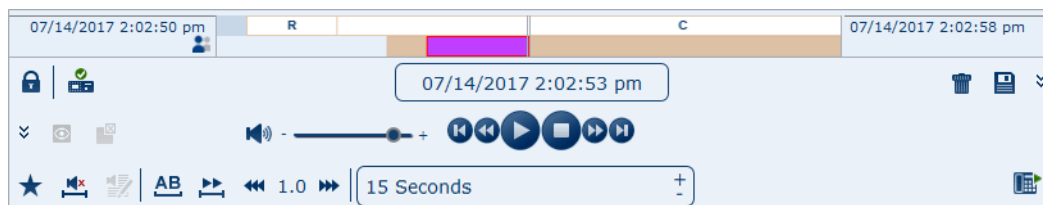


Fig. 74: Conversation with muted conversation section (example)

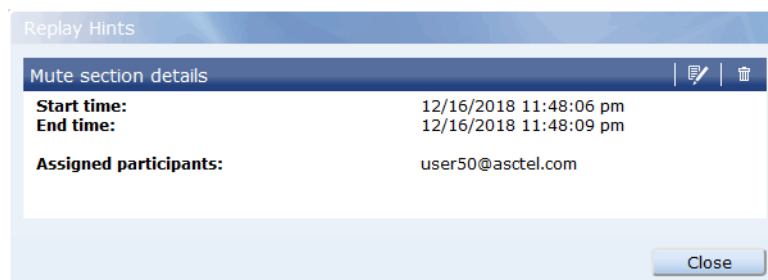


Fig. 75: Displayed mute section details (example)

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:

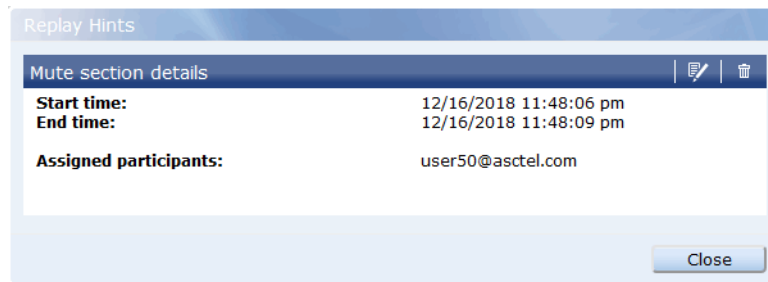



Fig. 76: Mute Section Details (example)

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

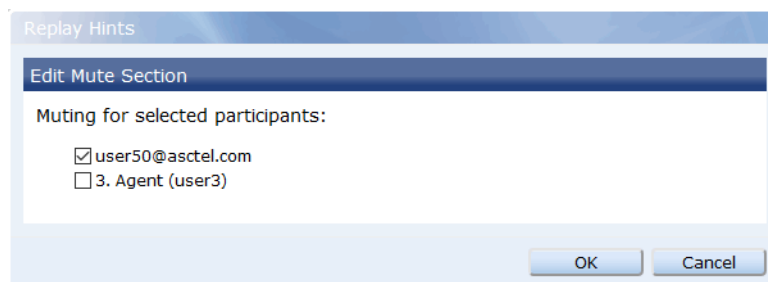
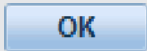



Fig. 77: Edit mute section (example)

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

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

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:

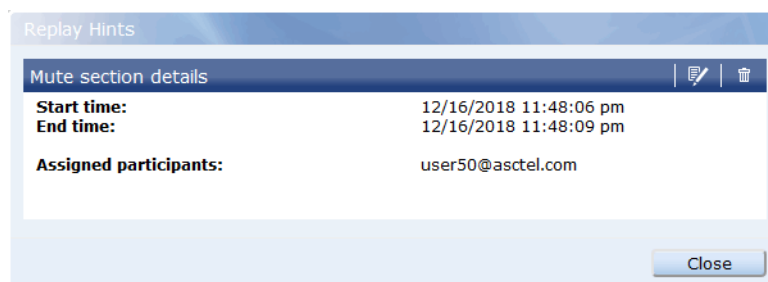





Fig. 78: Mute Section Details (example)

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  (Loop).

