

INSPIRATION^{neo}

Templates module



User manual

5/17/2019

Product line neo, version 6.x

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

INSPIRATION^{neo}

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

Copyright © 2019 ASC Technologies AG. All rights reserved.

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

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

Contents

1	General information	5
2	Introduction	6
3	Calculation of the evaluation score.....	7
4	Toolbar of the main view	8
4.1	Show preview	9
4.2	Show summary	9
4.3	Search	10
5	Evaluation Templates module	12
5.1	General	12
5.2	Main view	13
5.3	Detail view	14
5.3.1	Tab Details	15
5.3.2	Tab Evaluations	17
5.3.2.1	Show evaluations	18
5.3.3	Tab Logical Dependencies.....	19
5.3.4	Tab Quality Alarms.....	19
5.3.5	Tab Activate	21
5.3.5.1	Upload and add new audio file	22
5.3.5.2	Add agent.....	24
5.4	Create template.....	25
5.5	Edit template	27
5.5.1	Edit or create logical dependencies	29
5.5.1.1	Change logical dependency	31
5.5.1.2	Delete logical dependencies	32
5.5.2	Edit or create specific quality alarm	33
5.5.2.1	Tab Details	34
5.5.2.2	Tab Time Settings	36
5.5.2.3	Tab Notifications	36
5.5.2.4	Tab Agents	40
5.5.3	Delete specific quality alarm	42
6	Training Package Templates module	43
6.1	General	43
6.2	Main view	43
6.3	Detail view	44
6.3.1	Tab Details	45
6.3.2	Tab E-Learning Categories	46
6.4	Create template.....	47
6.5	Edit template	48
6.5.1	Assign existing category	49

6.5.2	Remove category assignment.....	50
6.5.3	Create and add new category	50
6.5.4	Delete category	51
7	Quiz Templates module	53
7.1	General	53
7.2	Main view	53
7.3	Detail view	54
7.3.1	Tab Details	54
7.3.2	Tab E-Learning Categories	55
7.3.3	Tab Quality Alarms.....	56
7.4	Create template.....	57
7.5	Edit template	58
7.5.1	Assign existing category	59
7.5.2	Remove category assignment.....	60
7.5.3	Create and add new category	60
7.5.4	Delete category	62
7.5.5	Edit or create specific quality alarm	63
7.5.5.1	Tab Details	63
7.5.5.2	Tab Time Settings	65
7.5.5.3	Tab Notifications	65
7.5.5.4	Tab Agents.....	69
7.5.6	Delete specific quality alarm	71
	List of figures	72
	List of tables	75
	Glossary	76

1 General information

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

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

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

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

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

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

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

2 Introduction

In the Templates module, you can create templates adjusted to your individual requirements to be used in different cases of application and administrate already existing templates.

The following templates can be created:

- Evaluation templates and customer survey templates, see [chapter "Evaluation Templates module", p. 12](#)
- Training package templates, see [chapter "Training Package Templates module", p. 43](#)
- Quiz templates, see [chapter "Quiz Templates module", p. 53](#)

Open the respective module by clicking on the corresponding sub-menu item in the navigation bar in the menu item *Templates*.

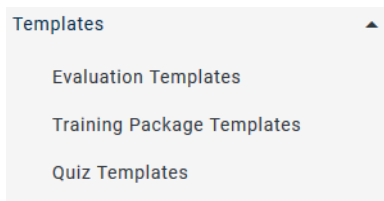


Fig. 1: Menu item Templates



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

3

Calculation of the evaluation score**Evaluation score of a question:**

(answer value) x (severity) / (100)

Score of a section, several questions with a question severity of 100:

(sum of the evaluation score of all questions) / (number of the questions)

Example for a section:

- 1st question: Severity = 100, Excellent = 100
- 2nd question: Severity = 100, Average = 60

Example for the calculation:

- 1st question: $100 \times 100 / 100 = 100$
- 2nd question: $60 \times 100 / 100 = 60$
- Result: $(100 + 60) / 2 = 80$

Score of a section, several questions with a question severity < 100:

(sum of the evaluation score of all questions)

Example for a section:

- 1st question: Severity = 70, Excellent = 100
- 2nd question: Severity = 30, Average = 60

Example for the calculation:

- 1st question: $100 \times 70 / 100 = 70$
- 2nd question: $60 \times 30 / 100 = 18$
- Result: $70 + 18 = 88$

Score of several sections with the different section severities:

(score of the 1st section) x (severity of the 1st section) / (100) + (score of the 2nd section) x (severity of the 2nd section) / (100)

Example for sections:

- Section 1: Severity = 70
- 1st question: Severity = 70, Excellent = 100
- 2nd question: Severity = 30, Average = 60
- Section 2: Severity = 30
- 1st question: Severity = 100, Average = 60

Example for the calculation:

- 1st section 1st question: $100 \times 70 / 100 = 70$
- 1st section 2nd question: $60 \times 30 / 100 = 18$
- 1st section, score: $70 + 18 = 88$
- 2nd section 1st question: $60 \times 100 / 100 = 60$
- 2nd section, score: 60
- Overall score: $88 \times 70 / 100 + 60 \times 30 / 100 = 79,6$



For information about defining a rating scheme refer to the administration manual for tenants *Rating schemes management*.

4 Toolbar of the main view

The toolbar of the main view offers the following functions in all the 3 modules.



Fig. 2: Toolbar of the main view (example)

	<i>Create</i>	Creates a new template. Templates can be created in the following modules: <ul style="list-style-type: none">Evaluation Templates module, see chapter "Create template", p. 25Training Package Templates module, see chapter "Create template", p. 47Quiz Templates module, see chapter "Create template", p. 57
		<i>Delete</i> Deletes the selected template.
	<i>Evaluation Templates</i>	<i>Remove edit locks</i> Checks whether there is an edit lock for the selected template. If there is a lock, you can remove it by confirming the security prompt.
		<i>Make template visible or not visible</i> By clicking on this button, the user can show or hide the selected template.
		<i>Show preview</i> Shows a preview of the selected template, see chapter "Show preview", p. 9 .
		<i>Summary</i> Shows a summary of the selected template, see chapter "Show summary", p. 9 .
		<i>Print evaluation template</i> Prints the selected template.
<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 informationOrder of the displayed columnsNumber of rows per page
	<i>Save table configuration</i>	Saves the current table configuration of the main view as default view of the user.
	<i>Search</i>	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see chapter "Search", p. 10 .
	<i>Reset search</i>	Resets all manually entered search criteria.
	<i>General help</i>	Opens the online help.
	<i>Module help</i>	Opens the module-specific online help.



Not all described icons exist in every module and application.



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

4.1 Show preview

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

1. Select the template in the main view.
2. Click on the menu item *View preview*.
⇒ The window *Preview* appears.

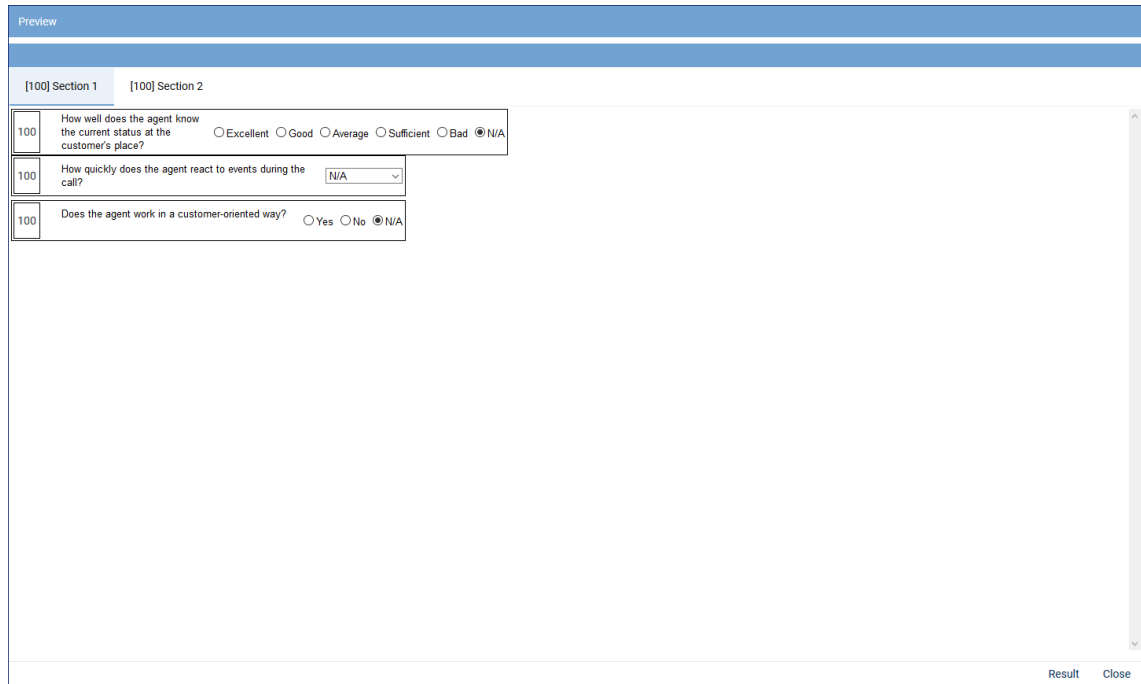


Fig. 3: Preview

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

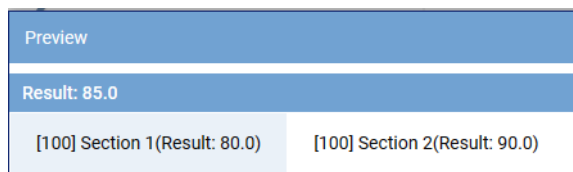


Fig. 4: Preview result

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

4.2 Show summary

This function allows displaying the essential information about a template in a table and printing it.




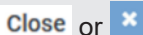

1. Select the template in the main view.
2. Click on the menu item *Evaluations > Summary* in the toolbar of the main view.
⇒ The window *Summary* appears.

Summary ×						
Name	Agent evaluation phone					
Creation date	22.11.2018 06:38:41					
Created by	Admin, 1st-Tenant					
Status	Released					
	Sections	Question Groups	Questions	Severity	Answers	Points (Grade)
▼	Section 1			100		
			How well does the agent work with the voice mailing system?	100		
					Excellent	100
					Good	80
					Average	60
					Sufficient	40
					Bad	0
					N/A	0
			How well does the agent adhere to the telephone guideline?	100		
					Excellent	100
					Good	80
					Average	60
					Sufficient	40
					Bad	0
					N/A	0

Print Close

Fig. 5: Load summary (example)

The following functions are available:

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

4.3

Search

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

- Click on the menu item *General > Search* in the toolbar.
⇒ The window *Search Criteria* appears.

Search Criteria ×				
▼	General			
Creation date	inactive	▼		★
Updated	inactive	▼		★
▶	Evaluation Information			
▶	Agent Information			
▶	Template Information			
▶	Evaluator Information			
^	Search	Reset	Manage Searches	

Fig. 6: Window Search Criteria (example)

- Set the respective search criteria.
NOTICE! It depends on the respective module which search criteria are available.
- 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*.

5 Evaluation Templates module

5.1 General

In the Evaluation Templates module, you can create, edit, and administrate evaluation templates according to your requirements. In addition, it offers you the possibility to generate and administrate templates for customer surveys. Furthermore, users of a Unify [PBX](#) can create customer survey templates here which may be used for polling customers via the Unify Call Director. Precondition is that the administrator has created a corresponding configuration import in the application System Configuration. Evaluation templates and customer surveys are the basis on which the quality of the activity of the agents can be evaluated.

Evaluation templates are forms which are created by supervisors or quality managers. Evaluation templates are used in the Agents module and in the Sessions module to evaluate agents or sessions.

Customer surveys are a combination of questions and their possible corresponding answers. These questions and answers can be communicated to the customer via audio file subsequently to the call. Customers either use the keys of the phone each of which has been associated with a possible answer or an integrated mailbox to give an individual answer or leave a comment; the results are assessed in [INSPIRATION^{neo}](#). If you would like to use the option Customer survey, you need a customer feedback solution.

Creation of an evaluation template

Evaluation templates are created and edited in the template generator. You can select different elements such as different types of questions, comment fields, images or links to create a customized template according to your requirements.

To give the template a clear and readily comprehensible structure, you can define several sections (e. g. one section for each skill to be evaluated).

To guarantee that the different components of the template are represented in a realistic way, you can attribute different severities to the different sections and questions. In addition, different rating schemes can be used which can be created and saved for future use according to individual requirements.

After a template has been created with the template generator, you can select several settings, e. g. whether an agent feedback is supposed to be enabled or whether the template is supposed to be released for direct use.

Furthermore, you can define logical dependencies between questions and answers (e. g. "If question 1 has been answered with answer A, then question 2 has to follow.").

Besides, quality alarms offer the possibility to inform supervisors if an agent does not reach the predefined threshold value in an evaluation with the selected template.

Editing previously released templates

If a template which has already been released for use is supposed to be changed later on, a new version of the template has to be created and released. This process ensures that changes of the basic conditions for evaluations do not go unnoticed. Obsolete versions of templates are deactivated automatically as soon as a new version of this template is released. In addition, templates can be cloned, too, i. e. they serve as a draft for new templates which eliminates the need to select basic settings such as the design once again.

Creating customer survey templates

Templates for customer surveys are created in the Evaluation Templates module, too. The template generator is basically the same as the one used to create evaluation templates. Instead of texts, users upload audio files and define possible answers which are later allocated to number

























keys of the phone so that customers can answer by pressing a key. Alternatively, speech recognition can be used to process the customers' answers. Another option is to integrate a mobile mail box for customers to leave their answers or comments.

As user with the access right for a Templates module you can only access your own templates and the global templates of other users.

5.2

Main view








In the main view, all saved evaluation templates and customer survey templates are displayed.

+ x Evaluation Templates General							
Template Type	Name	Visible	Version	Agent Feedback	Status	Cloned From	New Version Of
	Agent evaluation phone		1				
	Default, Default 80.0 88.33		1				
	Agentenbewertung Telefon		1				
	Call-Director-Kundenumfragen-Vorlage		1				
	Kundenzufriedenheit		1				
	Evaluation team AB campaign xy		1				

Rows per page 50 1 - 6 of 6

Fig. 7: Evaluation templates - main view

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

Template Type	Shows the type of the template.  = evaluation template  = customer survey template
Name	Name of the template
Visible	Shows whether the template is visible for other users.  = Template is visible.  = Template is invisible.
Version	Version number of the template
Agent Feedback	Shows whether the template has been released for agent feedback.
Status	Shows the editing status of the template.  = Template has been released.  = Template is a draft.  = Template has been deactivated.
Cloned From	Name of the template from which this template has been cloned (function <i>Create > Create Clone</i>).
New Version Of	Name of the template which has been the basis for the new template (function <i>Create > Create New Version</i>).
Call Director ID	Shows the Call Director ID.

<i>Creation Date</i>	Shows the date on which the template was created.
<i>Updated</i>	Shows the date on which the template was updated for the last time.

5.3

Detail view

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

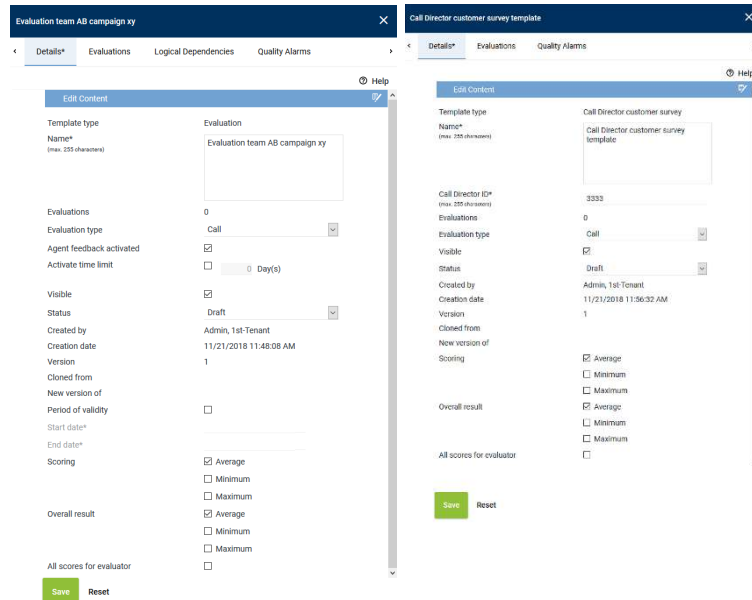


Fig. 8: Evaluation templates - detail view

The detail view consists of the following tabs:

- **Details**
Here, you can display and edit detailed information about the selected template.
See [chapter "Tab Details", p. 15.](#)
- **Evaluations**
Here, all finished evaluations based on the selected template are displayed.
See [chapter "Tab Evaluations", p. 17.](#)
- **Logical Dependencies**
Here, you can display and edit the dependencies between individual elements of the template.
See [chapter "Tab Logical Dependencies", p. 19](#)
- **Activate**
(Only active for customer survey templates)
Here, you can configure and activate a previously saved customer survey template.
See [chapter "Tab Activate", p. 21.](#)
- **Quality Alarms**
Here, you can display and edit threshold values (quality alarms) for evaluations.
See [chapter "Tab Quality Alarms", p. 19](#)

5.3.1 Tab Details

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

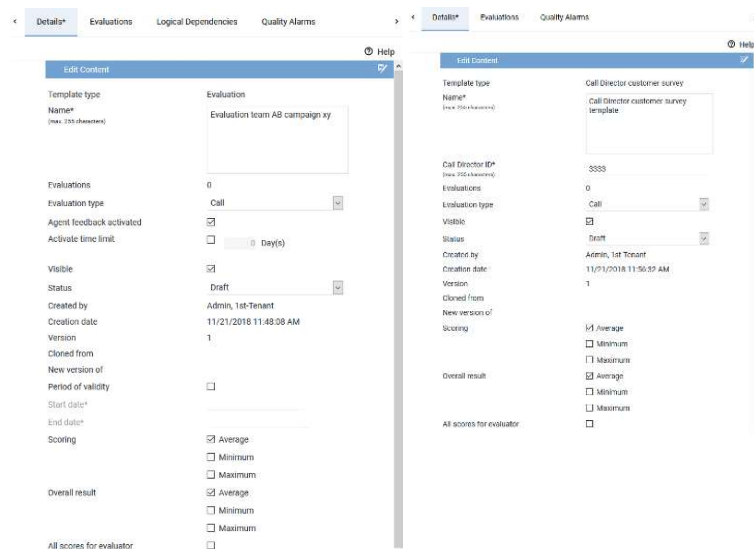



Fig. 9: Details (example)

Template type	Shows the type of the template.
Name	<p>Name of the template. Enter the name of the template here.</p> <p>NOTICE! To avoid confusion, a new template cannot be saved under the same name as an already existing one. Enter an unambiguous name for the template.</p>
Evaluations	Number of the finished evaluations based on the template.
Evaluation type	<p>Shows to which evaluation type the template can be applied.</p> <p>Select for which type of evaluation the template is supposed to be valid.</p> <p>The following evaluation types can be selected:</p> <ul style="list-style-type: none"> • <i>Call</i> (only phone call) • <i>Work item</i> (only screen activity) • <i>Chat</i> • <i>Conversation</i> (phone call including screen activity) <p>NOTICE! The type Chat is only displayed if the respective license is available.</p>
Call Director ID	<p>(Only for Call Director customer survey templates)</p> <p>Shows the ID which serves to map the results to the respective customer survey template.</p> <p>Enter the ID that is used in the Call Director for this customer survey template so that the results can be mapped to the Call Director customer survey template and subsequently be analyzed accordingly.</p>
Agent feedback activated	Shows whether the template has been released for agent feedback.

	<p>If a template has been activated for agent feedback, then every evaluation on the basis of this template has to be confirmed by the agent who is being evaluated.</p> <p>Select whether the agent feedback is supposed to be activated.</p> <p><input checked="" type="checkbox"/> = Agent feedback has been activated.</p> <p><input type="checkbox"/> = Agent feedback has been deactivated.</p>
<i>Activate time limit</i>	Select the time limit in days within which the agents have to submit their feedback. Once the time limit has been exceeded, the evaluation is deemed to have been accepted.
<i>Visible</i>	<p>Shows whether the template is visible for other users.</p> <p>Select whether the template is supposed to be visible.</p> <p><input checked="" type="checkbox"/> = Template is visible.</p> <p><input type="checkbox"/> = Template is invisible.</p>
<i>Status</i>	<p>Shows the editing status of the template.</p> <p>Select the status of the template. Possible options:</p> <ul style="list-style-type: none"> • <i>Draft</i> • <i>Released</i> There can only be 1 released version of a template. • <i>Deactivated</i> (only possible for templates which have already been released) A deactivated template cannot be activated again. To be able to access the contents of a deactivated template, you have to create a new version of the template.
<i>Created by</i>	Name of the user who has created the template.
<i>Creation date</i>	Shows the date on which the template was created.
<i>Version</i>	Version number of the template.
<i>Cloned from</i>	Name of the template from which this template has been cloned (<i>Create > Create Clone</i>).
<i>New version of</i>	Name of the template which has been the basis for this version (<i>Create > Create New Version</i>).
<i>Period of validity</i>	<p>Shows whether a period of validity has been activated for the evaluation template.</p> <p>Select whether a period of validity is supposed to be activated in which the template is displayed in the respective modules.</p> <p>Date = The start date and the end date of the period of validity are defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .</p> <p><input checked="" type="checkbox"/> = Period of validity has been activated.</p> <p><input type="checkbox"/> = Period of validity has not been activated.</p>
<i>Scoring</i>	<p>Shows according to which scheme the score of the section has been calculated. The following options are available:</p> <ul style="list-style-type: none"> • <i>Average</i>: The score is an average value. • <i>Minimum</i>: The lowest score is displayed as score of the section. • <i>Maximum</i>: The highest score is displayed as score of the section.
<i>Overall result</i>	Shows according to which scheme the overall result of the template has been calculated. The following options are available:

- **Average:** The overall result of the template results from the average of all scores that have been achieved in the individual sections.
- **Minimum:** The lowest score that has been reached in a section is displayed as the overall result of the template.
- **Maximum:** The highest score that has been reached in a section is displayed as the overall result of the template.