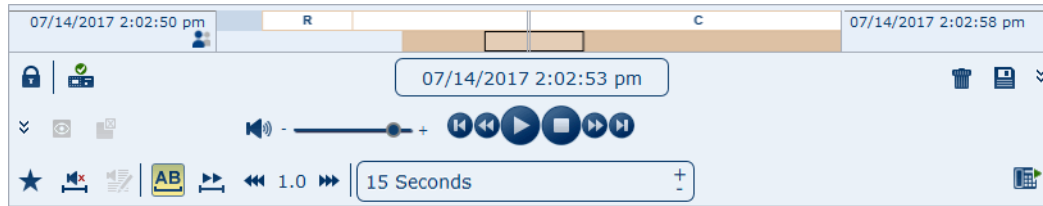


Fig. 79: Conversation with replay loop

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.

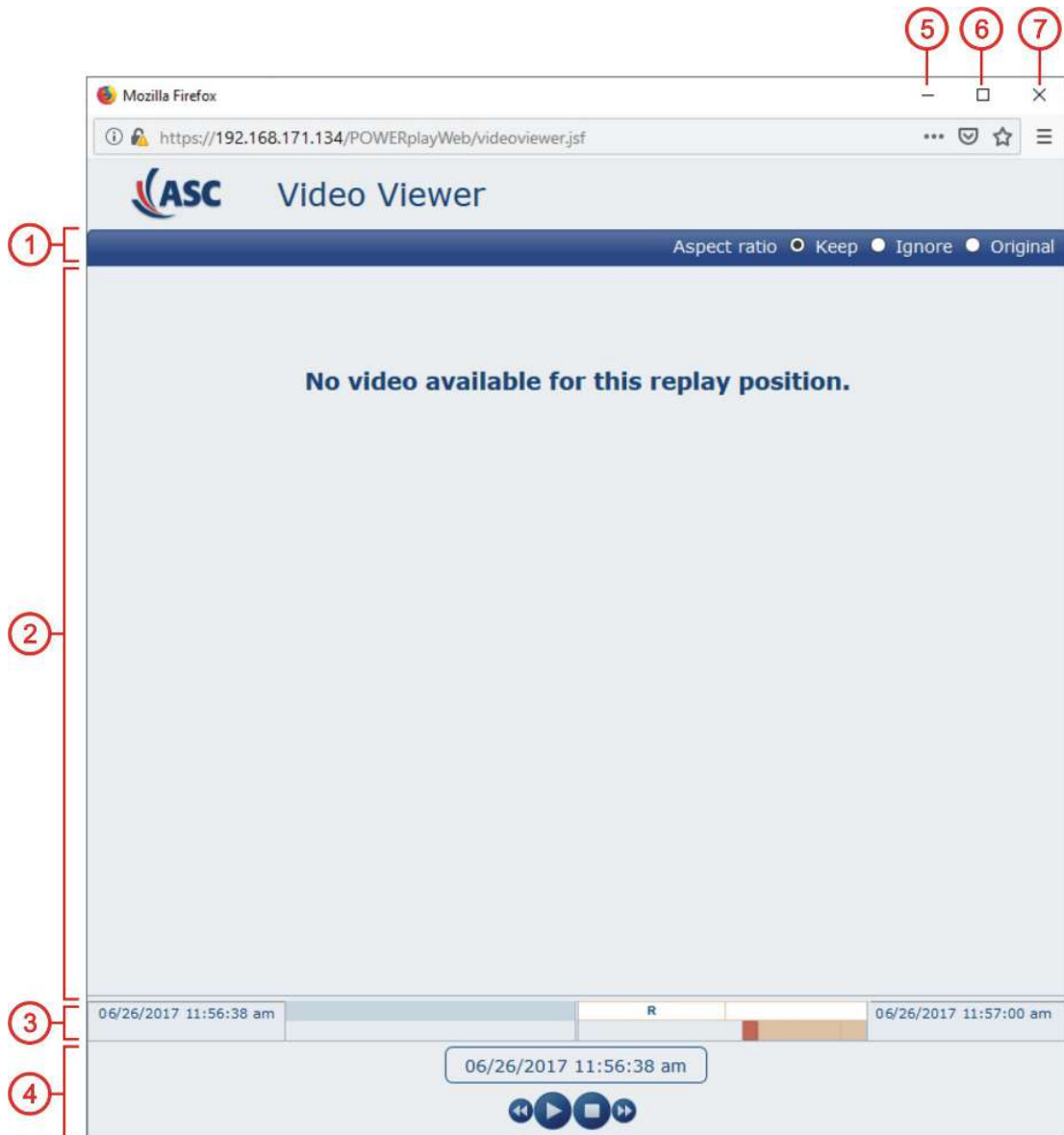






Fig. 80: Video Viewer (example)