☒ = Option selected.

☐ = Option not selected.

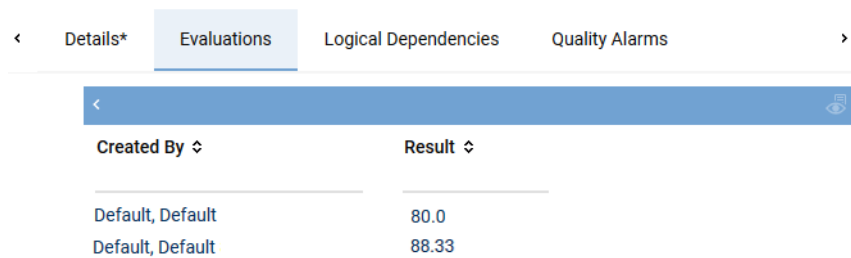
All scores for evaluator Shows whether the evaluator is displayed all values (the average as well as the highest and the lowest scores).

☒ = Evaluator is displayed all values.

☐ = Evaluator is displayed only those values selected under *Scoring* and *Overall result*.

5.3.2 Tab Evaluations

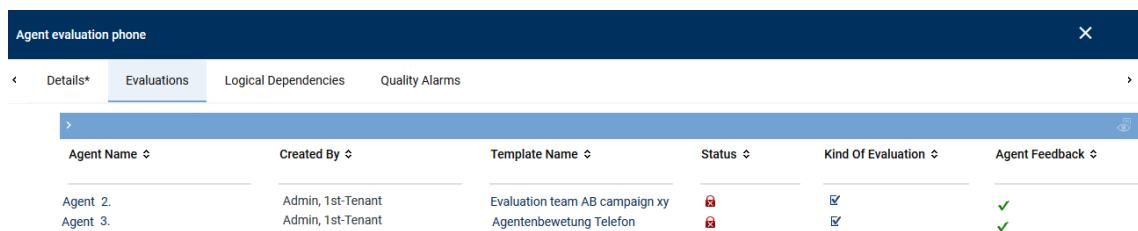
Here, all finished evaluations based on the selected template are displayed.



Created By ↕	Result ↕
Default, Default	80.0
Default, Default	88.33

Fig. 10: Evaluations (reduced view)

1. To expand the display, click on the icon  (*Expand/Collapse*).










Agent Name ↕	Created By ↕	Template Name ↕	Status ↕	Kind Of Evaluation ↕	Agent Feedback ↕
Agent 2.	Admin, 1st-Tenant	Evaluation team AB campaign xy		<input checked="" type="checkbox"/>	
Agent 3.	Admin, 1st-Tenant	Agentenbewertung Telefon		<input checked="" type="checkbox"/>	

Fig. 11: Evaluations (expanded view)


2. To collapse the display, click on the icon  (*Expand/Collapse*).

Agent Name	Name of the evaluated agent
Created By	Name of the user who has made the evaluation.
Template Name	Name of the template
Status	Shows whether the evaluation has already been released or still is a draft.  = Evaluation has been released.  = Evaluation is a draft.
Kind of Evaluation	Shows the kind of evaluation.  = first evaluation

	<input checked="" type="checkbox"/> + = re-evaluation <input checked="" type="checkbox"/> ✓ = reference evaluation <input checked="" type="checkbox"/> ✚ = calibration evaluation
Agent Feedback	Shows whether the agent has already given a feedback to the evaluation. <input checked="" type="checkbox"/> = no agent feedback available <input checked="" type="checkbox"/> ! = Agent feedback available. Agent does not agree with the evaluation. <input checked="" type="checkbox"/> ✓ = Agent feedback available. Agent agrees with the evaluation.
Conversation Type	Shows the conversation type of the evaluation.
Contains Note	Shows whether the evaluation contains a note.
Call ID	Shows the call ID which serves to map the evaluation to the call.
Result	Shows the result (achieved score) of the evaluation.

5.3.2.1

Show evaluations

1. Select the tab *Evaluations*, see [chapter "Tab Evaluations"](#), p. 17.
2. Select the evaluation you would like to view in the list of the available evaluations.
3. Click on the icon  (*View*).
 ⇒ The menu items which are available for the evaluations are displayed:

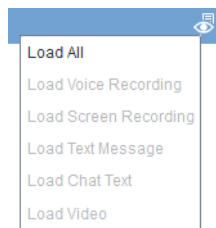


Fig. 12: Menu items View

4. Select the respective menu item.
 ⇒ The corresponding action is carried out and the evaluation is displayed.

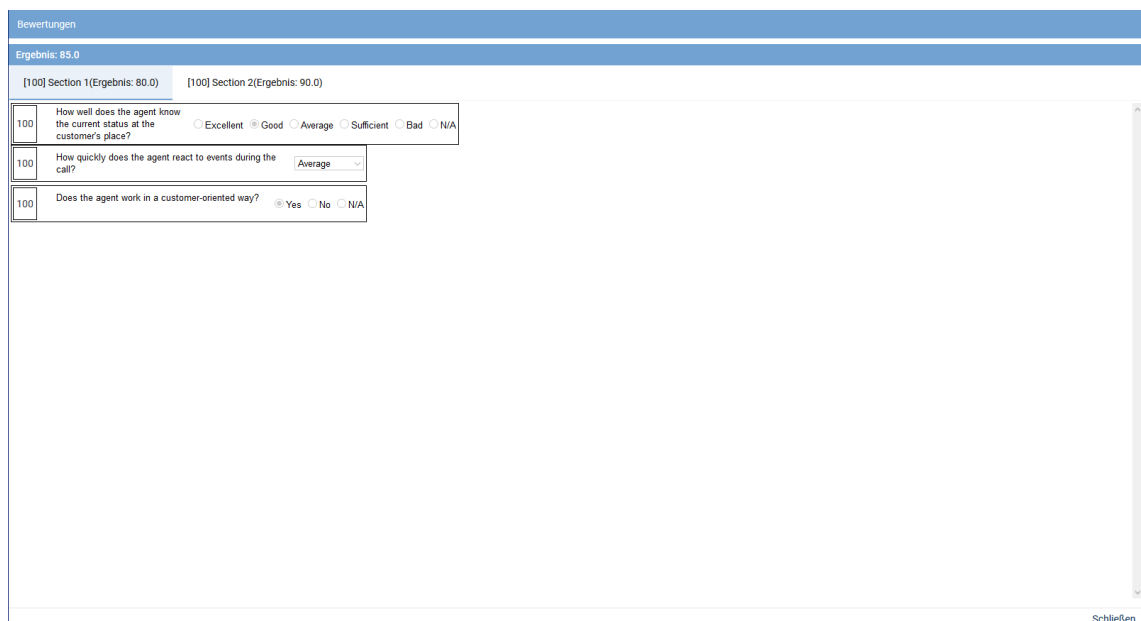


Fig. 13: Evaluation (example)

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

5.3.3 Tab Logical Dependencies

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

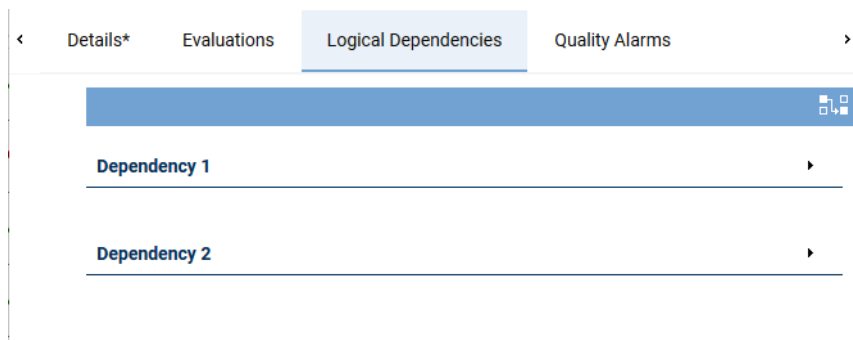



Fig. 14: Logical Dependencies

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

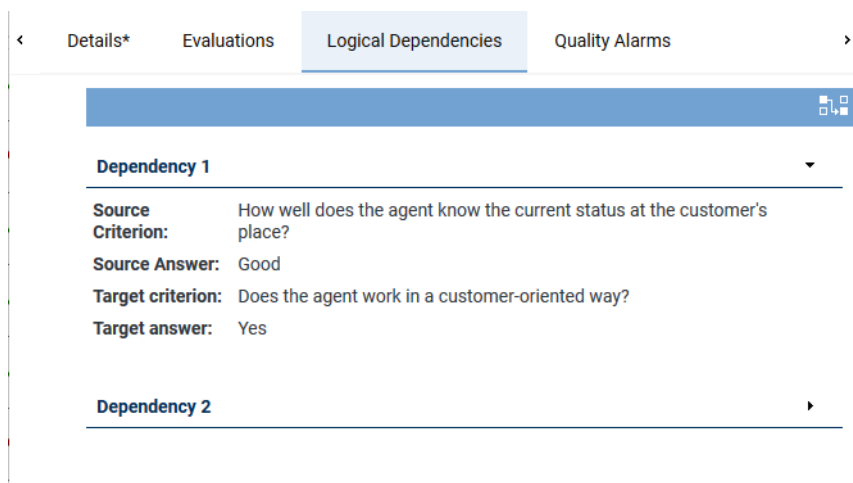




Fig. 15: Logical dependencies, information

2. To hide information of a logical dependency, click on the icon  next to the name of the logical dependency.
3. To define new dependencies or edit existing ones (see [chapter "Edit or create logical dependencies", p. 29](#)), click on the icon  (*Edit*).

5.3.4 Tab Quality Alarms

Here, you can display and edit threshold values (quality alarms) for evaluations.

If a score is below the defined threshold value, then you can inform previously selected groups of persons automatically with this function.

<	Details*	Evaluations	Logical Dependencies	Quality Alarms	>
<div> <div><</div> <div>+</div> <div></div> <div>×</div> </div>					
Name ↕		Created By ↕			
Internal QA		Admin, 1st-Tenant			

Fig. 16: Quality alarms (reduced view)

	Create	Creates a new quality alarm, see chapter "Edit or create specific quality alarm", p. 33.
	Edit specific quality alarm	Opens the selected quality alarm for editing, see chapter "Edit or create specific quality alarm", p. 33.
	Delete	Deletes the selected quality alarm, see chapter "Delete specific quality alarm", p. 42.

- To expand the display, click on the icon (*Expand/Collapse*).

>	<div> <div>+</div> <div></div> <div>×</div> </div>					
Type ↕	Name ↕	Created By ↕	Creation Date ↕	Activated ↕	Global ↕	Minimum Numb
	Internal QA	Admin, 1st-Tenant		×	×	

Fig. 17: Quality alarms (expanded view)

- To collapse the display, click on the icon (*Expand/Collapse*).

Type	Type of the quality alarm = global quality alarm for evaluation template = specific quality alarm for evaluation template
Name	Name of the template
Created By	Name of the user who has created the quality alarm.
Creation Date	Date on which the quality alarm was created.
Activated	Shows whether the quality alarm has been activated. = Quality alarm has been activated. = Quality alarm has been deactivated.
Global	Shows whether a global quality alarm has been released for all or only for selected evaluation templates. = Global quality alarm has been released for all evaluation templates. = Global quality alarm has been released for selected evaluation templates only.
Minimum number of evaluations	Shows how many evaluations have to be made at least before the quality alarm is analyzed.
Per Agent	Shows whether the quality alarm is supposed to be applied to individual agents. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to individual agents. <input type="checkbox"/> = Apply to all selected agents.

<i>All Agents</i>	Shows whether the quality alarm is valid for all agents. ✓ = valid for all agents ✗ = not valid for all agents
<i>Monitored Score</i>	Shows the monitored score.
<i>Rating Scheme</i>	Shows the selected rating scheme.
<i>Updated</i>	Shows the point in time when the quality alarm was updated for the last time.

5.3.5

Tab Activate

Here, you can configure and activate a previously saved customer survey template.



This tab is only available for customer survey templates.

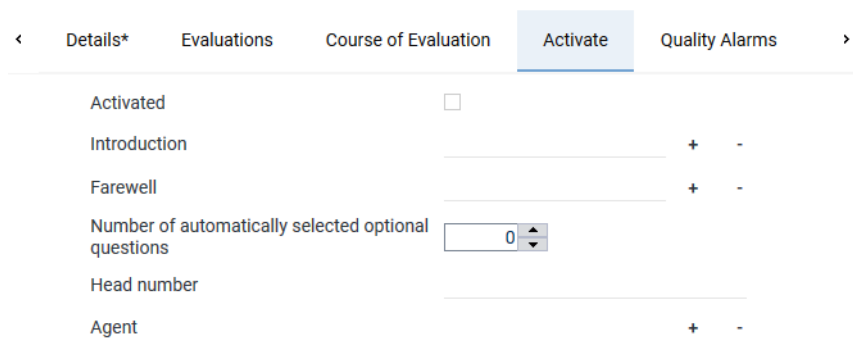







Fig. 18: Activate

<i>Activated</i>	Shows whether the customer survey template has been activated. Select whether the customer survey template is supposed to be activated. ☑ = Customer survey has been activated. ☐ = Customer survey has not been activated.
<i>Introduction</i>	Shows the audio file which contains the welcome message for the caller. To select a file, click on the button  . See chapter "Upload and add new audio file", p. 22. To delete the selection, click on the button  .
<i>Farewell</i>	Shows the audio file which contains the farewell message for the caller. To select a file, click on the button  . See chapter "Upload and add new audio file", p. 22. To delete the selection, click on the button  .
<i>Number of automatically selected optional questions</i>	Shows the number of automatically selected optional questions. If optional questions have been created in the template generator for the customer survey, the number of the optional questions set here is selected automatically.
<i>Head number</i>	Phone number which is supposed to be used for the customer survey. For every phone call made to this number, the customer survey is started. Make sure that the phone number entered here is known in the PBX and has already been prepared by the system administrator for the option <i>Customer survey</i> .
<i>Agent</i>	Shows the agent who is evaluated.

To select an agent, click on the button . See [chapter "Add agent", p. 24.](#)

To delete the selection, click on the button .

5.3.5.1 Upload and add new audio file



1. Click on the icon  on the right of the entry field.

Fig. 19: Add audio file

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

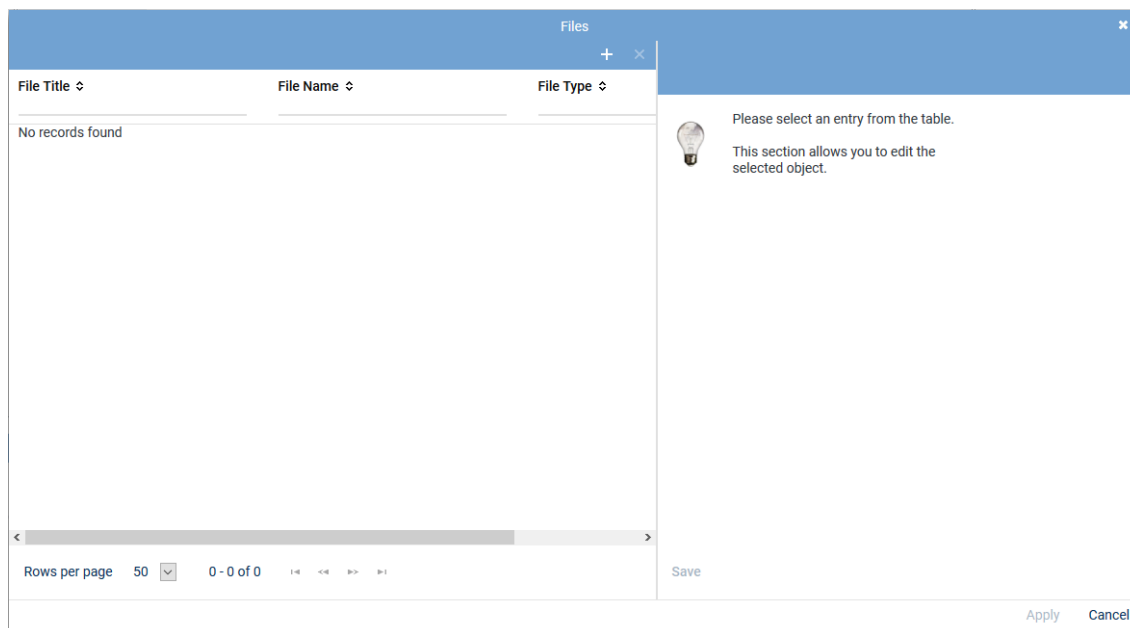


Fig. 20: Add file

3. Click on the button *Upload File*.

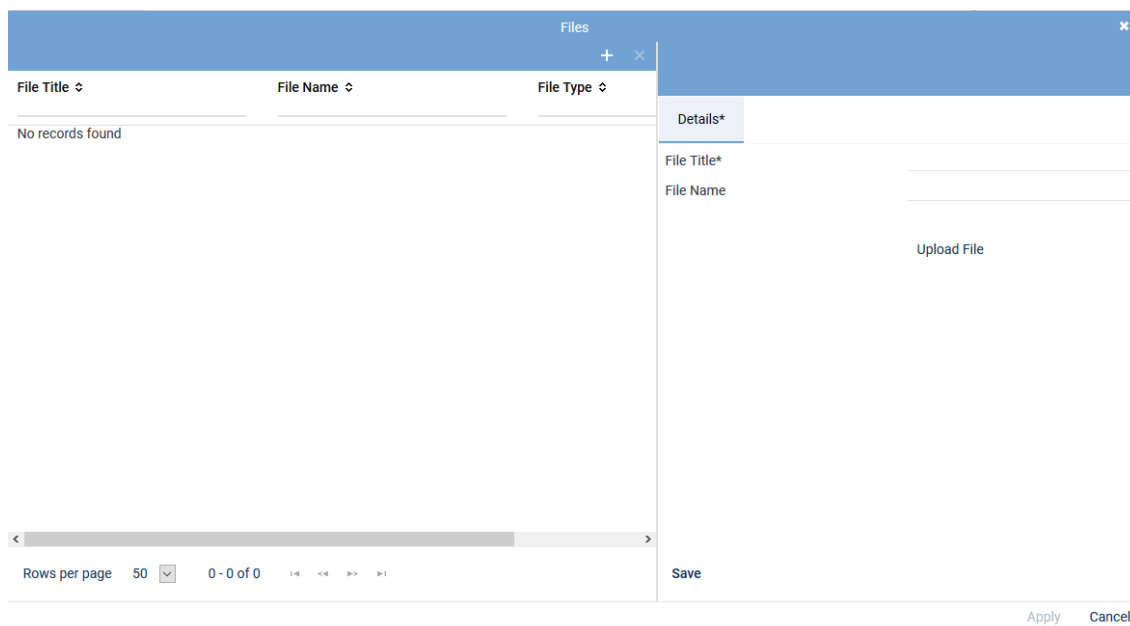


Fig. 21: Upload File

4. Click on the button *Choose File*.

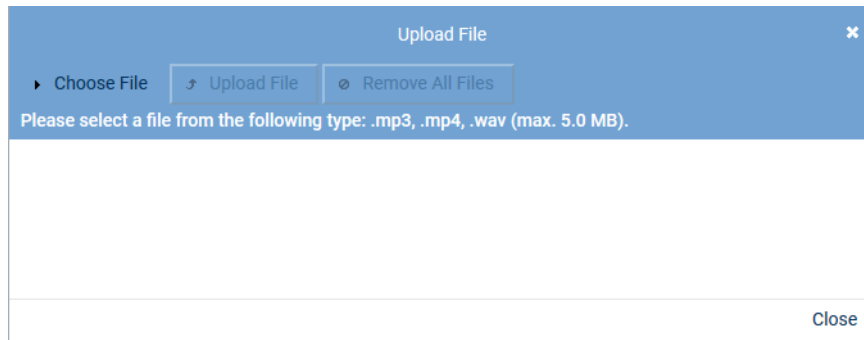


Fig. 22: Choose file

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

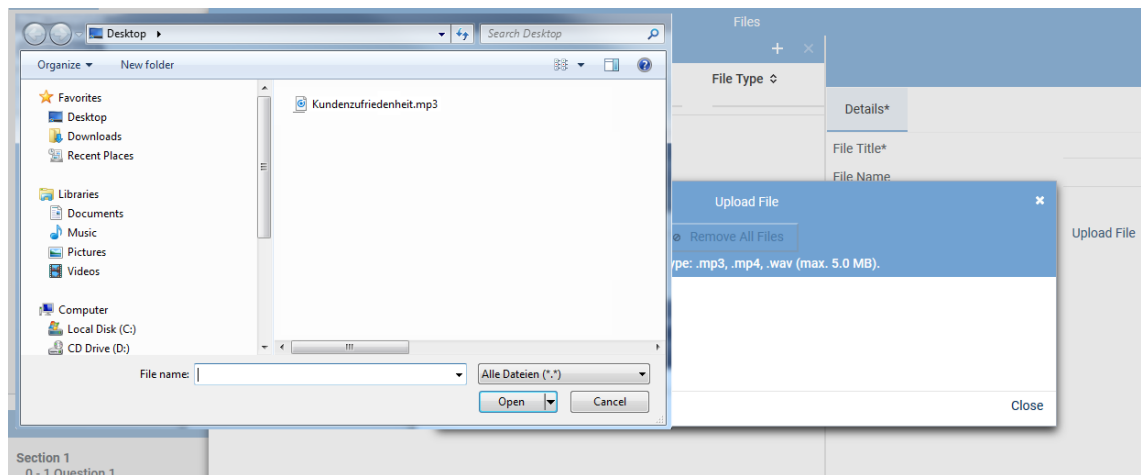



Fig. 23: Open file

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

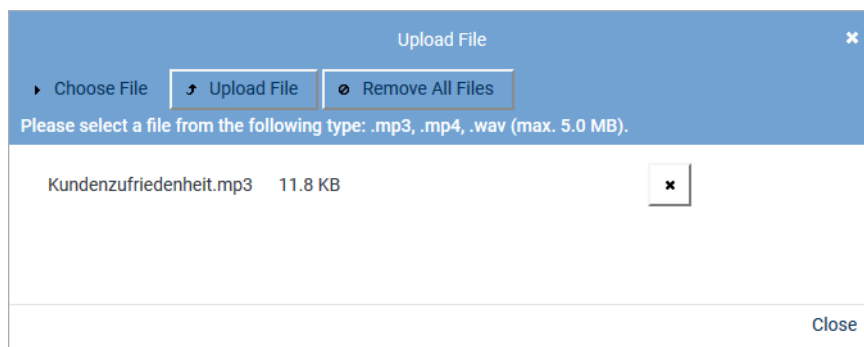


Fig. 24: Upload File

7. If required, you can change the preset file title for the audio file in the entry field *File Title*.
8. To save the uploaded file in the file list, click on the button *Save*.