1	Option bar	Contains settings for displaying video recordings, see chapter "Option bar", p. 57 .
2	Main view	Shows the Video recording .
3	Replay bar	Shows the loaded video recordings, see chapter "Replay bar", p. 57 .
4	Functionality bar	Contains functionalities for the loaded conversations in the replay bar, see chapter "Icons", p. 47 . 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. 81: Option bar

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

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

6.3.2 Replay bar

The replay bar shows the loaded video recordings.

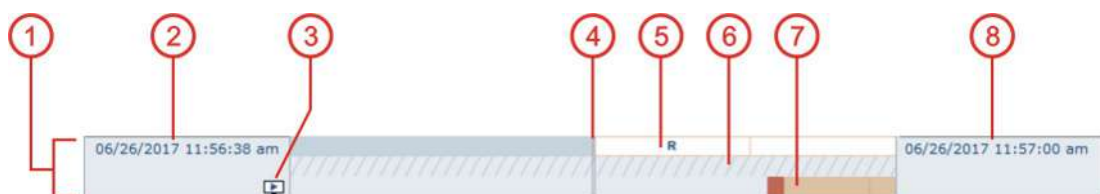


Fig. 82: Replay bar

1	Shows the track of a loaded video recording .
2	Shows the start time of the loaded conversation. If several conversations have been loaded in 1 track, the start time of the earliest conversation is displayed here.
3	Shows that this is the track of a video recording .
4	Shows the replay position. To change the current replay position of the loaded conversation, you have 2 possibilities: <ol style="list-style-type: none"> 1. Click on the respective replay position. 2. Click on a track, hold the mouse key down and drag the cursor to the left or to the right.
5	Shows the sections of the conversation. The following sections are possible: <ul style="list-style-type: none"> • R = Ringing (a connection is being established) • C = Connected (at least 2 participants are calling each other) • H = Hold (a participant is on hold) • Q = Queued (a participant has been queued) • W = Wrap-up (wrap-up time)
6	Shows tagging and audio analysis data (e. g. found keywords). The line is only displayed if information is available.
7	Shows the conversation. For further information see chapter "Display of the loading states", p. 45 .
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).