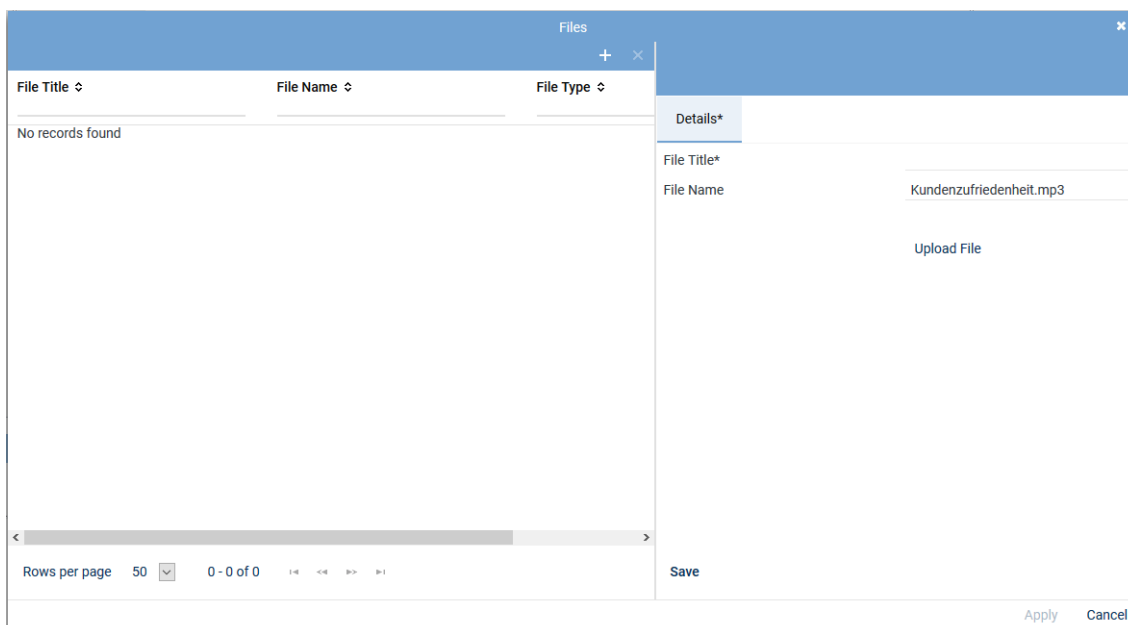


Fig. 25: Save file in file list

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

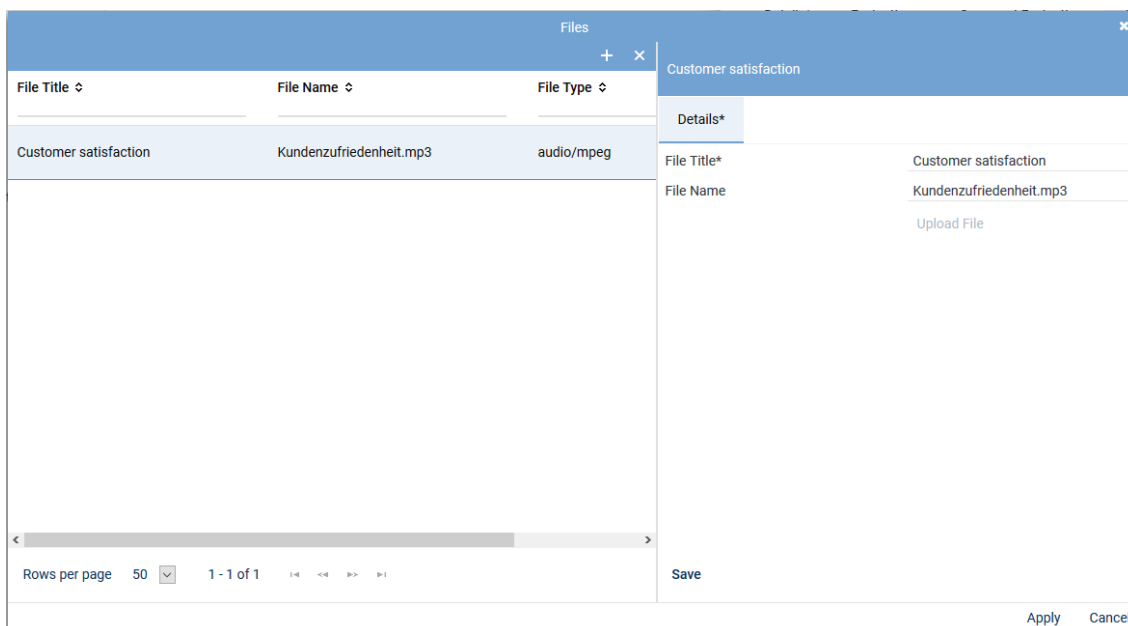


Fig. 26: Apply file to the element

5.3.5.2 Add agent



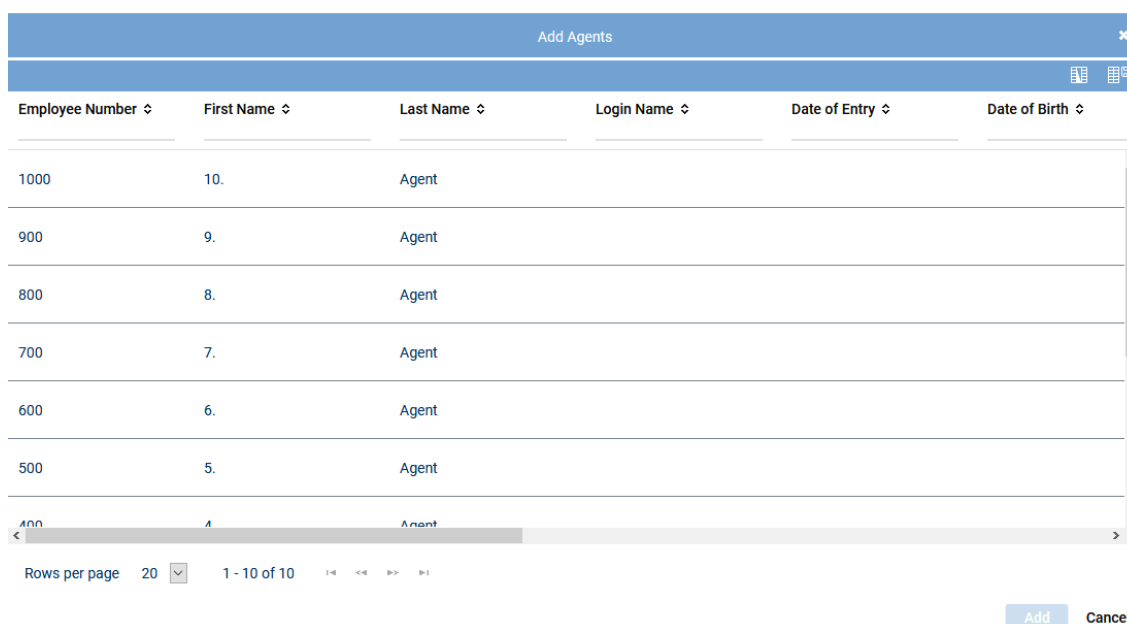
You can assign a maximum of 1 agent to the customer survey template.

- Click on the button **+** on the right of the entry field.

_____ + -

Fig. 27: Add agent

- Select an agent from the list.



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			

Rows per page: 20 1 - 10 of 10

Add Cancel

Fig. 28: Add agent

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

5.4 Create template

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

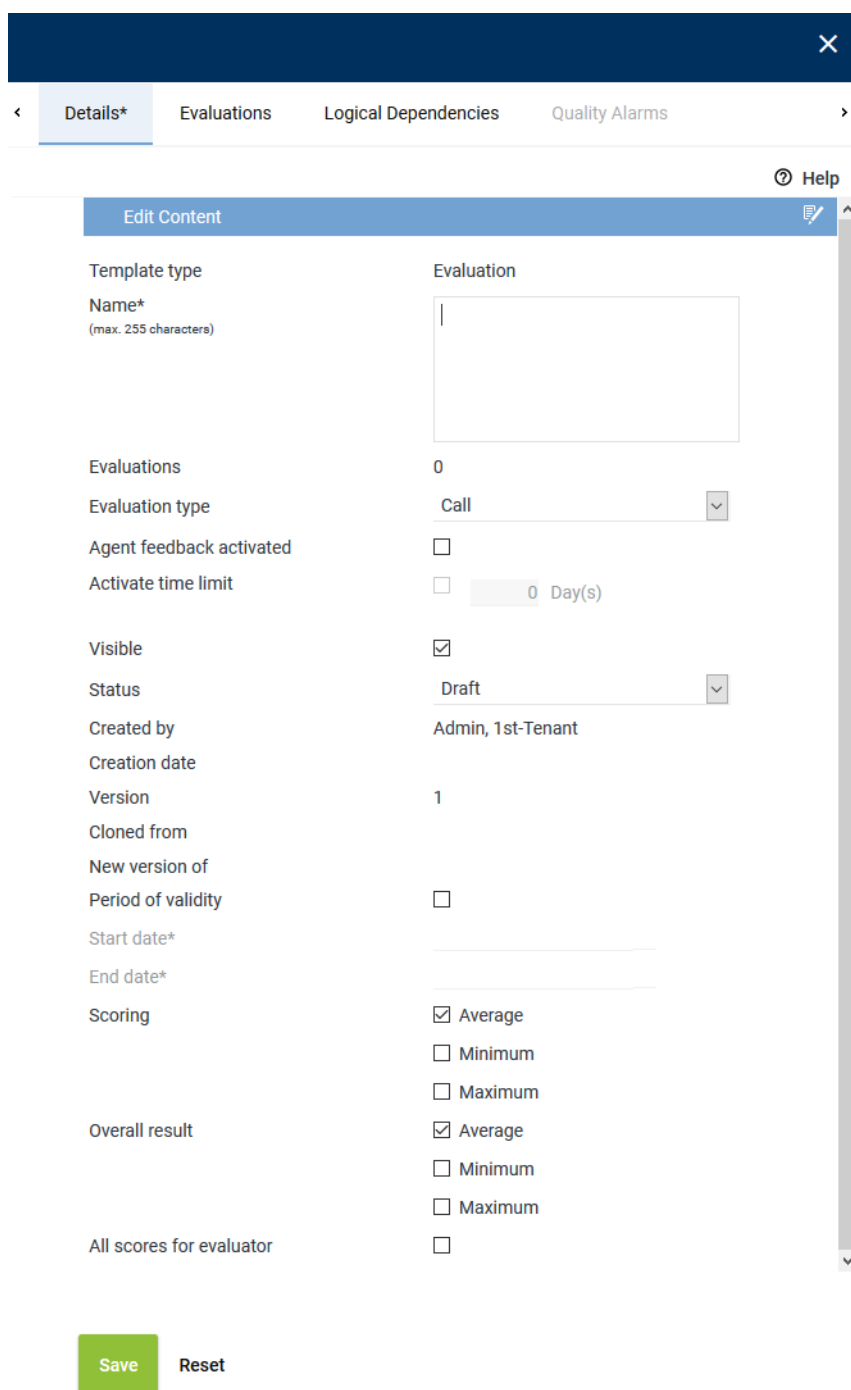
<i>Create New</i>	<p>A completely new template is created.</p> <p>Select whether you would like to create an evaluation template, a customer survey template or a Call Director customer survey template.</p>
<i>Create New Version</i>	<p>The selected template is the copy template for a new version. A new version is created automatically. The version number is increased automatically.</p> <p>This option is only visible if templates already exist.</p>
<i>Create Clone</i>	<p>The selected template is the copy template for the new version of the template. A new template with the version number "1" is created.</p> <p>This option is only visible if templates already exist.</p>

- 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:




Template type	Evaluation
Name* (max. 255 characters)	<input type="text"/>
Evaluations	0
Evaluation type	Call <input type="button" value="v"/>
Agent feedback activated	<input type="checkbox"/>
Activate time limit	<input type="checkbox"/> 0 Day(s)
Visible	<input checked="" type="checkbox"/>
Status	Draft <input type="button" value="v"/>
Created by	Admin, 1st-Tenant
Creation date	
Version	1
Cloned from	
New version of	
Period of validity	<input type="checkbox"/>
Start date*	<input type="text"/>
End date*	<input type="text"/>
Scoring	<input checked="" type="checkbox"/> Average <input type="checkbox"/> Minimum <input type="checkbox"/> Maximum
Overall result	<input checked="" type="checkbox"/> Average <input type="checkbox"/> Minimum <input type="checkbox"/> Maximum
All scores for evaluator	<input type="checkbox"/>

Save Reset

Fig. 29: Create template - detail view (example)

7. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 15.
 - *Evaluations*, see [chapter "Tab Evaluations"](#), p. 17.
 - *Logical Dependencies*, see [chapter "Tab Logical Dependencies"](#), p. 19.
 - *Enable* (only active for customer survey templates), see [chapter "Tab Activate"](#), p. 21.
 - *Quality Alarms*, see [chapter "Tab Quality Alarms"](#), p. 19.
8. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

5.5 Edit template

1. Select a template in the main view.
2. To open the selected template and edit it, click on the icon  (*Edit*) in the detail view.



You only can edit a template as long as it has the status *Draft*. You can only edit the template if no other user is currently editing it. If the template is currently edited by another user, a message is displayed informing you that the template has been locked and thus cannot be edited.

3. Set up the template according to your requirements.



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

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

×

<
Details*
Evaluations
Logical Dependencies
Quality Alarms
>

Help

Edit Content

<p>Template type</p> <p>Name* <small>(max. 255 characters)</small></p> <p>Evaluations</p> <p>Evaluation type</p> <p>Agent feedback activated</p> <p>Activate time limit</p> <p>Visible</p> <p>Status</p> <p>Created by</p> <p>Creation date</p> <p>Version</p> <p>Cloned from</p> <p>New version of</p> <p>Period of validity</p> <p>Start date*</p> <p>End date*</p> <p>Scoring</p> <p>Overall result</p> <p>All scores for evaluator</p>	<p>Evaluation</p> <div style="border: 1px solid #ccc; height: 60px; margin-bottom: 10px;"></div> <p>0</p> <p>Call ▼</p> <p><input type="checkbox"/></p> <p><input type="checkbox"/> 0 Day(s)</p> <p><input checked="" type="checkbox"/></p> <p>Draft ▼</p> <p>Admin, 1st-Tenant</p> <p>1</p> <p><input type="checkbox"/></p> <p><input checked="" type="checkbox"/> Average</p> <p><input type="checkbox"/> Minimum</p> <p><input type="checkbox"/> Maximum</p> <p><input checked="" type="checkbox"/> Average</p> <p><input type="checkbox"/> Minimum</p> <p><input type="checkbox"/> Maximum</p> <p><input type="checkbox"/></p>
--	--

Save

Reset

Fig. 30: Create template - detail view (example)

6. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 15.
 - *Evaluations*, see [chapter "Tab Evaluations"](#), p. 17.
 - *Logical Dependencies*, see [chapter "Tab Logical Dependencies"](#), p. 19.
 - *Enable* (only active for customer survey templates), see [chapter "Tab Activate"](#), p. 21.
 - *Quality Alarms*, see [chapter "Tab Quality Alarms"](#), p. 19.
7. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
 To discard the entries and close the window, click on the button **Cancel**.

5.5.1 Edit or create logical dependencies



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




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



Logical dependencies cannot be defined across sections.



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

1. Select the tab *Logical Dependencies*, see [chapter "Tab Logical Dependencies", p. 19](#).
2. To define new dependencies or edit existing ones, click on the icon  (*Edit logical dependencies*).
3. In the working area, click on the element the answer of which is supposed to serve as basic criterion.

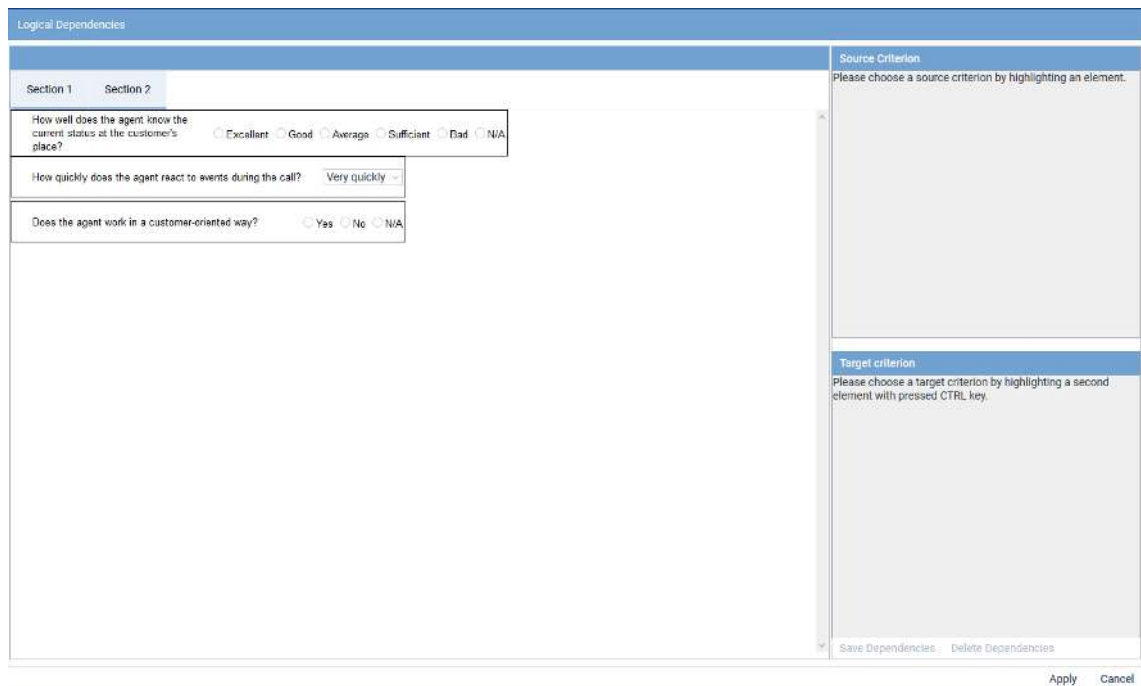


Fig. 31: Define logical dependencies

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

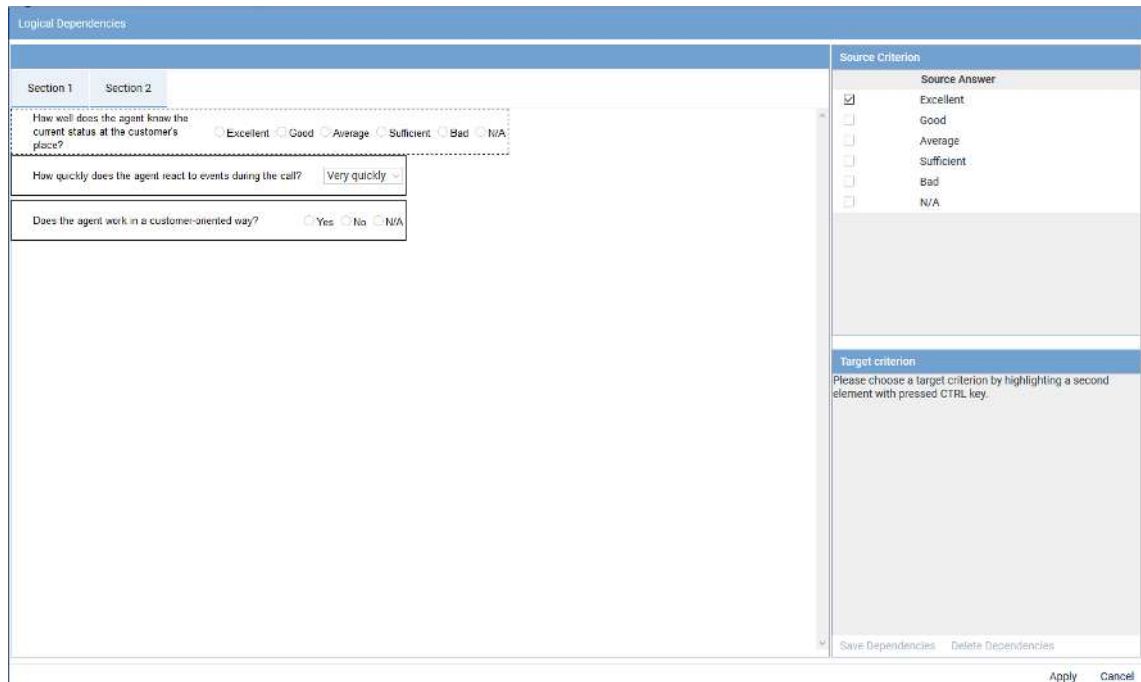


Fig. 32: Logical dependencies - define source criterion

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

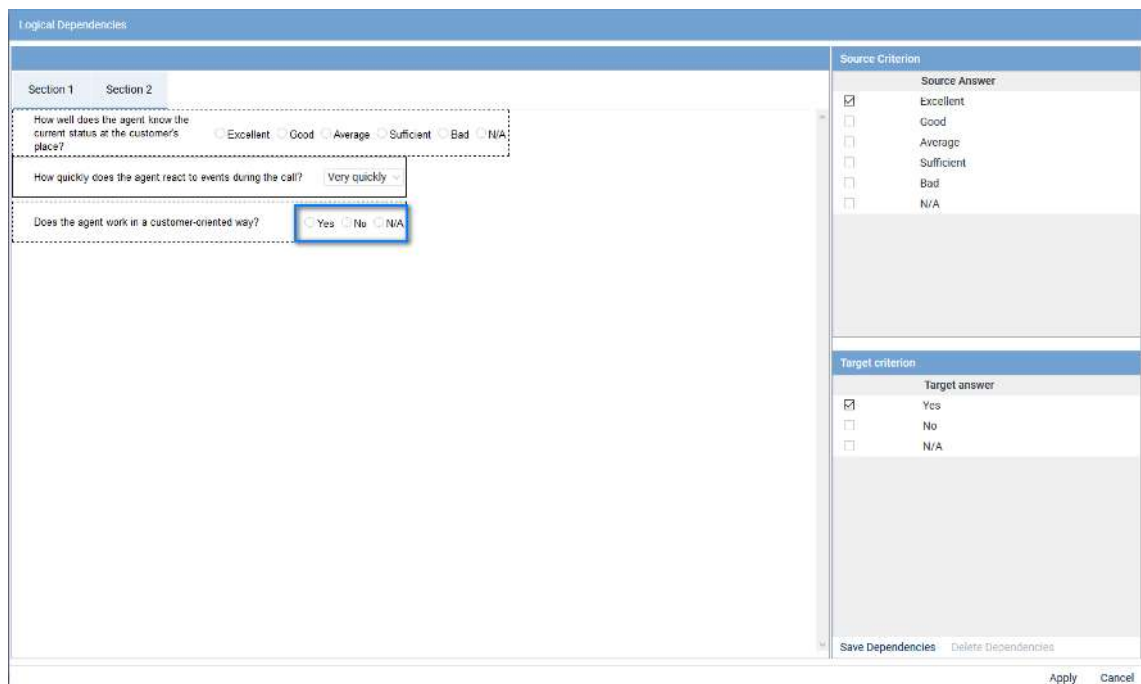


Fig. 33: Logical dependencies - define target criterion

- Select the value for the target answer in the window *Target Criterion*.
- To save the defined dependency, click on the button *Save Dependencies*.
- If required, repeat these steps for additional dependencies in the same or in different sections.
To change the section, click on the name of the section above the template area.
- To apply all defined dependencies for the template, click on the button *Apply*.
To close the window without applying the defined dependencies, click on the button *Cancel*.

- ⇒ In the displayed example, question 2 would be automatically set to “Yes”, if question 1 was answered with “Excellent”.

5.5.1.1 Change logical dependency

For saved dependencies you can change the values for source and target answer.

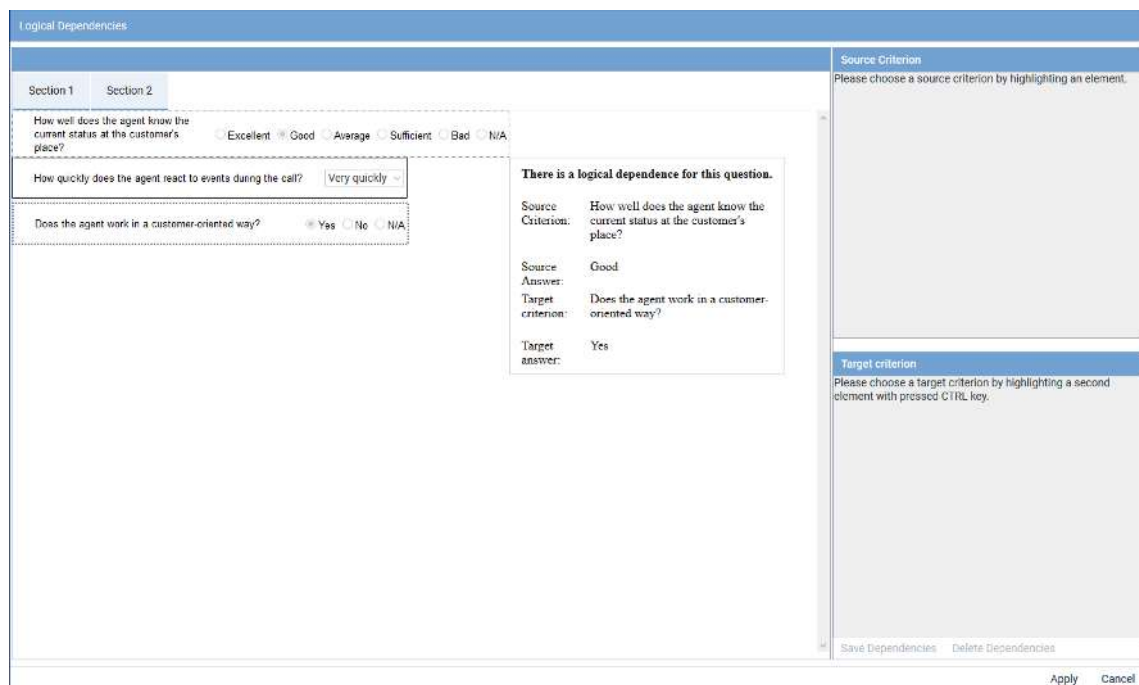


For saved dependencies you cannot change the assignment of the elements. To remove the dependency between 2 elements, you have to delete the defined dependency, see [chapter "Delete logical dependencies", p. 32](#).



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

1. Point the cursor to an element which has been connected to the dependency you would like to change. You can select the source criterion or the target criterion.
 - ⇒ Information about the dependency is displayed.



The screenshot shows the 'Logical Dependencies' window. On the left, there are two sections: 'Section 1' and 'Section 2'. Section 1 contains a question: 'How well does the agent know the current status at the customer's place?' with radio button options: Excellent, Good, Average, Sufficient, Bad, N/A. Section 2 contains a question: 'How quickly does the agent react to events during the call?' with a dropdown menu showing 'Very quickly'. Below these, there is a question: 'Does the agent work in a customer-oriented way?' with radio button options: Yes, No, N/A. On the right, a box titled 'There is a logical dependence for this question.' displays the dependency details: Source Criterion: 'How well does the agent know the current status at the customer's place?', Source Answer: 'Good', Target criterion: 'Does the agent work in a customer-oriented way?', Target answer: 'Yes'. To the right of this box are two panels: 'Source Criterion' and 'Target criterion', both with instructions to choose a criterion by highlighting an element. At the bottom right, there are buttons for 'Save Dependencies', 'Delete Dependencies', 'Apply', and 'Cancel'.

Fig. 34: Show logical dependency

2. Click on the selected element.
 - ⇒ The criteria of the dependency are edited.

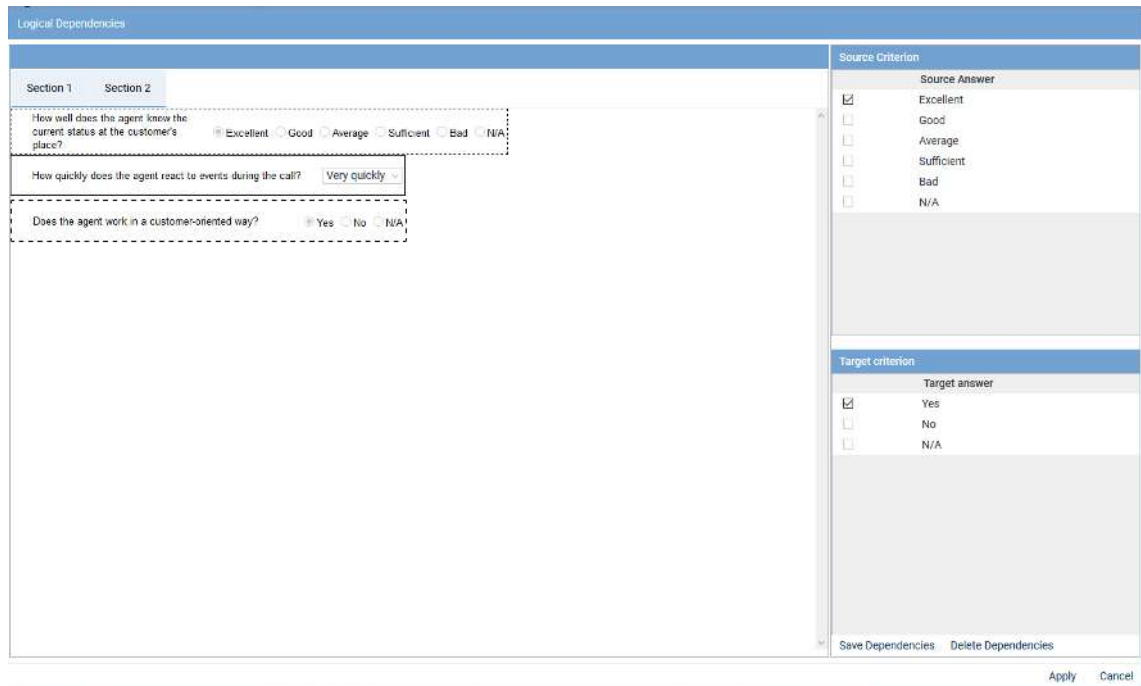


Fig. 35: Change logical dependency

3. First delete the set value by clicking on the check box with the check mark.
 - ⇒ The selection is deleted.
4. Select the value you would like to use instead.
 - ⇒ The check mark is set in the corresponding check box.
5. If required, you can correct the second value the same way.
6. To save the defined dependency, click on the button *Save Dependencies*.
7. To apply the defined dependency for the template, click on the button *Apply*.
To discard the change and close the window, click on the button *Cancel*.

5.5.1.2 Delete logical dependencies

1. Point the cursor to an element which has been connected to the dependency you would like to delete.
 - ⇒ Information about the dependency is displayed.

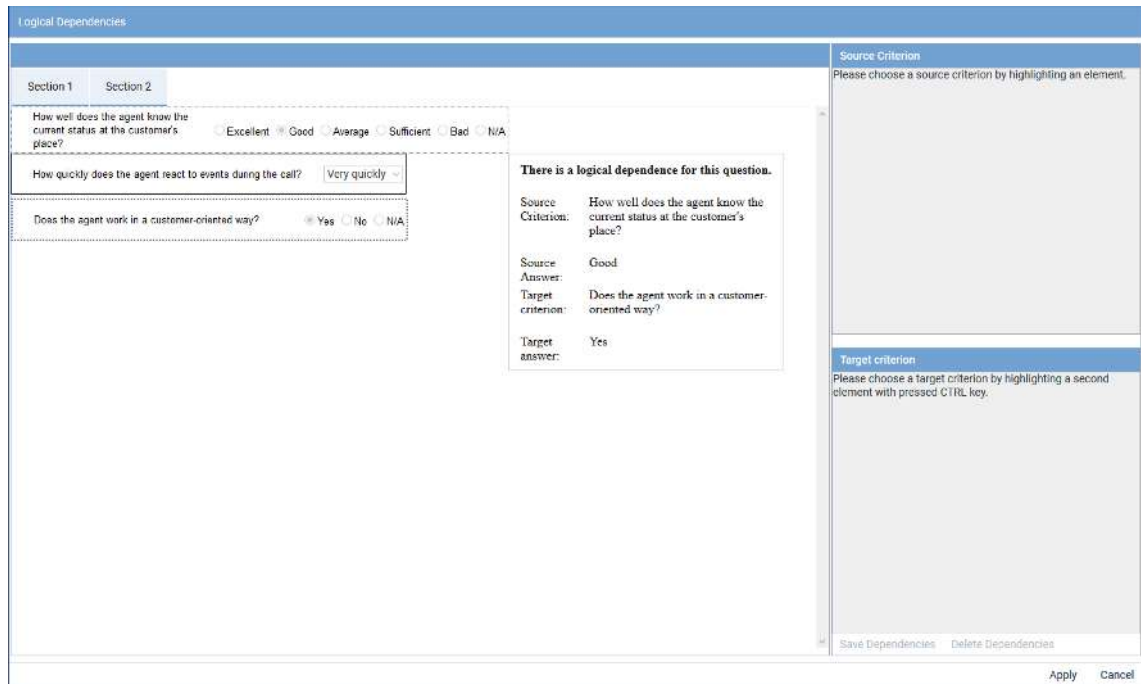


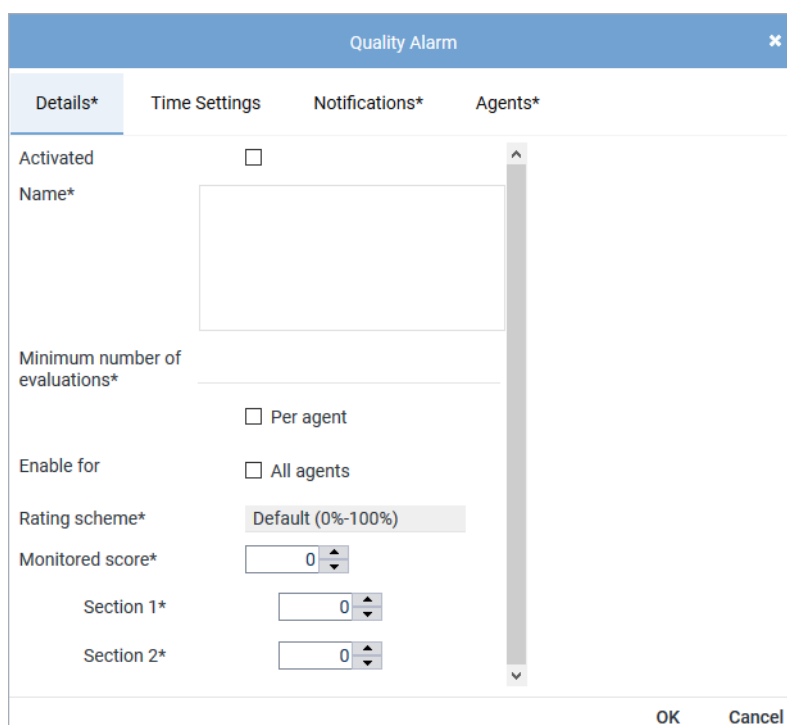


Fig. 36: Show logical dependency

2. Click on the selected element.
⇒ The criteria of the dependency are edited.
3. Click on the button *Delete Dependencies*
⇒ The defined dependency is deleted.
4. To apply the changes for the template, click on the button *Apply*.
To discard the change and close the window, click on the button *Cancel*.

5.5.2 Edit or create specific quality alarm

1. Select the tab *Quality Alarms*, see [chapter "Tab Quality Alarms", p. 19](#).
2. To define a new specific quality alarm, click on the icon  (*Create*).
To edit an existing specific quality alarm, select the specific quality alarm in the list and click on  (*Edit specific quality alarm*).
⇒ The following window appears:



The image shows a 'Quality Alarm' configuration window with a blue header bar containing the title and a close button. Below the header are four tabs: 'Details*', 'Time Settings', 'Notifications*', and 'Agents*'. The 'Details*' tab is selected. The form contains the following fields and controls:

- Activated:** A checkbox that is currently unchecked.
- Name*:** A large text input field.
- Minimum number of evaluations*:** A text input field.
- Enable for:** Two checkboxes, 'Per agent' and 'All agents', both of which are unchecked.
- Rating scheme*:** A dropdown menu showing 'Default (0%-100%)'.
- Monitored score*:** A numeric input field with a value of '0' and up/down arrows.
- Section 1*:** A numeric input field with a value of '0' and up/down arrows.
- Section 2*:** A numeric input field with a value of '0' and up/down arrows.

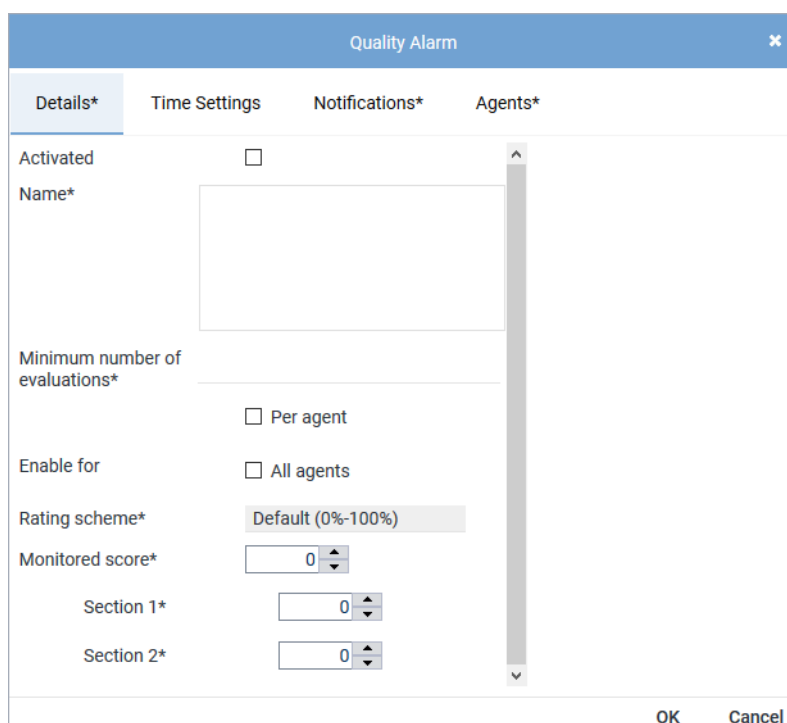
At the bottom right of the window are 'OK' and 'Cancel' buttons.

Fig. 37: Create or edit specific quality alarm

3. Adjust all necessary settings within the 4 tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 34
 - *Time Settings*, see [chapter "Tab Time Settings"](#), p. 36
 - *Notifications*, see [chapter "Tab Notifications"](#), p. 36
 - *Agents*, see [chapter "Tab Agents"](#), p. 40.
4. To save the settings, click on the button *OK*.
To discard the settings or the changes and close the window, click on the button *Cancel*.

5.5.2.1 Tab Details

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



The image shows a 'Quality Alarm' dialog box with a blue header and a close button. It has four tabs: 'Details*', 'Time Settings', 'Notifications*', and 'Agents*'. The 'Details*' tab is active. It contains the following fields:

- Activated**: A checkbox that is currently unchecked.
- Name***: A large text input field.
- Minimum number of evaluations***: A text input field.
- Enable for**: Two checkboxes, 'Per agent' and 'All agents', both of which are unchecked.
- Rating scheme***: A dropdown menu showing 'Default (0%-100%)'.
- Monitored score***: A numeric input field with a value of '0'.
- Section 1***: A numeric input field with a value of '0'.
- Section 2***: A numeric input field with a value of '0'.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

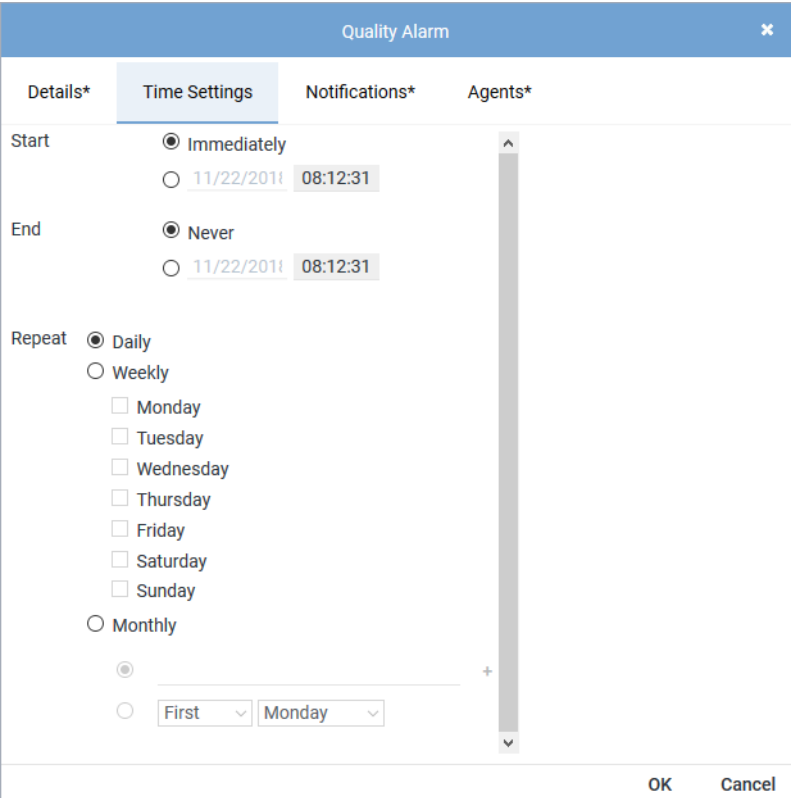
Fig. 38: Specific quality alarm - define details

Activated	Shows whether the quality alarm has been activated. Select whether the quality alarm is supposed to be activated. <input checked="" type="checkbox"/> = Quality alarm has been activated. <input type="checkbox"/> = Quality alarm has been deactivated.
Name	Name of the quality alarm. Enter the name of the quality alarm here.
Minimum number of evaluations	Shows how many evaluations have to be made at least before the quality alarm is analyzed. Enter the number of the necessary evaluations.
Per Agent	Shows whether the quality alarm is supposed to be applied to individual agents. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to individual agents. <input type="checkbox"/> = Apply to all selected agents.
All Agents	Here, you can define whether the quality alarm is supposed to be applied to all agents known to the system. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to all agents. <input type="checkbox"/> = Apply only to the assigned agents. (Assign agents see chapter "Tab Agents", p. 40)
Rating Scheme	Shows which rating scheme is used. (The displayed value cannot be changed.)
Monitored Score	Shows the total score which is monitored as threshold value. Enter a score for the threshold value.
Section 1	If sections have been created in the template, then the sections' score is displayed here which is monitored as threshold value. Enter a score for the threshold value.

NOTICE! The section's name is exemplary as you will see the exact name of the section as it has been entered for the section when creating the template. If no sections have been created, this option is not available.