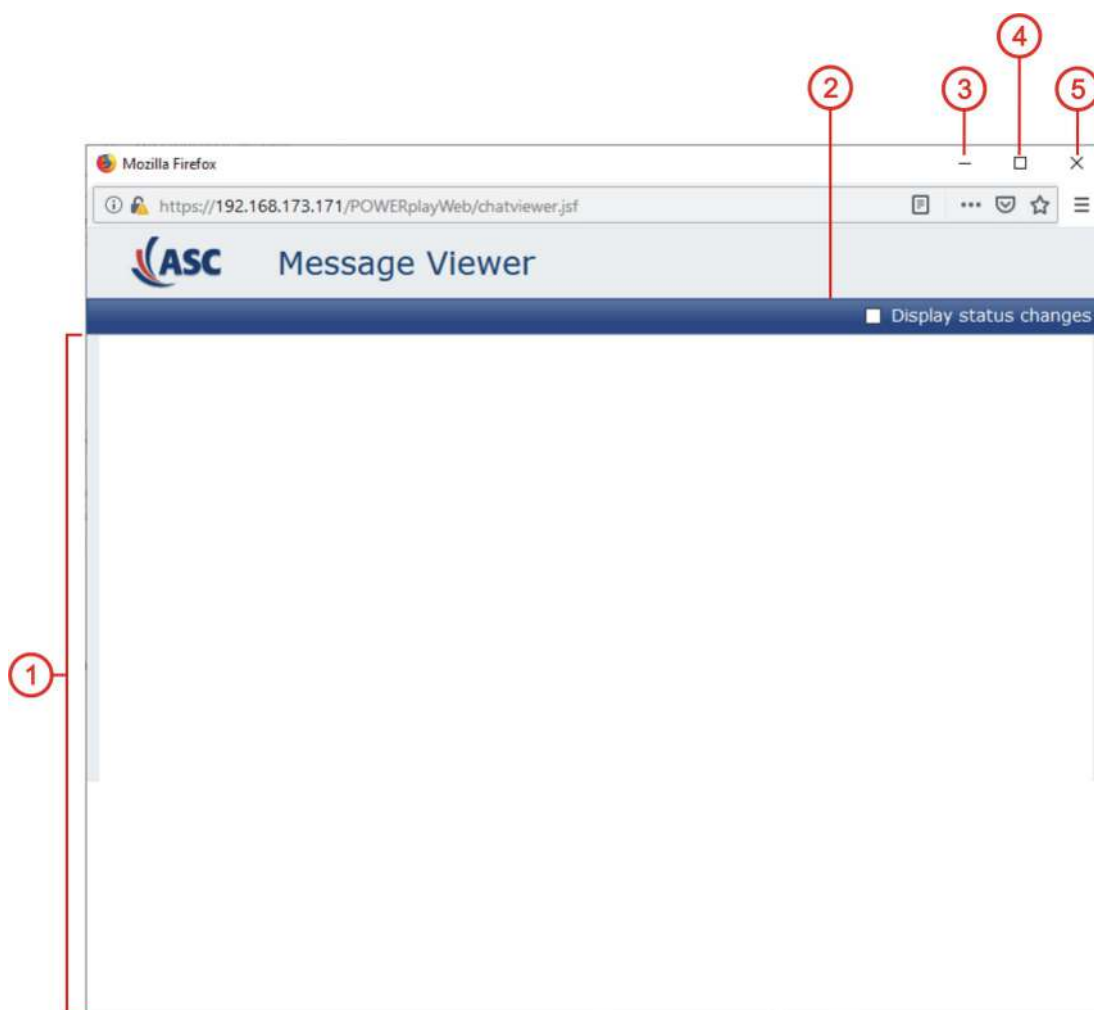






Fig. 83: Message Viewer

1	Main view	Displayed chat texts or text messages. See chapter "Main view", p. 59 .
2	<i>Display status changes</i>	<input checked="" type="checkbox"/> = Displays the status changes. <input type="checkbox"/> = Does not displays the status changes.
3	 (Minimize)	Minimizes the on-screen display to the program icon in the taskbar.
4	 (Maximize)	Maximizes the on-screen display to full-screen size.
	 (Reconstruct)	Reduces the on-screen display to the most recently selected reduced window size.
5	 (Close)	Closes the window of the Message Viewer.

6.4.1 Main view

The main view displays chat texts or text messages.