5.5.2.2 Tab Time Settings

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



The image shows a 'Quality Alarm' dialog box with four tabs: 'Details*', 'Time Settings' (selected), 'Notifications*', and 'Agents*'. The 'Time Settings' tab contains the following controls:

- Start:** A radio button for 'Immediately' is selected. Below it are two disabled input fields showing '11/22/2011' and '08:12:31'.
- End:** A radio button for 'Never' is selected. Below it are two disabled input fields showing '11/22/2011' and '08:12:31'.
- Repeat:** A radio button for 'Daily' is selected. Below it are checkboxes for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday', all of which are unchecked. Below these is a radio button for 'Monthly'. Under 'Monthly', there is a selected radio button for a specific day (indicated by a dot) and two disabled dropdown menus showing 'First' and 'Monday'.

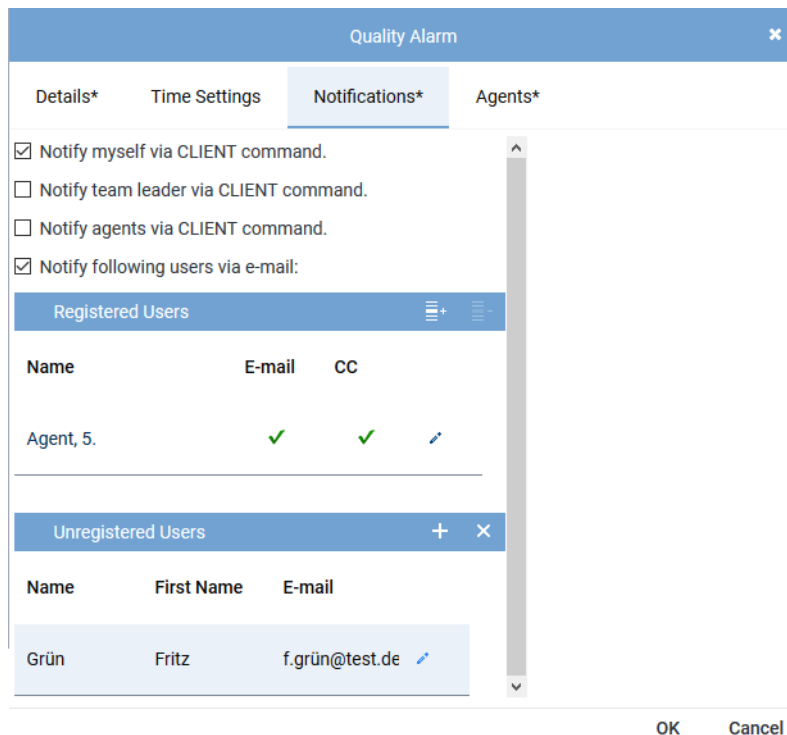
At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Fig. 39: Specific quality alarms - time settings

<i>Start</i>	Shows the time when the check starts. Define the point in time when the regular check is supposed to start.
<i>End</i>	Shows the time when the check ends. Define the point in time when the regular check is supposed to end.
<i>Repeat</i>	Shows the intervals of the check. Select the intervals in which the check is supposed to take place.

5.5.2.3 Tab Notifications

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



The dialog box 'Quality Alarm' has four tabs: Details*, Time Settings, Notifications* (selected), and Agents*. Under the Notifications* tab, there are four checkboxes: 'Notify myself via CLIENT command.' (checked), 'Notify team leader via CLIENT command.' (unchecked), 'Notify agents via CLIENT command.' (unchecked), and 'Notify following users via e-mail:' (checked). Below these are two tables. The 'Registered Users' table has columns 'Name', 'E-mail', and 'CC'. It contains one row for 'Agent, 5.' with green checkmarks in the 'E-mail' and 'CC' columns. The 'Unregistered Users' table has columns 'Name', 'First Name', and 'E-mail'. It contains one row for 'Grün' with 'Fritz' as the first name and 'f.grün@test.de' as the email, with a blue pencil icon in the 'E-mail' column. At the bottom right are 'OK' and 'Cancel' buttons.

Fig. 40: Specific quality alarm - notifications

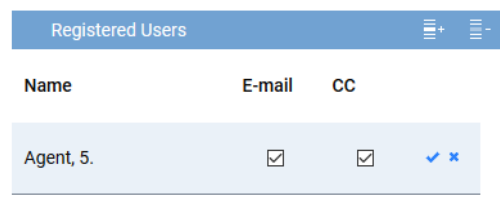
1. To notify the creator, supervisors or agents directly via CLIENT*command*, set a check mark in the respective check box ☒.
2. To notify certain users, set the check mark in the check box *Notify following users via e-mail*.
 - ⇒ Additional fields are displayed which allow assigning users and configuring the notification type. See [chapter "Assign registered users", p. 37](#) and [chapter "Assign unregistered users", p. 39](#).

In the column *E-mail*, the check mark shows whether the user is notified via e-mail or via CLIENT*command*:

 - ✓ = notification option activated
 - ✗ = notification option not activated

5.5.2.3.1 Assign registered users

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




The 'Registered Users' table has columns 'Name', 'E-mail', and 'CC'. It contains one row for 'Agent, 5.' with checkboxes in the 'E-mail' and 'CC' columns, and a blue checkmark and 'x' icon in the 'CC' column.

Fig. 41: Specific quality alarm - registered users (example)

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

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

Fig. 42: Specific quality alarm - select registered users (example)

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



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

Fig. 43: Specific quality alarm - edit registered users (example)

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






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

Fig. 44: Specific quality alarm - configure type of notification (example)

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


5.5.2.3.2 Remove registered users

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

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

Fig. 45: Specific quality alarm - remove registered user (example)

5.5.2.3.3 Assign unregistered users

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

Add Unregistered User


First name*
Last name*
E-mail*

Save Cancel

Fig. 46: Specific quality alarm - add unregistered users

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

5.5.2.3.4 Edit unregistered users

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



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

Fig. 47: Specific quality alarm - unregistered users (example)


2. Make the required changes.

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

Fig. 48: Specific quality alarm - edit unregistered users (example)

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

5.5.2.3.5 Delete unregistered users

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

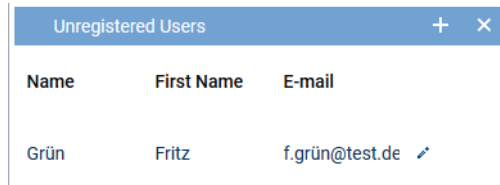


Fig. 49: Specific quality alarm - delete unregistered users (example)

5.5.2.4 Tab Agents

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

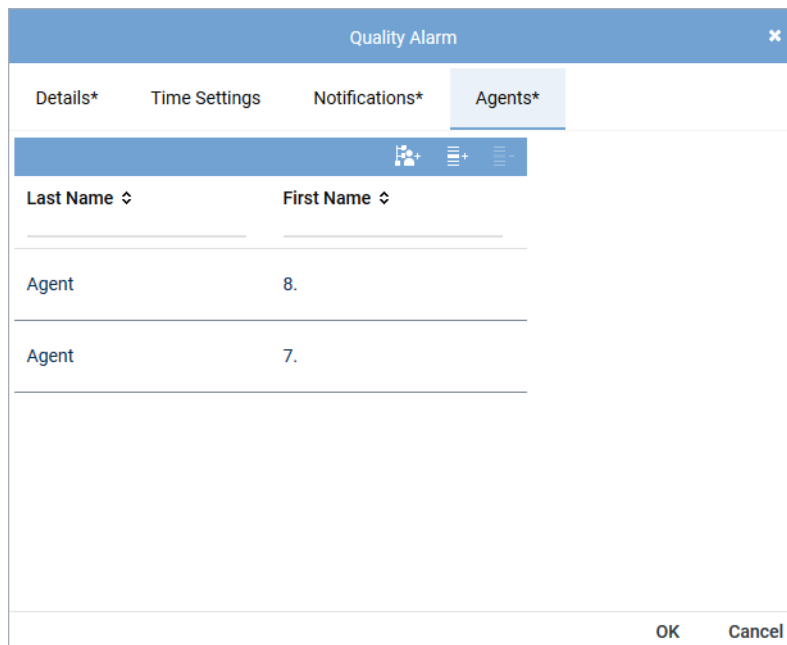







Fig. 50: Specific quality alarm - assign agents

	<i>Add from organization structure</i>	Opens a window in which you can select agents from the organization structure, see chapter "Add agents from organization structure", p. 40.
	<i>Add</i>	Opens a window in which you can add your own agents, see chapter "Add agents", p. 41.
	<i>Remove</i>	Removes the selected agent from the list.

5.5.2.4.1 Add agents from organization structure

1. Select the tab *Agents*, see [chapter "Tab Agents", p. 40.](#)
2. To assign agents from the organization structure, click on the icon  (*Add from organization structure*).



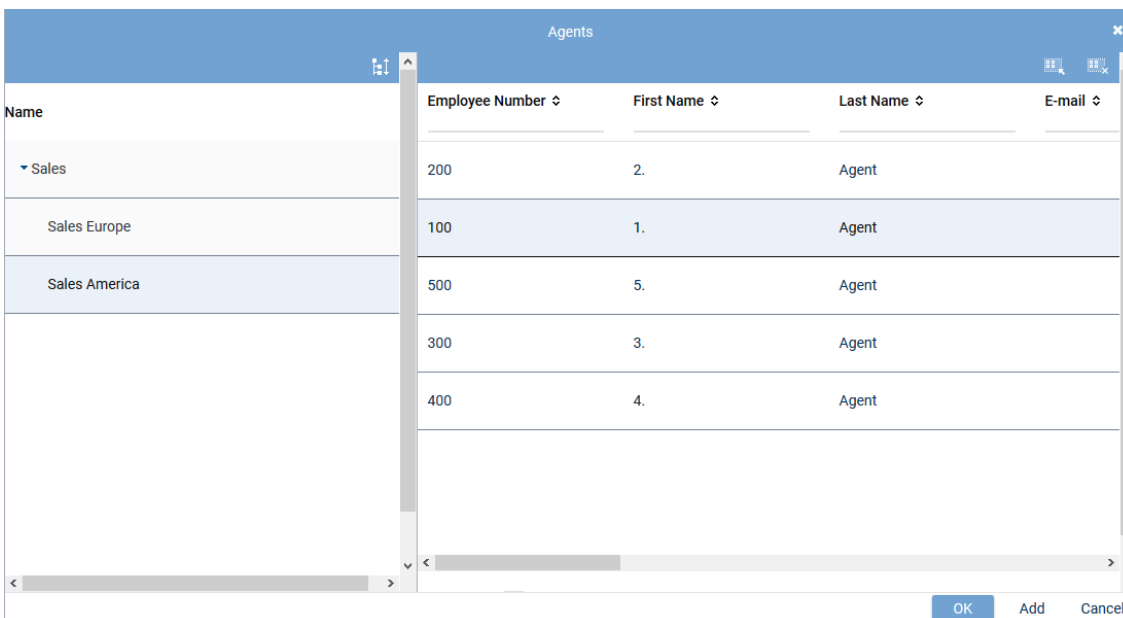
Agents

Last Name ▾ First Name ▾

No records found

Fig. 51: Agents

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





Agents

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	

OK Add Cancel

Fig. 52: Add agents from organization structure


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

5.5.2.4.2 Add agents

- Select the tab *Agents*, see [chapter "Tab Agents", p. 40](#).



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

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



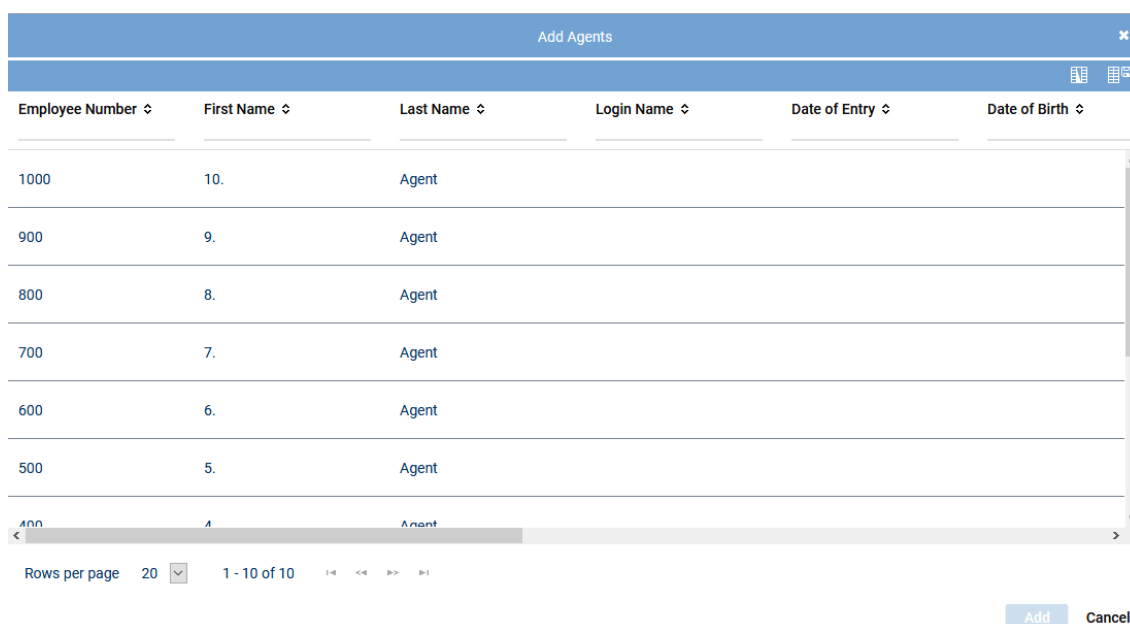
Agents

Last Name ▾ First Name ▾

No records found

Fig. 53: Agents (example)

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




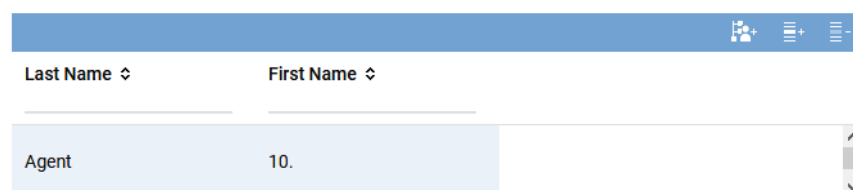
Employee Number	First Name	Last Name	Login Name	Date of Entry	Date of Birth
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			
300	3.	Agent			
200	2.	Agent			
100	1.	Agent			

Fig. 54: Add own agents

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

5.5.2.4.3 Remove agent assignment


- Select the tab *Agents*, see [chapter "Tab Agents", p. 40](#).
- To remove the assignment of an agent, select the respective agent in the list and click on the icon  (*Remove*).

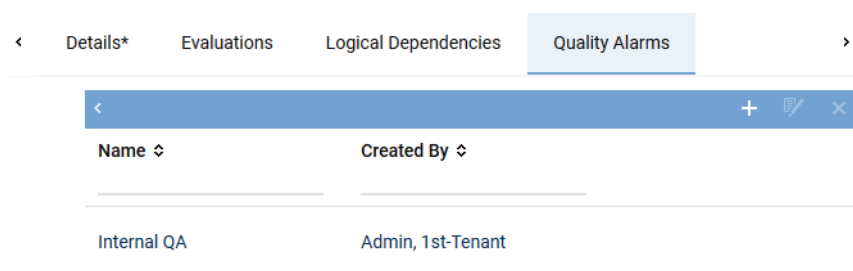


Last Name	First Name
Agent	10.

Fig. 55: Remove agent assignment

5.5.3 Delete specific quality alarm

- Select the tab *Quality Alarms* (see [chapter "Tab Quality Alarms", p. 19](#)).
- To delete a specific quality alarm, select the corresponding entry in the list and click on the icon  (*Delete*).



Name	Created By
Internal QA	Admin, 1st-Tenant

Fig. 56: Delete specific quality alarm

6 Training Package Templates module

6.1 General

In the Training Package Templates module, you can create and administrate training package template.

Training package templates are created by supervisors or quality managers. The training package templates are used in the E-Learning module and in the Sessions module to create training packages. These training packages can be assigned to individual agents or to sessions.

A training package template is a compilation of learning contents in text or pictures which allow agents to improve their skills in a target-oriented way.

In addition, it is possible to categorize training packages in order to describe the topic of the training. That way, it is easy to call up all trainings revolving around the same topic and assign the one which matches the current situation.

Creating a training package template

The template generator allows users to create templates for training packages. Additionally, you can create a new version of a template if later editing becomes necessary or you can use the template as draft for an entirely new template (so-called cloning of a template); the advantage is that certain elements such as the structure or the layout of the draft can be adopted.

A template for a training package can contain the following elements:

- descriptions
- [URLs](#) which link to web-based trainings in the intranet or the Internet
- external audio or video files
- images or photos
- links to files on a server

Training packages are thus a kind of central container for training material which would otherwise be distributed across the entire company and beyond. You can create new and individual training packages depending on the respective need for training of the agents or of agent groups in order to foster them in a target-oriented way.

Creating categories for training package templates

To be able to save trainings in a certain category, you can create categories and administrated them in the Training Package Templates module.



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



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









For information about the configuration of users refer to the administration manual for tenants *User management for tenants*.

As user with the access right for a Templates module you can only access your own templates and the global templates of other users.

6.2 Main view

In the main view, all saved training package templates are displayed.






+ × Training Package Templates General						
Name ↕	Created By ↕	Visible ↕	Version ↕	Status ↕	Cloned From ↕	New Version Of ↕
Produktschulung Teil II	Admin, 1st-Tenant		1		Produktschulung	
Produktschulung	Admin, 1st-Tenant		1			
Trainingspaketvorlage 1	Admin, 1st-Tenant		1			

Rows per page 50 1 - 3 of 3

Fig. 57: Training package templates - main view

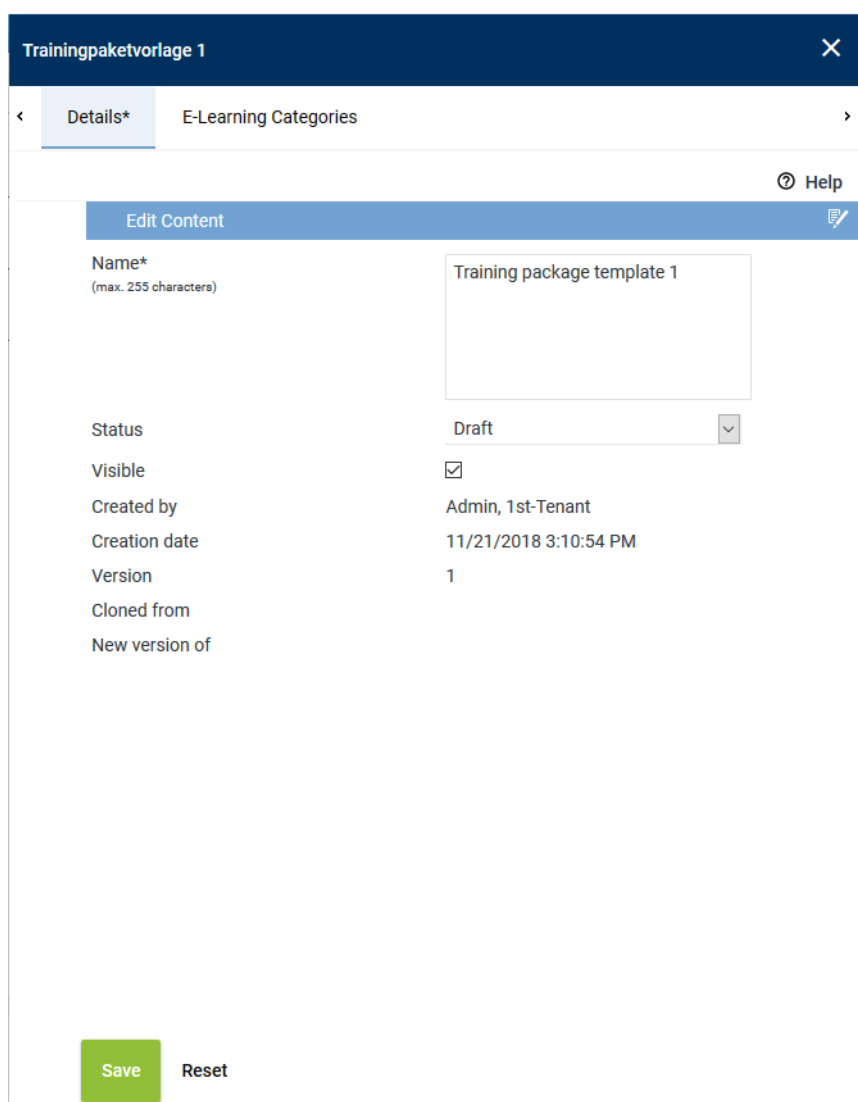
You can see your own training package templates and the globally available templates. To be able to see all templates, the particular access right *Can see all training package templates* is required.

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

Name	Name of the template
Created By	Name of the user who has created the template.
Visible	Shows whether the template is visible for other users.  = Template is visible.  = Template is invisible.
Version	Version number of the template
Status	Shows the editing status of the template.  = Template has been released.  = Template is a draft.  = Template has been deactivated.
Cloned From	Name of the template from which this template has been cloned (<i>Create > Create Clone</i>).
New Version Of	Name of the template which has been the basis for this version (<i>Create > Create New Version</i>).
Creation Date	Shows the date on which the template was created.
Updated	Shows the date on which the template was updated for the last time.