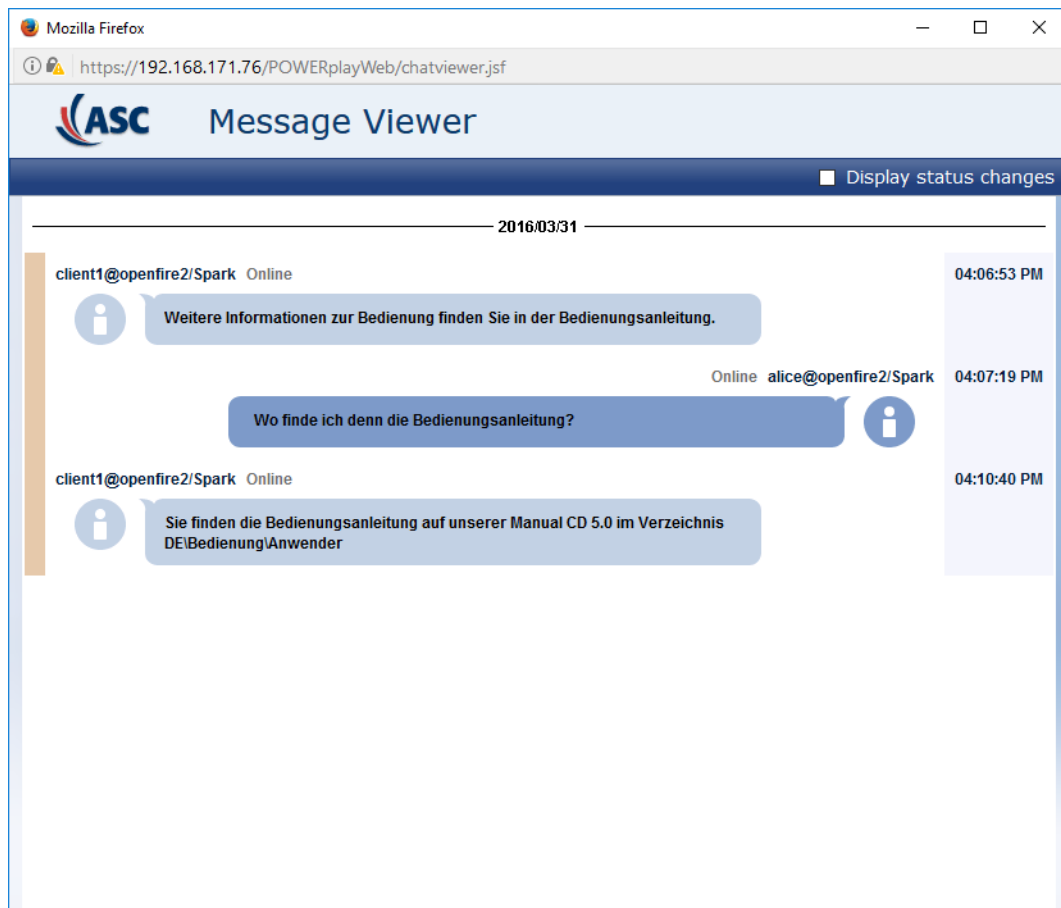


Fig. 84: Message Viewer without the display of the status changes (example)

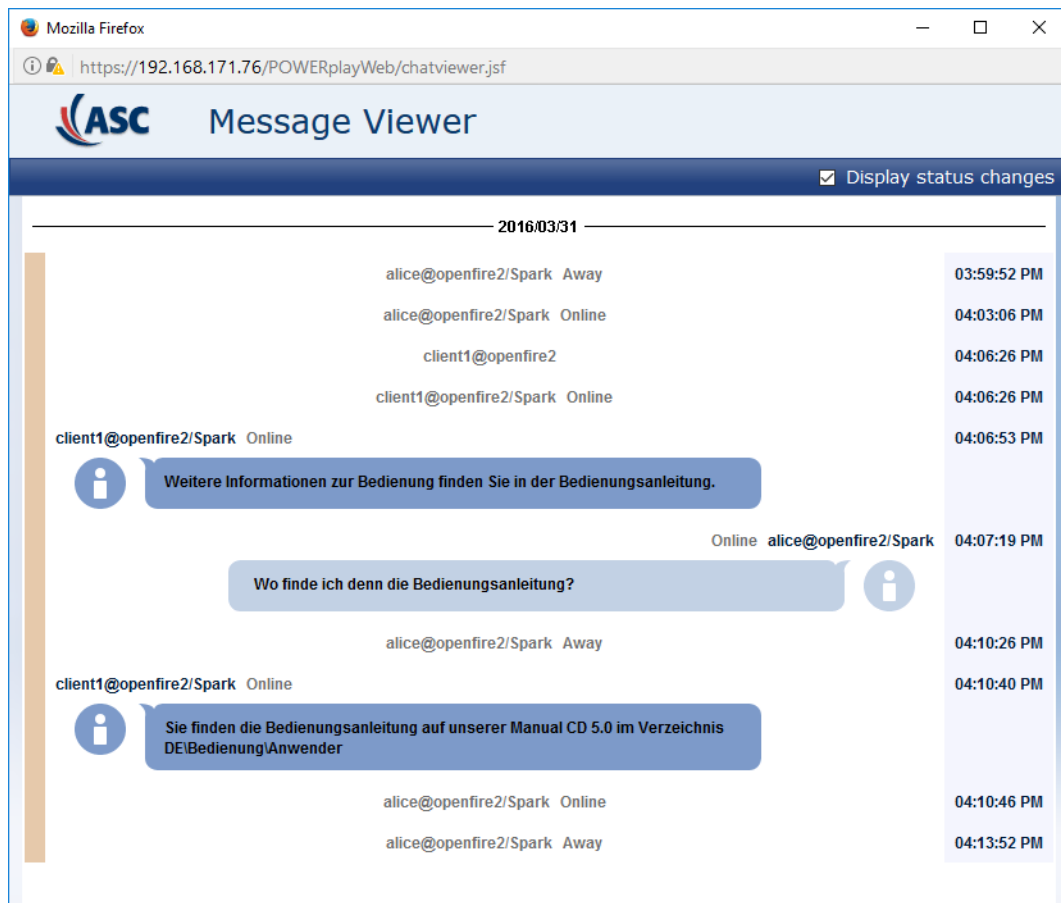


Fig. 85: Message Viewer with the display of the status changes (example)

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

Fig. 1	Training packages - main view (example).....	7
Fig. 2	Training Packages module - toolbar of the main view	8
Fig. 3	Window Search Criteria (example)	9
Fig. 4	Training packages - detail view.....	10
Fig. 5	Tab Details	11
Fig. 6	Tab E-Learning Categories (example)	11
Fig. 7	Add categories	12
Fig. 8	Select categories.....	12
Fig. 9	Enter agent feedback	13
Fig. 10	Assign Training Package	13
Fig. 11	Tab Details	14
Fig. 12	Tab Details	14
Fig. 13	Add training package template.....	14
Fig. 14	Tab Agents	15
Fig. 15	Agents	15
Fig. 16	Add agents from organization structure	16
Fig. 17	Agents (example)	16
Fig. 18	Add own agents	17
Fig. 19	Assign training package (example).....	17
Fig. 20	Tab Details (example)	18
Fig. 21	Select training package (example).....	18
Fig. 22	View training package (example: accepted training package)	19
Fig. 23	Select training package (example).....	19
Fig. 24	View training package (example: accepted training package)	20
Fig. 25	Select training package (example).....	21
Fig. 26	Evaluations.....	21
Fig. 27	Quiz - main view (example).....	24
Fig. 28	Quiz module - toolbar	24
Fig. 29	Quiz - detail view	26
Fig. 30	Tab Details - assigned quiz.....	26
Fig. 31	Group field Dependent Training Package	27
Fig. 32	Tab Properties - assigned quiz	28
Fig. 33	Tab Categories - assigned quiz	29
Fig. 34	Create and assign quiz	29
Fig. 35	Assign quiz - tab Details.....	30
Fig. 36	Add quiz template	31
Fig. 37	Assign quiz - tab Agents	31
Fig. 38	Assign quiz - tab Dependencies to Training Packages.....	32
Fig. 39	Add training package template.....	33
Fig. 40	Assign quiz - tab Categories	33
Fig. 41	View quiz (example).....	34

Fig. 42	Quiz (example).....	35
Fig. 43	Coaching Advisor - main view (example).....	36
Fig. 44	Coaching Advisor module - toolbar	37
Fig. 45	Coaching Advisor - detail view	39
Fig. 46	Tab Details	39
Fig. 47	Tab Categories.....	40
Fig. 48	Tab Assigned Agents	40
Fig. 49	Welcome screen (example)	43
Fig. 50	Replay bar in the full view	43
Fig. 51	Replay bar in compressed view	43
Fig. 52	Meta data loaded completely	45
Fig. 53	Meta data for the recording is missing	45
Fig. 54	Defective packet in the meta data of the recording (full view).....	45
Fig. 55	Missing packet in the meta data of the recording (full view)	45
Fig. 56	Defective or missing packet in the meta data of the recording (compressed view)	45
Fig. 57	Data buffer empty/loaded	45
Fig. 58	Data buffer not loaded completely	46
Fig. 59	Data buffer not loaded completely	46
Fig. 60	Packet is muted during the recording.....	46
Fig. 61	Conversation section muted.....	46
Fig. 62	The recording contains data which is not supported.....	46
Fig. 63	Emotions detected in a conversation (example)	46
Fig. 64	Save as	50
Fig. 65	Save conversations	50
Fig. 66	Tagging editor	51
Fig. 67	Tagging editor with entered comment (example).....	52
Fig. 68	Conversation with tagged conversation section (example).....	52
Fig. 69	Displayed information details (example)	52
Fig. 70	Displayed information details (example)	52
Fig. 71	Edit tagging (example)	53
Fig. 72	Displayed information details (example)	53
Fig. 73	Muting for selected participants (example)	54
Fig. 74	Conversation with muted conversation section (example).....	54
Fig. 75	Displayed mute section details (example).....	54
Fig. 76	Mute Section Details (example)	55
Fig. 77	Edit mute section (example).....	55
Fig. 78	Mute Section Details (example)	55
Fig. 79	Conversation with replay loop	56
Fig. 80	Video Viewer (example).....	56
Fig. 81	Option bar	57
Fig. 82	Replay bar.....	57
Fig. 83	Message Viewer.....	59

Fig. 84	Message Viewer without the display of the status changes (example).....	60
Fig. 85	Message Viewer with the display of the status changes (example).....	60

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.