6.3 Detail view

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



The screenshot shows a web interface for editing a training package template. At the top, there's a dark blue header with the title "Trainingpaketvorlage 1" and a close button. Below this is a navigation bar with two tabs: "Details*" (selected) and "E-Learning Categories". A "Help" icon is visible on the right. The main content area has a blue "Edit Content" bar. The form fields are as follows:

Name*	Training package template 1
(max. 255 characters)	
Status	Draft
Visible	<input checked="" type="checkbox"/>
Created by	Admin, 1st-Tenant
Creation date	11/21/2018 3:10:54 PM
Version	1
Cloned from	
New version of	

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

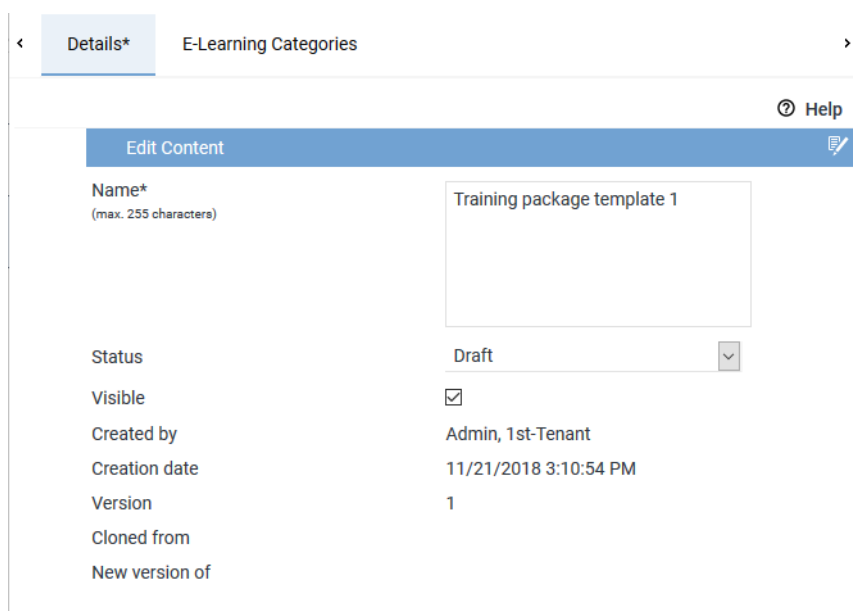
Fig. 58: Training package templates - detail view

The detail view consists of the following tabs:

- *Details*
Here, you can display and edit detailed information about the selected template.
See [chapter "Tab Details", p. 45](#).
- *E-Learning Categories*
Here, you can add or remove categories.
See [chapter "Tab E-Learning Categories", p. 46](#).

6.3.1 Tab Details

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



< Details* E-Learning Categories >

Help

Edit Content

Name*
(max. 255 characters)

Training package template 1

Status

Draft

Visible

☒

Created by

Admin, 1st-Tenant

Creation date

11/21/2018 3:10:54 PM

Version

1

Cloned from

New version of

Fig. 59: Details

Name	<p>Name of the template. Enter the name of the template here.</p> <p>NOTICE! To avoid confusion, a new template cannot be saved under the same name as an already existing one. Enter an unambiguous name for the template.</p>
Status	<p>Shows the editing status of the template.</p> <p>Select the status of the template. Possible options:</p> <ul style="list-style-type: none"> • <i>Draft</i> • <i>Released</i> There can only be 1 released version of a template. • <i>Deactivated</i> (only possible for templates which have already been released) A deactivated template cannot be activated again. To be able to access the contents of a deactivated template, you have to create a new version of the template.
Visible	<p>Shows whether the template is visible for other users.</p> <p>Select whether the template is supposed to be visible.</p> <p><input checked="" type="checkbox"/> = Template is visible.</p> <p><input type="checkbox"/> = Template is invisible.</p>
Created by	Name of the user who has created the template.
Creation date	Shows the date on which the template was created.
Version	Version number of the template.
Cloned from	Name of the template from which this template has been cloned (<i>Create > Create Clone</i>).
New version of	Name of the template which was the basis for the new version (<i>Create > Create New Version</i>).

6.3.2 Tab E-Learning Categories

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

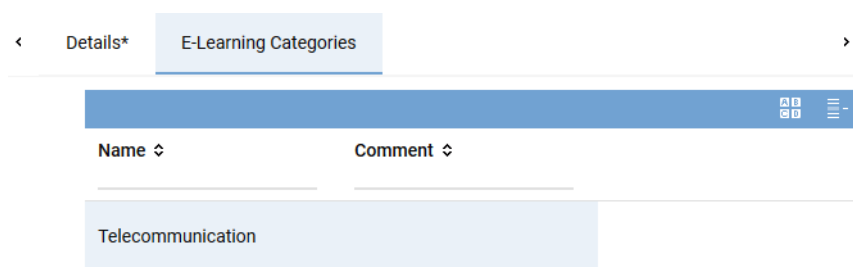








Fig. 60: Tab E-Learning Categories


	Administrate categories	Opens a window in which you can create new categories and select or delete already existing categories. See chapter "Create and add new category", p. 50 chapter "Assign existing category", p. 49 chapter "Delete category", p. 51
	Remove	Removes the assignment of the selected category. See chapter "Remove category assignment", p. 50.

See also

-  Create and add new category [► 50]
-  Assign existing category [► 49]
-  Remove category assignment [► 50]
-  Delete category [► 51]

6.4

Create template

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

<i>Create New</i>	A completely new template is created.
<i>Create New Version</i>	The selected template is the copy template for a new version. A new version is created. The version number is increased automatically. This option is only visible if templates already exist.
<i>Create Clone</i>	The selected template is the copy template for the new version of the template. A new independent template with the version number "1" is created. This option is only visible if templates already exist.

- 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:

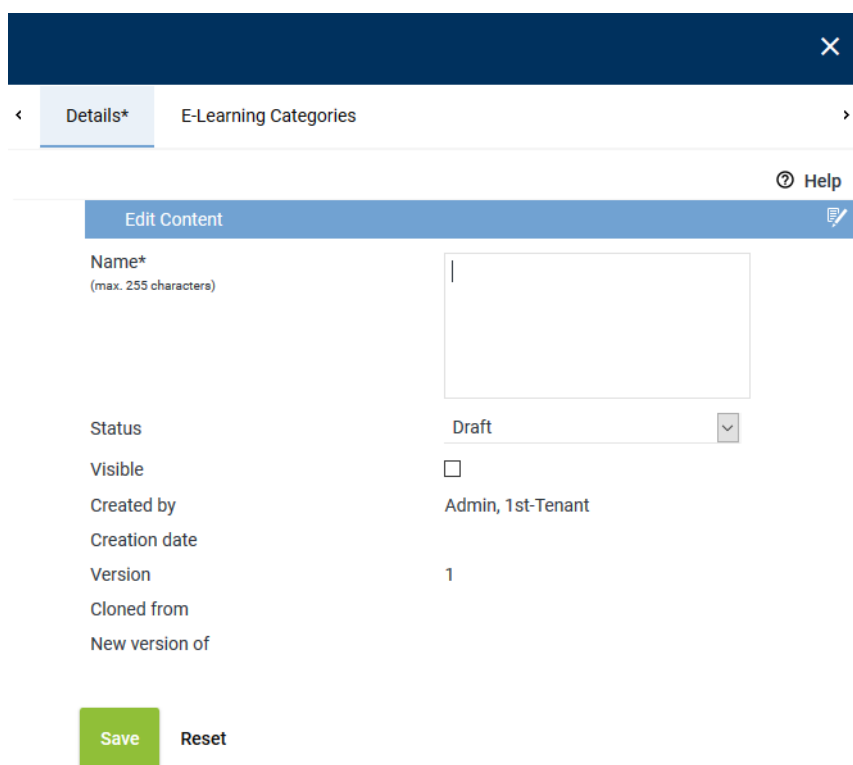



Fig. 61: Create template - detail view (example)

7. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 45.
 - *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 46.
8. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

6.5 Edit template

1. Select a template in the main view.
2. To open the selected template and edit it, click on the icon  (*Edit*) in the detail view.



You only can edit a template as long as it has the status *Draft*. You can only edit the template if no other user is currently editing it. If the template is currently edited by another user, a message is displayed informing you that the template has been locked and thus cannot be edited.

3. Set up the template according to your requirements.



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

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

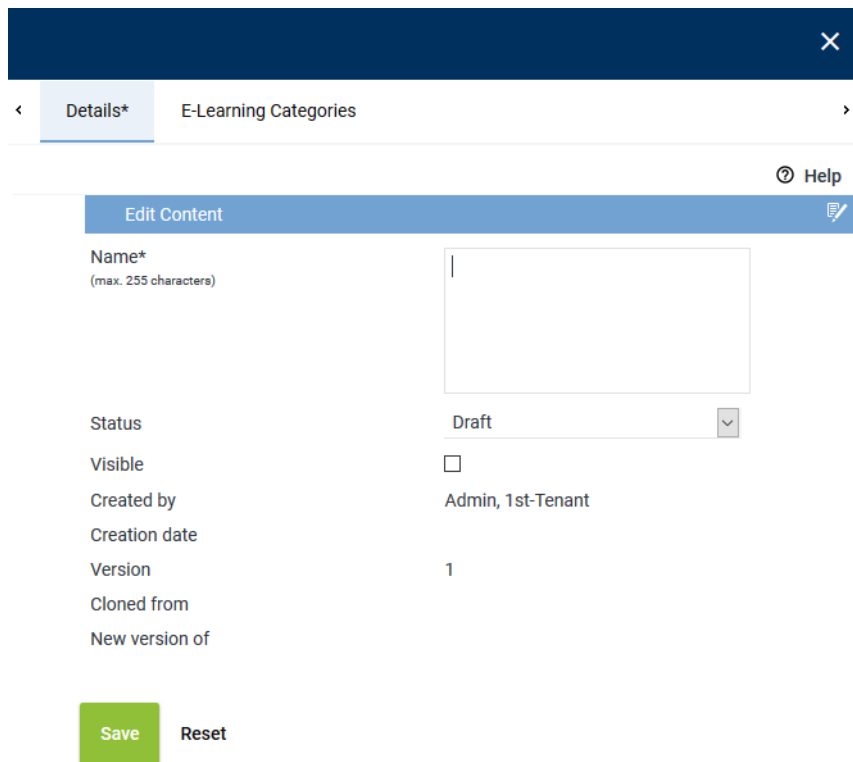



Fig. 62: Create template - detail view (example)

6. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 45.
 - *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 46.
7. To save the template once you have finished adjusting the entries in the tabs, click on the button **Save**.
To discard the entries and close the window, click on the button **Cancel**.

6.5.1 Assign existing category

1. Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 46.
2. Click on the icon  (*Administrate categories*).

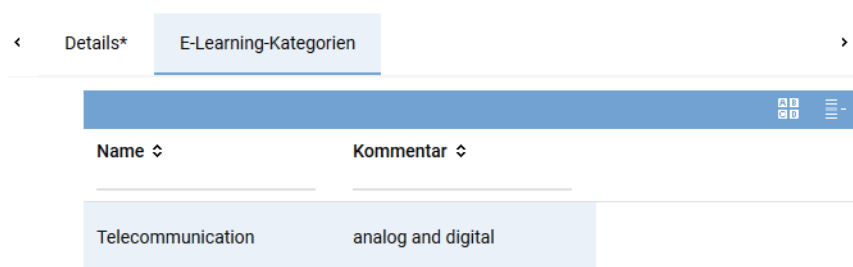


Fig. 63: Add existing category

3. Select a category from the list.

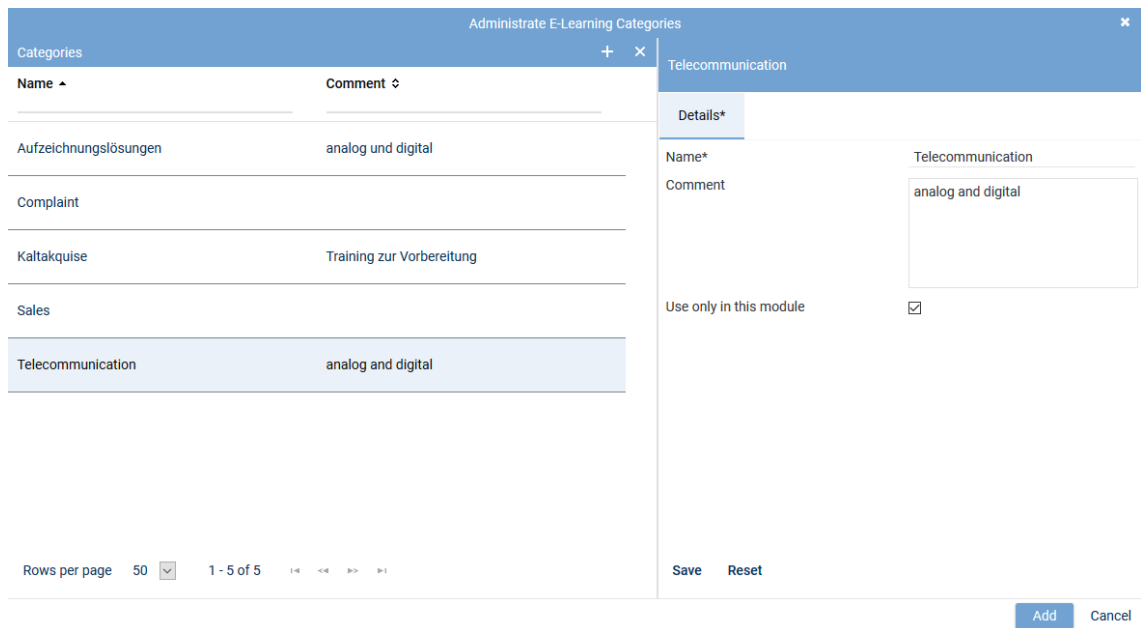



Fig. 64: Add category

- To apply the category to the template, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

6.5.2 Remove category assignment

- Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 46.
- To remove the assignment of a category, select the respective category in the list and click on the icon  (*Remove*).

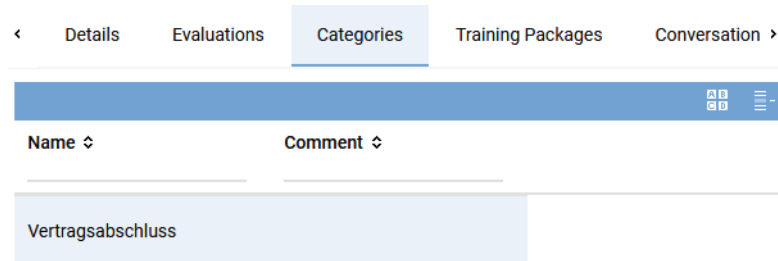



Fig. 65: Remove category assignment (example)

6.5.3 Create and add new category

- Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 46.
- Click on the icon  (*Administrate categories*).

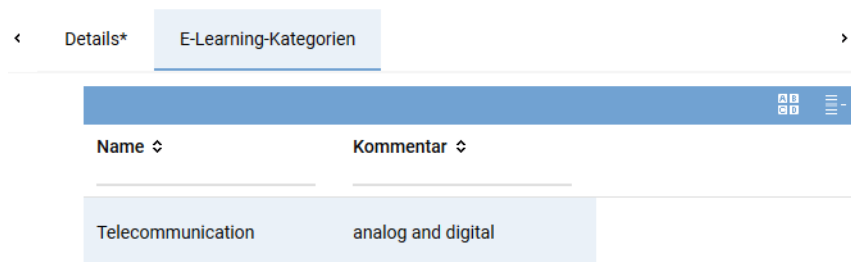


Fig. 66: Create new category

- Click on the icon  (*Create*) in the toolbar.

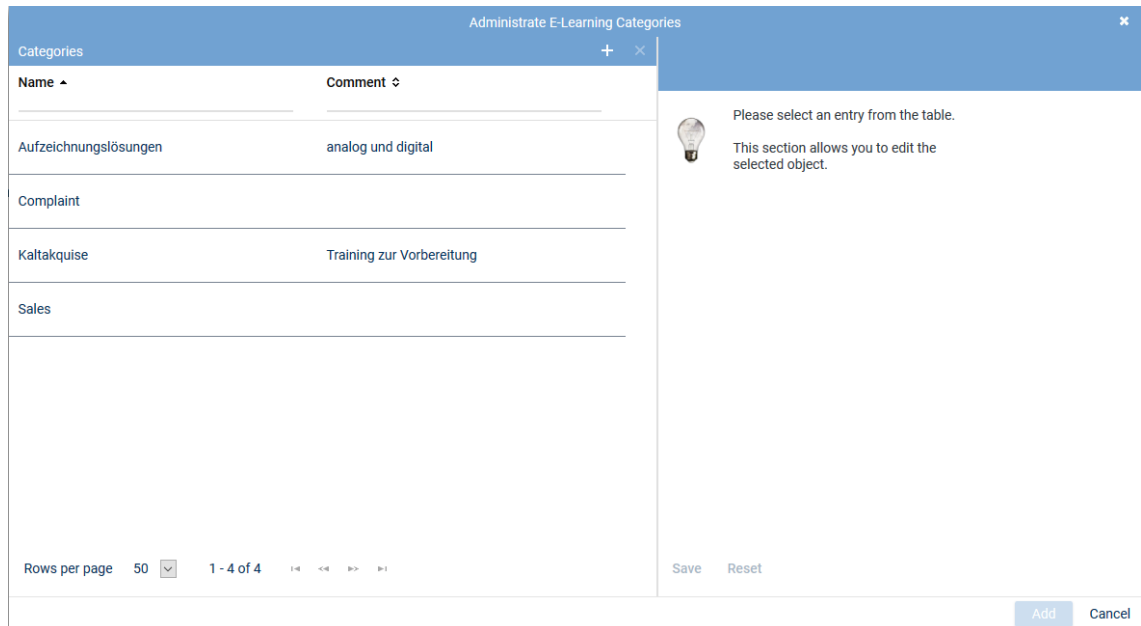


Fig. 67: Create new category

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

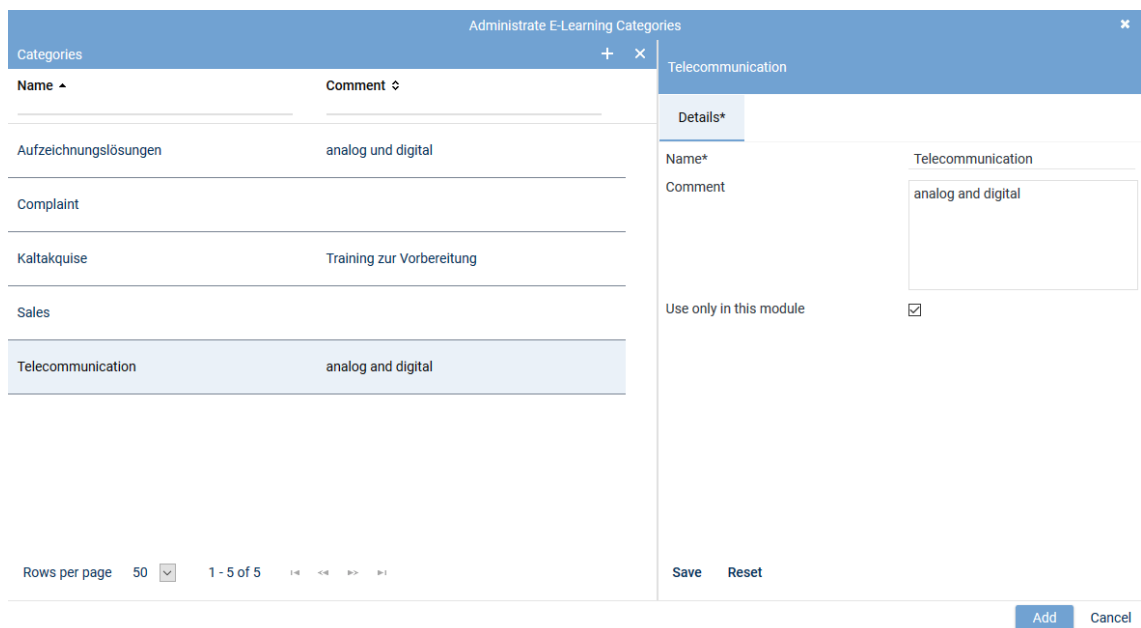


Fig. 68: Create new category

5. If required, enter a comment for the category in the entry field *Comment*.
6. By clicking on the check box *Only use in this module*, you can select whether the category is available exclusively in this module.
 - ☒ = Category can only be used in this module.
 - ☐ = Category can also be used in other modules.
7. To save the category, click on the button *Save*.
To discard entries which have not yet been saved, click on the button *Reset*.
8. To apply the category to the template, click on the button *Add*.
To close the window without adding the category, click on the button *Cancel*.

6.5.4 Delete category

1. Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 46.

2. Click on the icon  (*Administrate categories*).

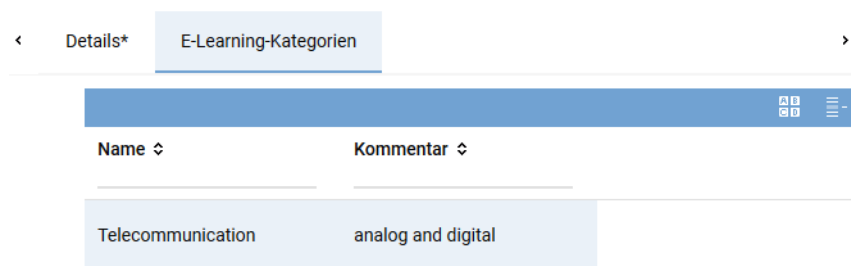


Fig. 69: Delete category

3. From the list, select the category you would like to delete.

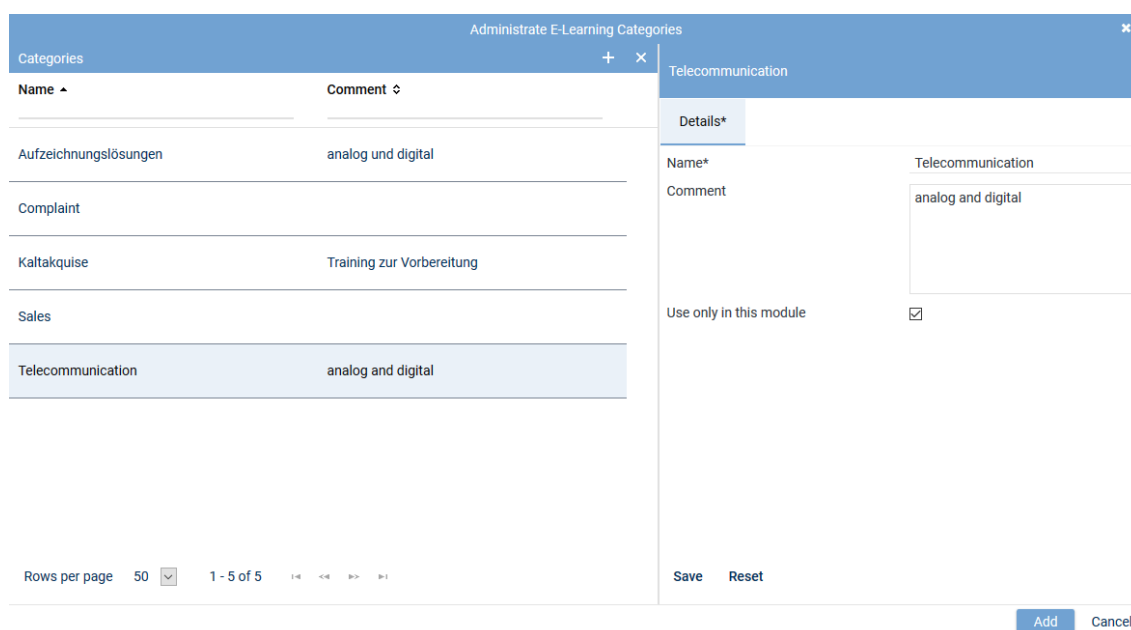


Fig. 70: Delete category


4. To delete the category, click on the icon  (*Delete*) in the toolbar.



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

5. To close the window, click on the icon .

See also

 Tab E-Learning Categories [► 46]

7 Quiz Templates module

7.1 General

In the Quiz Templates module, you can create and administrate quiz template.

Quiz templates are forms which are created by supervisors or quality managers. The quiz templates can be assigned to the agents in the E-Learning module. By assigning it to an agent, the quiz template becomes a quiz. This quiz can be used by the agent to test his own knowledge or it can be used by a supervisor to test the agent.

Creating a quiz template

Besides creating a new quiz template, it is possible to create a new version of a quiz for example when the already existing quiz is supposed to be edited later on. An existing template can be used as the basis for a new quiz, too, which allows adopting the layout of the template. Just as in the Evaluation Templates module, the template generator helps you to create a quiz template. By means of different elements you can compile the content and subsequently adjust the settings of the template in the detail view. If required, you can activate a quality alarm to ensure that the supervisor or team leader is notified if a predefined threshold value is not reached.

Creating categories for quiz templates

Just like training package templates, quiz templates can be saved in certain categories to make it easier to retrieve them later on.









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

As user with the access right for a Templates module you can only access your own templates and the global templates of other users.

7.2 Main view



In the main view, all saved quiz templates are displayed.




Name	Created By	Version	Status	Visible	Cloned From	New Version Of
Voice Recording 2	Admin, 1st-Tenant	1				
Voice Recording Klon	Admin, 1st-Tenant	1			Voice Recording	
Voice Recording	Admin, 1st-Tenant	1				

Rows per page: 50 1 - 3 of 3

Fig. 71: Quiz templates - main view

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

Name	Name of the template
Created by	Name of the user who has created the template.
Visible	Shows whether the template is visible for other users.  = Template is visible.  = Template is invisible.
Version	Version number of the template
Status	Shows the editing status of the template.

	 = Template has been released.  = Template is a draft.  = Template has been deactivated.
<i>Cloned from</i>	Name of the template from which this template has been cloned (function <i>Create</i> > <i>Create Clone</i>).
<i>New version of</i>	Name of the template which has been the basis for the new template (function <i>Create</i> > <i>Create New Version</i>).
<i>Creation date</i>	Shows the date on which the template was created.
<i>Updated</i>	Shows the date on which the template was updated for the last time.

7.3

Detail view

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

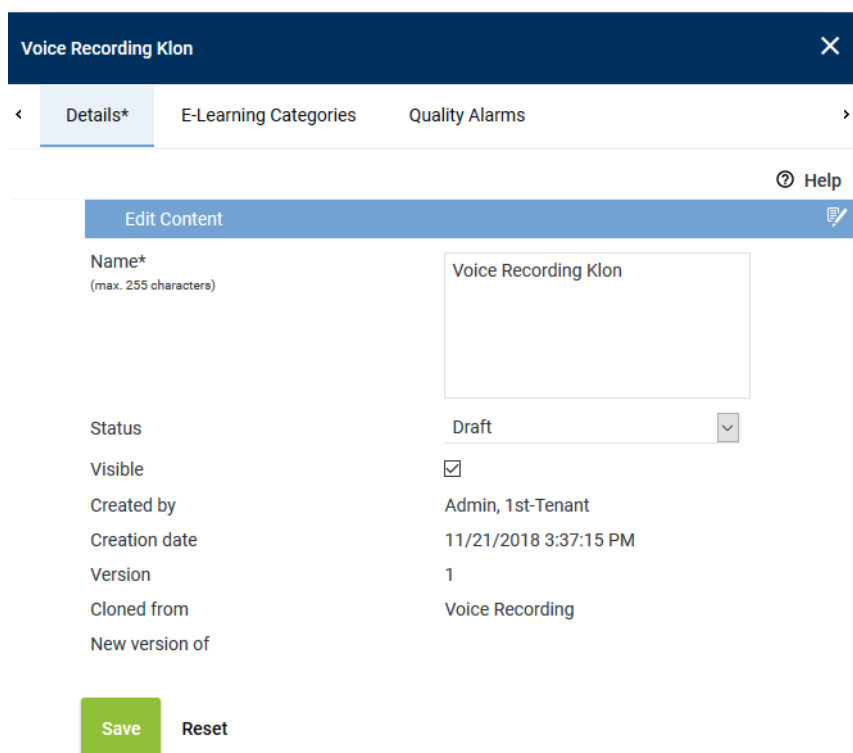


Fig. 72: Quiz templates - detail view

The detail view consists of the following tabs:

- **Details**
Here, you can display and edit detailed information about the selected template.
See [chapter "Tab Details", p. 54](#).
- **E-Learning Categories**
Here, you can add or remove categories.
See [chapter "Tab E-Learning Categories", p. 55](#).
- **Quality Alarms**
Here, you can display and edit threshold values (quality alarms) for the quiz results.
See [chapter "Tab Quality Alarms", p. 19](#)

7.3.1

Tab Details

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

< **Details*** E-Learning-Kategorien Quality Alarms >

Hilfe

Inhalt bearbeiten

Name*
 (max. 255 Zeichen)

Voice Recording Klon

Status Entwurf

Sichtbar ☒

Erstellt von Admin, 1st-Tenant

Erstelldatum 21.11.2018 15:37:15

Version 1

Geklont von Voice Recording

Neue Version von

Fig. 73: Details

Name	Name of the template. Enter the name of the template here. NOTICE! To avoid confusion, a new template cannot be saved under the same name as an already existing one. Enter an unambiguous name for the template.
Status	Shows the editing status of the template. Select the status of the template. Possible options: <ul style="list-style-type: none"> • <i>Draft</i> • <i>Released</i> There can only be 1 released version of a template. • <i>Deactivated</i> (only possible for templates which have already been released) A deactivated template cannot be activated again. To be able to access the contents of a deactivated template, you have to create a new version of the template.
Visible	Shows whether the template is visible for other users. Select whether the template is supposed to be visible. <input checked="" type="checkbox"/> = Template is visible. <input type="checkbox"/> = Template is invisible.
Created by	Name of the user who has created the template.
Creation date	Shows the date on which the template was created.
Version	Version number of the template
Cloned from	Name of the template from which this template has been cloned (<i>Create > Create Clone</i>).
New version of	Name of the template which has been the basis for this version (<i>Create > Create New Version</i>).

7.3.2

Tab E-Learning Categories

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

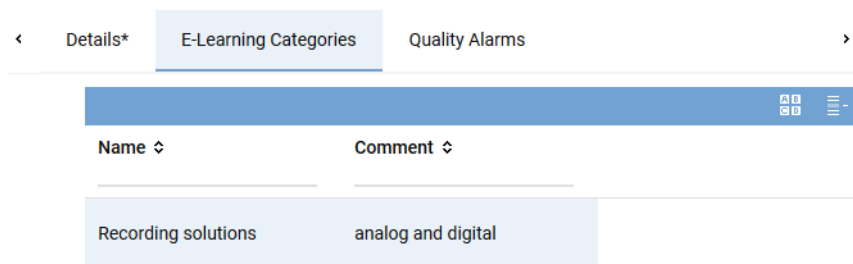




Fig. 74: Tab E-Learning Categories

	<p>Administrate categories</p> <p>Opens a window in which you can create new categories and select or delete already existing categories.</p> <p>See chapter "Create and add new category", p. 60</p> <p>chapter "Assign existing category", p. 59</p> <p>chapter "Delete category", p. 62</p>
	<p>Remove</p> <p>Removes the assignment of the selected category.</p> <p>See chapter "Remove category assignment", p. 60.</p>

See also

- Assign existing category [▶ 59]
- Remove category assignment [▶ 60]
- Create and add new category [▶ 60]
- Delete category [▶ 62]

7.3.3 Tab Quality Alarms

Here, you can display and edit quiz threshold values (quality alarms).

If a score is below the defined threshold value, then you can inform previously selected groups of persons automatically with this function.

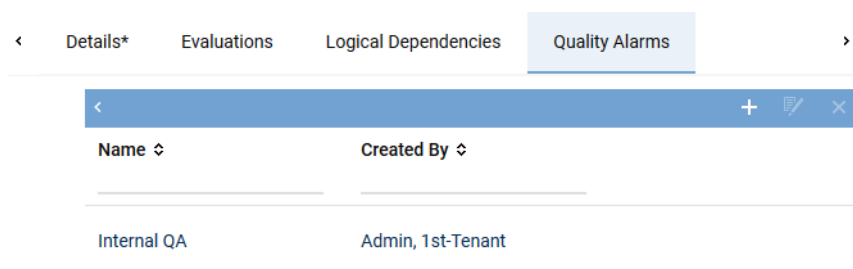






Fig. 75: Quality alarms (reduced view)

	<i>Create specific quality alarm</i>	Creates a new quality alarm, see chapter "Edit or create specific quality alarm", p. 63 .
	<i>Edit specific quality alarm</i>	Opens the selected quality alarm for editing, see chapter "Edit or create specific quality alarm", p. 63 .
	<i>Delete</i>	Deletes the selected quality alarm, see chapter "Delete specific quality alarm", p. 71 .

1. To expand the display, click on the icon  (*Expand/Collapse*).















Type	Name	Created By	Creation Date	Activated	Global	Minimum Number of Evaluations
	Internal QA	Admin, 1st-Tenant				


Fig. 76: Quality alarms (expanded view)

- To collapse the display, click on the icon  (*Expand/Collapse*).

Type	Type of the quality alarm  = global quality alarm for quiz templates  = specific quality alarm for quiz templates
Name	Name of the template
Created By	Name of the user who has created the quality alarm.
Creation Date	Shows the date on which the template was created.
Activated	Shows whether the quality alarm has been activated.  = Quality alarm has been activated.  = Quality alarm has been deactivated.
Global	Shows whether a global quality alarm has been released for all or only for selected quiz templates.  = Global quality alarm has been released for all quiz templates.  = Global quality alarm has been released for selected quiz templates only.
Minimum Number of Evaluations	Shows how many evaluations have to be made at least before the quality alarm is analyzed.
Per Agent	Shows whether the quality alarm is supposed to be applied to individual agents.  = Apply to individual agents.  = Apply to all selected agents.
All Agents	Here, you can define whether the quality alarm is supposed to be applied to all agents known to the system.  = Apply to all agents.  = Apply only to the assigned agents.
Monitored Score	Shows the total score which is monitored as threshold value.
Rating Scheme	Shows which rating scheme is used.

7.4

Create template

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

Create New	A completely new template is created.
Create New Version	The selected template is the copy template for a new version. A new version is created. The version number is increased automatically. This option is only visible if templates already exist.
Create Clone	The selected template is the copy template for the new version of the template. A new independent template with the version number "1" is created.

This option is only visible if templates already exist.

3. The template generator opens:
4. Set up the template according to your requirements.



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

5. 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*.
6. The following window appears:

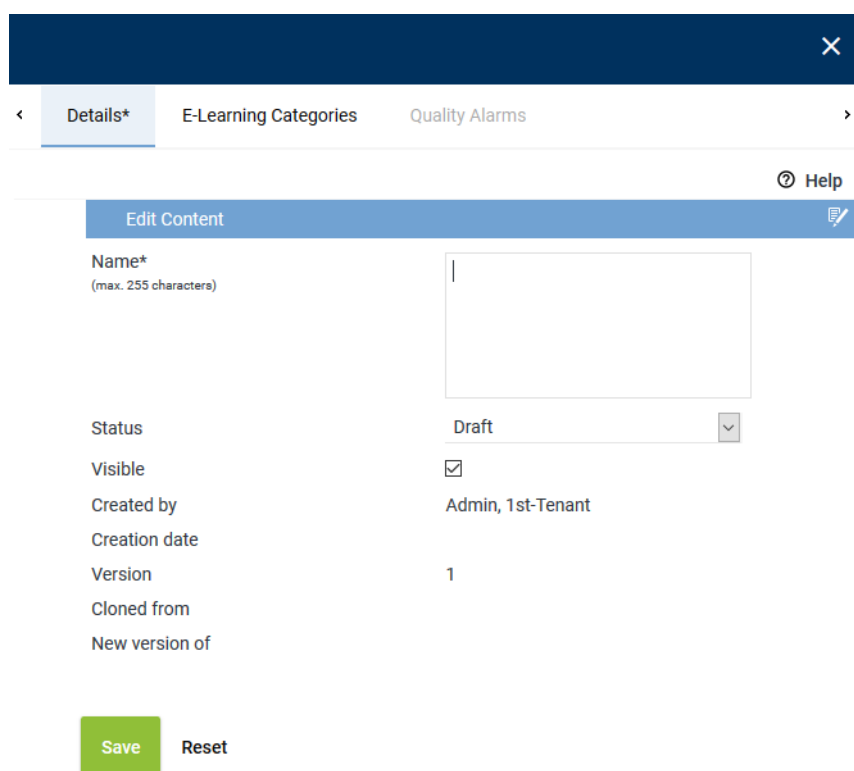



Fig. 77: Create template - detail view (example)

7. Adjust all necessary settings within the displayed tabs.
 - *Details*, see [chapter "Tab Details"](#), p. 54.
 - *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 55.
 - *Quality Alarms*, see [chapter "Tab Quality Alarms"](#), p. 19.
8. To save the template once you have finished adjusting the entries in the tabs, click on the button *Save*.
To discard the entries and close the window, click on the button *Cancel*.

7.5

Edit template

1. Select a template in the main view.
2. To open the selected template and edit it, click on the icon  (*Edit*) in the detail view.



You only can edit a template as long as it has the status *Draft*. You can only edit the template if no other user is currently editing it. If the template is currently edited by another user, a message is displayed informing you that the template has been locked and thus cannot be edited.

- 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:

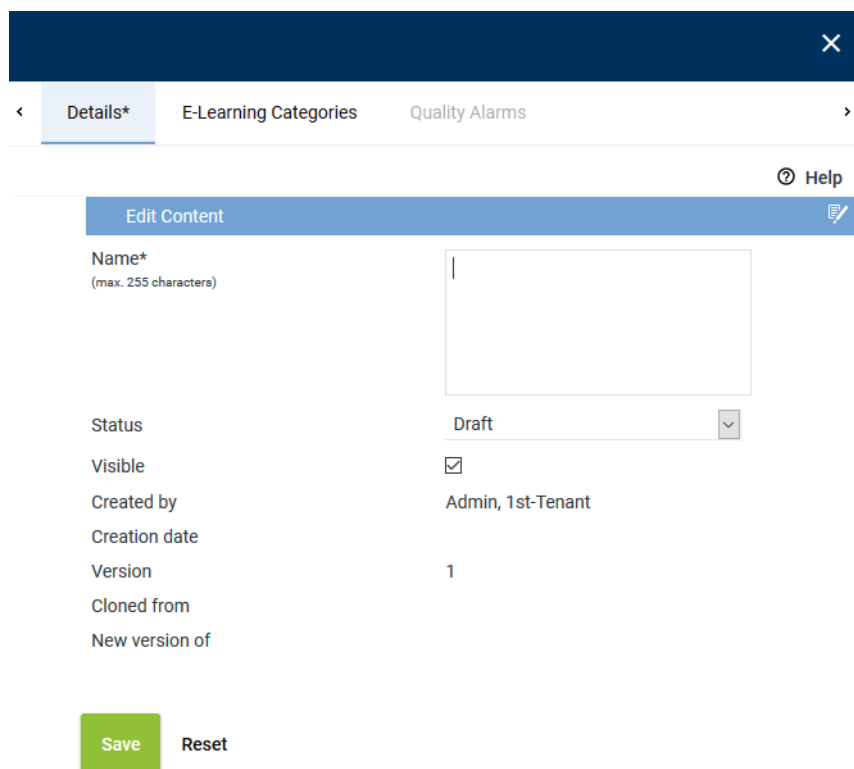

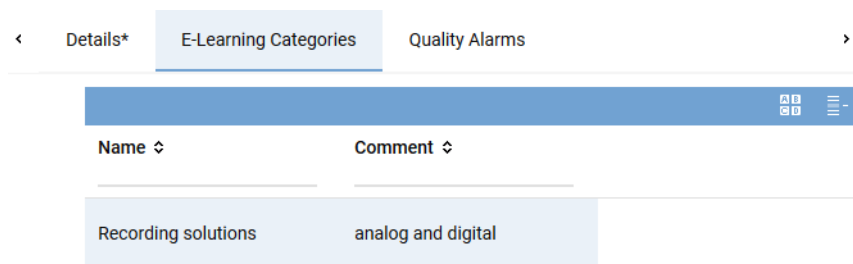


Fig. 78: Create template - detail view (example)

- Adjust all necessary settings within the displayed tabs.
 - Details*, see [chapter "Tab Details", p. 54](#).
 - E-Learning Categories*, see [chapter "Tab E-Learning Categories", p. 55](#).
 - Quality Alarms*, see [chapter "Tab Quality Alarms", p. 19](#).
- To save the template once you have finished adjusting the entries in the tabs, click on the button *Save*.
To discard the entries and close the window, click on the button *Cancel*.

7.5.1 Assign existing category

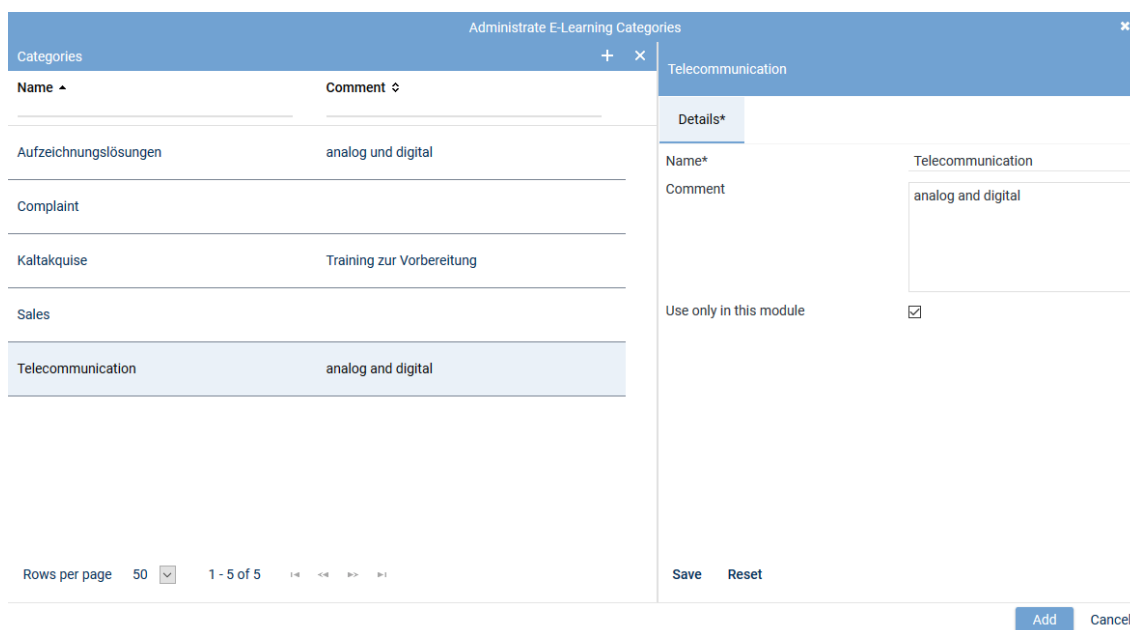
- Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories", p. 55](#).
- Click on the icon  (*Administrate categories*).



Name	Comment
Recording solutions	analog and digital

Fig. 79: Add existing category

3. Select a category from the list.



Name	Comment
Aufzeichnungslösungen	analog und digital
Complaint	
Kaltakquise	Training zur Vorbereitung
Sales	
Telecommunication	analog and digital

Telecommunication

Name*

Comment

Use only in this module ☒


Save Reset

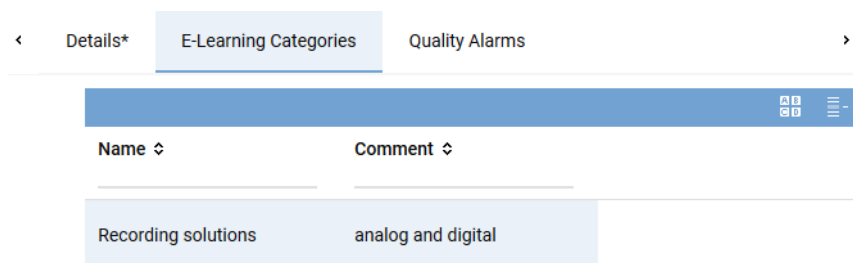
Add Cancel

Fig. 80: Add category

4. To apply the category to the template, click on the button *Add*.
To discard the selection and close the window, click on the button *Cancel*.

7.5.2 Remove category assignment


1. Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories", p. 55](#).
2. To remove the assignment of a category, select the respective category in the list and click on the icon  (*Remove*).



Name	Comment
Recording solutions	analog and digital

Fig. 81: Remove category assignment (example)

7.5.3 Create and add new category

1. Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories", p. 55](#).
2. Click on the icon  (*Administrate categories*).

< Details* E-Learning Categories Quality Alarms >

Name ↕	Comment ↕
Recording solutions	analog and digital

Fig. 82: Create new category

- Click on the icon  (Create) in the toolbar.

Administrate E-Learning Categories

Name ▲	Comment ↕
Aufzeichnungslösungen	analog und digital
Complaint	
Kaltakquise	Training zur Vorbereitung
Sales	

Rows per page 50 1 - 4 of 4

Save Reset

Please select an entry from the table.

This section allows you to edit the selected object.

Add Cancel

Fig. 83: Create new category

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

Administrate E-Learning Categories

Name ▲	Comment ↕
Aufzeichnungslösungen	analog und digital
Complaint	
Kaltakquise	Training zur Vorbereitung
Sales	
Telecommunication	analog and digital

Rows per page 50 1 - 5 of 5

Save Reset

Telecommunication

Details*

Name* Telecommunication

Comment analog and digital

Use only in this module ☒


Add Cancel

Fig. 84: Create new category

- If required, enter a comment for the category in the entry field *Comment*.

6. By clicking on the check box *Only use in this module*, you can select whether the category is available exclusively in this module.
 - ☒ = Category can only be used in this module.
 - ☐ = Category can also be used in other modules.
7. To save the category, click on the button *Save*.
To discard entries which have not yet been saved, click on the button *Reset*.
8. To apply the category to the template, click on the button *Add*.
To close the window without adding the category, click on the button *Cancel*.

7.5.4 Delete category

1. Select the tab *E-Learning Categories*, see [chapter "Tab E-Learning Categories"](#), p. 55.
2. Click on the icon  (*Administrate categories*).

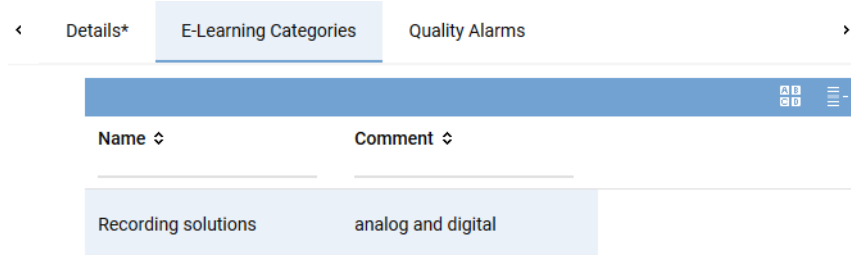


Fig. 85: Delete category

3. From the list, select the category you would like to delete.

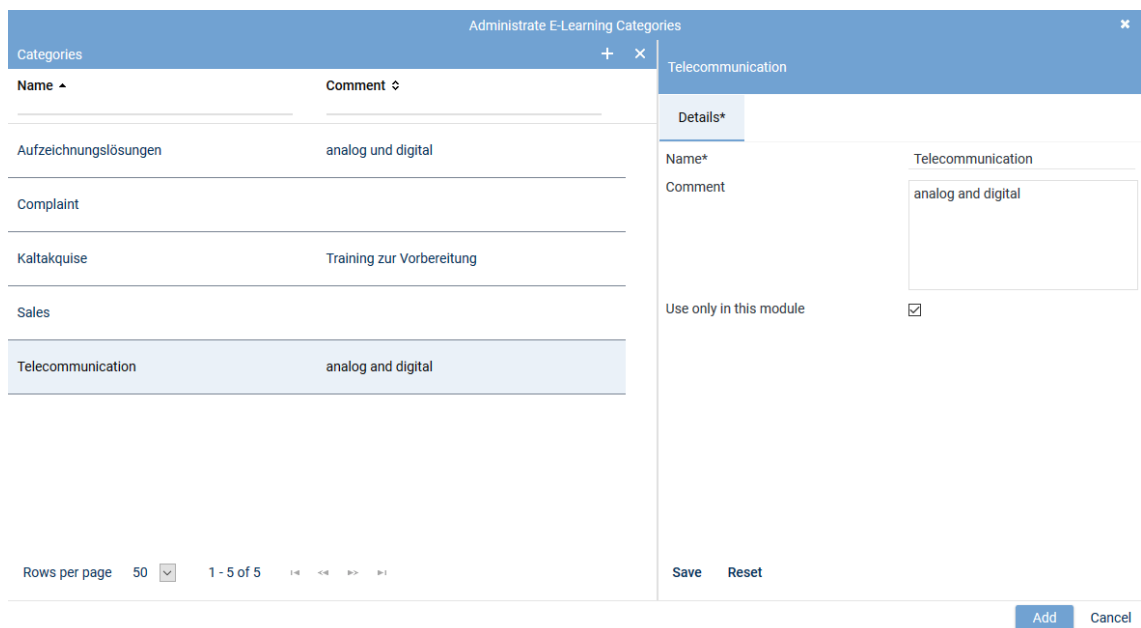



Fig. 86: Delete category

4. To delete the category, click on the icon  (*Delete*) in the toolbar.





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

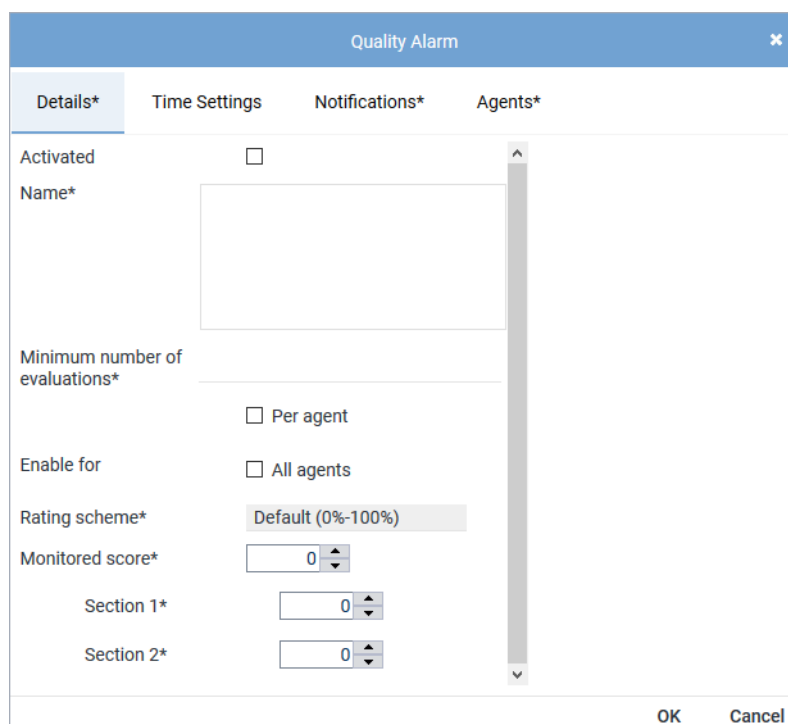
5. To close the window, click on the icon  (*Close*).

See also

 [Tab E-Learning Categories](#) [► 55]

7.5.5 Edit or create specific quality alarm

1. Select the tab *Quality Alarms*, see [chapter "Tab Quality Alarms", p. 19](#).
2. To define a new specific quality alarm, click on the icon  (*Create*).
To edit an existing specific quality alarm, select the specific quality alarm in the list and click on  (*Edit specific quality alarm*).
⇒ The following window appears:



The dialog box titled "Quality Alarm" has a close button (X) in the top right corner. It contains four tabs: "Details*", "Time Settings", "Notifications*", and "Agents*". The "Details*" tab is currently selected and shows the following fields:

- Activated**: A checkbox that is currently unchecked.
- Name***: A large text input field.
- Minimum number of evaluations***: A text input field.
- Enable for**: Two checkboxes, "Per agent" and "All agents", both of which are unchecked.
- Rating scheme***: A dropdown menu showing "Default (0%-100%)".
- Monitored score***: A numeric input field with a value of 0 and up/down arrows.
- Section 1***: A numeric input field with a value of 0 and up/down arrows.
- Section 2***: A numeric input field with a value of 0 and up/down arrows.

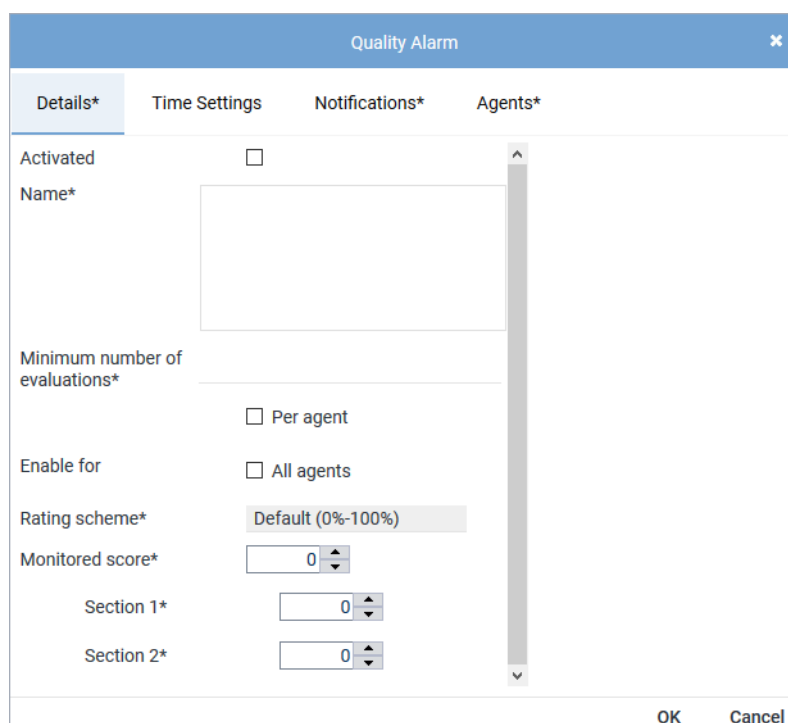
At the bottom right of the dialog box are "OK" and "Cancel" buttons.

Fig. 87: Create or edit specific quality alarm

3. Adjust all necessary settings within the 4 tabs.
 - *Details*, see [chapter "Tab Details", p. 63](#)
 - *Time Settings*, see [chapter "Tab Time Settings", p. 65](#)
 - *Notifications*, see [chapter "Tab Notifications", p. 65](#)
 - *Agents*, see [chapter "Tab Agents", p. 69](#).
4. To save the settings, click on the button *OK*.
To discard the settings or the changes and close the window, click on the button *Cancel*.

7.5.5.1 Tab Details

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



The image shows a 'Quality Alarm' dialog box with a blue header and a close button. It has four tabs: 'Details*', 'Time Settings', 'Notifications*', and 'Agents*'. The 'Details*' tab is active. It contains the following fields:

- Activated**: A checkbox.
- Name***: A text input field.
- Minimum number of evaluations***: A text input field.
- Enable for**: Two checkboxes, 'Per agent' and 'All agents'.
- Rating scheme***: A dropdown menu showing 'Default (0%-100%)'.
- Monitored score***: A numeric input field with a value of 0.
- Section 1***: A numeric input field with a value of 0.
- Section 2***: A numeric input field with a value of 0.

At the bottom right are 'OK' and 'Cancel' buttons.

Fig. 88: Specific quality alarm - define details

Activated	Shows whether the quality alarm has been activated. Select whether the quality alarm is supposed to be activated. <input checked="" type="checkbox"/> = Quality alarm has been activated. <input type="checkbox"/> = Quality alarm has been deactivated.
Name	Name of the quality alarm. Enter the name of the quality alarm here.
Minimum Number of Evaluations	Shows how many evaluations have to be made at least before the quality alarm is analyzed. Enter the number of the necessary evaluations.
Per Agent	Shows whether the quality alarm is supposed to be applied to individual agents. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to individual agents. <input type="checkbox"/> = Apply to all selected agents.
All Agents	Here, you can define whether the quality alarm is supposed to be applied to all agents known to the system. Select the way the quality alarm is supposed to be used. <input checked="" type="checkbox"/> = Apply to all agents. <input type="checkbox"/> = Apply only to the assigned agents. (Assign agents see chapter "Tab Agents", p. 69)
Rating Scheme	Shows which rating scheme is used. (The displayed value cannot be changed.)
Monitored Score	Shows the total score which is monitored as threshold value. Enter a score for the threshold value.
Section 1	If sections have been created in the template, then the sections' score is displayed here which is monitored as threshold value. Enter a score for the threshold value.

NOTICE! The section's name is exemplary as you will see the exact name of the section as it has been entered for the section when creating the template. If no sections have been created, this option is not available.

7.5.5.2 Tab Time Settings

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

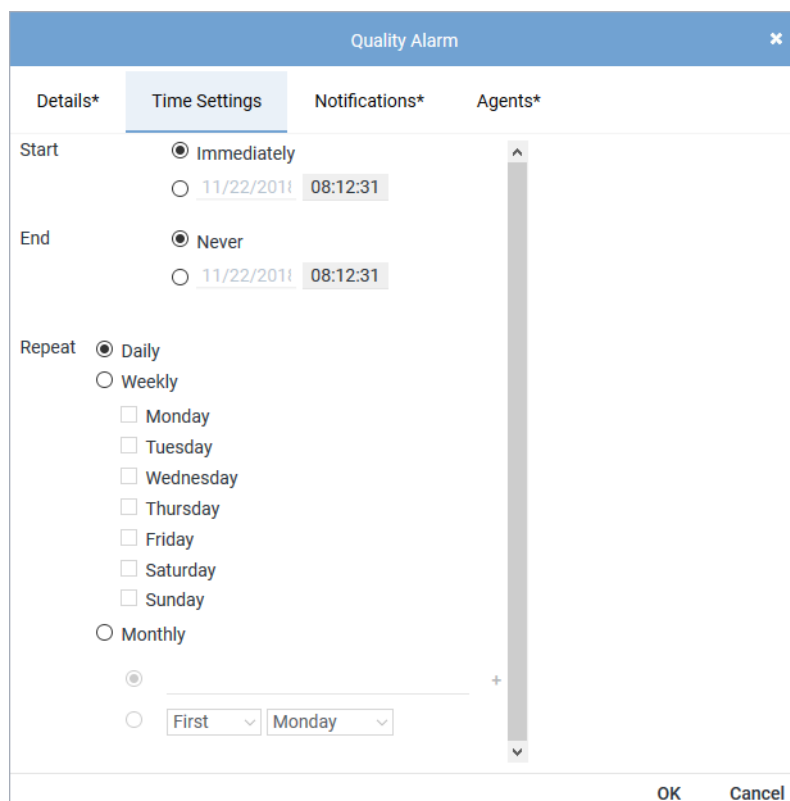
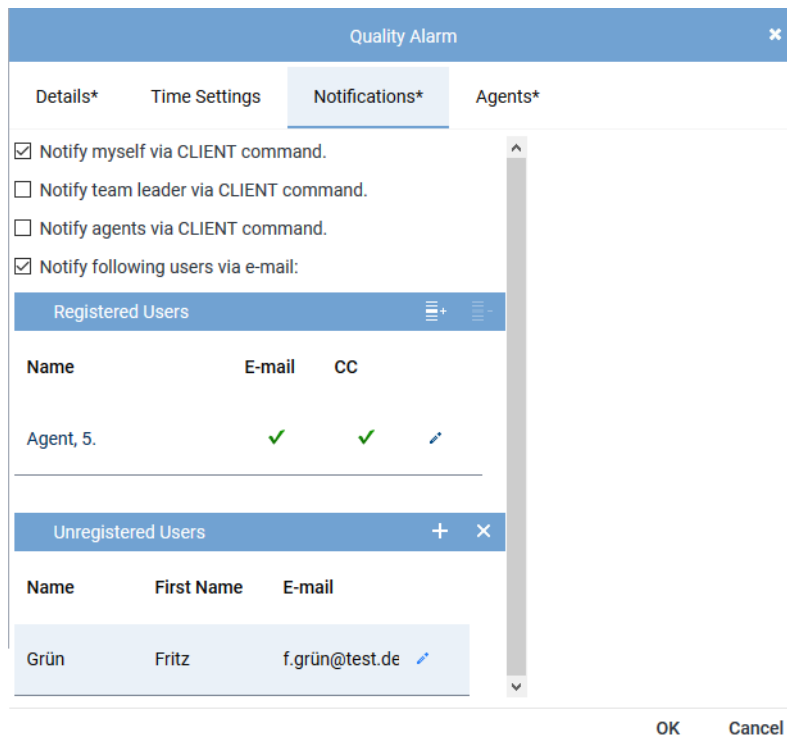


Fig. 89: Specific quality alarms - time settings

Start	Shows the time when the check starts. Define the point in time when the regular check is supposed to start.
End	Shows the time when the check ends. Define the point in time when the regular check is supposed to end.
Repeat	Shows the intervals of the check. Select the intervals in which the check is supposed to take place.

7.5.5.3 Tab Notifications

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



The dialog box 'Quality Alarm' has four tabs: Details*, Time Settings, Notifications* (selected), and Agents*. Under the Notifications* tab, there are four checkboxes: 'Notify myself via CLIENT command.' (checked), 'Notify team leader via CLIENT command.' (unchecked), 'Notify agents via CLIENT command.' (unchecked), and 'Notify following users via e-mail:' (checked). Below these are two tables. The 'Registered Users' table has columns 'Name', 'E-mail', and 'CC'. It contains one row: 'Agent, 5.' with a green checkmark in the 'E-mail' column and a green checkmark in the 'CC' column. The 'Unregistered Users' table has columns 'Name', 'First Name', and 'E-mail'. It contains one row: 'Grün' with 'Fritz' as the first name and 'f.grün@test.de' as the email address. At the bottom right are 'OK' and 'Cancel' buttons.


Fig. 90: Specific quality alarm - notifications

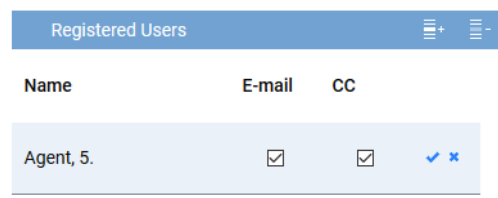
1. To notify the creator, supervisors or agents directly via CLIENT*command*, set a check mark in the respective check box ☒.
2. To notify certain users, set the check mark in the check box *Notify following users via e-mail*.
 - ⇒ Additional fields are displayed which allow assigning users and configuring the notification type. See [chapter "Assign registered users", p. 66](#) and [chapter "Assign unregistered users", p. 68](#).

In the column *E-mail*, the check mark shows whether the user is notified via e-mail or via CLIENT*command*:

 - ✓ = notification option activated
 - ✗ = notification option not activated

7.5.5.3.1 Assign registered users

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




The 'Registered Users' table has columns 'Name', 'E-mail', and 'CC'. It contains one row: 'Agent, 5.' with a checkmark in the 'E-mail' column and a checkmark in the 'CC' column. To the right of the 'CC' column are two small icons: a blue checkmark and a blue 'x'.

Fig. 91: Specific quality alarm - registered users (example)

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

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

Fig. 92: Specific quality alarm - select registered users (example)

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



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

Fig. 93: Specific quality alarm - edit registered users (example)

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






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

Fig. 94: Specific quality alarm - configure type of notification (example)

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


7.5.5.3.2 Remove registered users

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

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

Fig. 95: Specific quality alarm - remove registered user (example)

7.5.5.3.3 Assign unregistered users

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

Add Unregistered User


First name*
Last name*
E-mail*

Save Cancel

Fig. 96: Specific quality alarm - add unregistered users

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

7.5.5.3.4 Edit unregistered users

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



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

Fig. 97: Specific quality alarm - unregistered users (example)


2. Make the required changes.

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

Fig. 98: Specific quality alarm - edit unregistered users (example)

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

7.5.5.3.5 Delete unregistered users

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

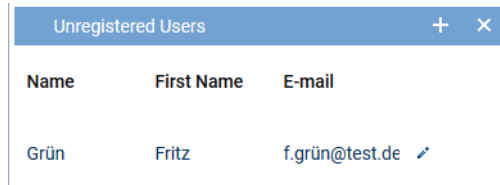


Fig. 99: Specific quality alarm - delete unregistered users (example)

7.5.5.4 Tab Agents

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

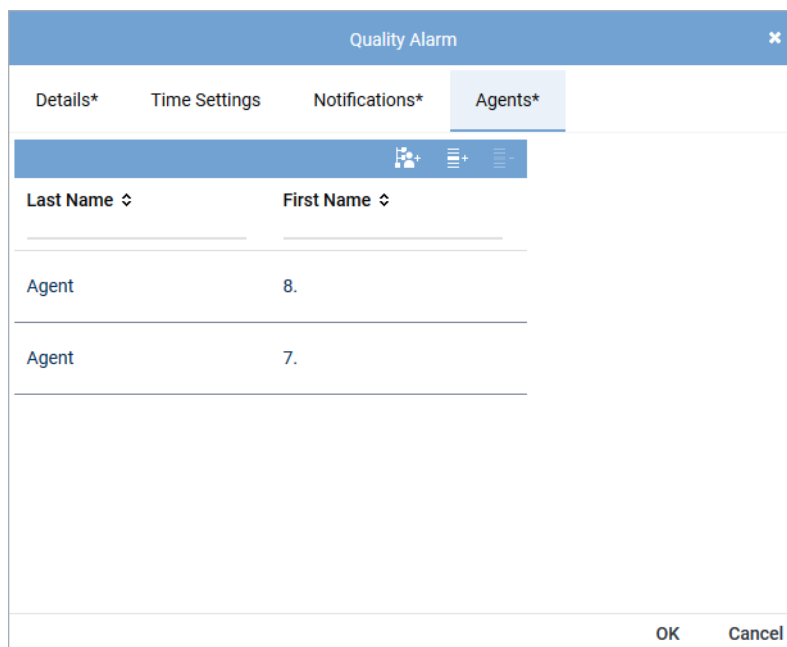




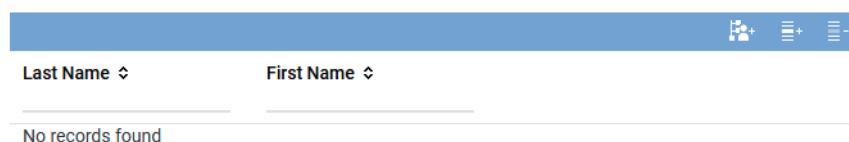


Fig. 100: Specific quality alarm - assign agents

	<i>Add from organization structure</i>	Opens a window in which you can select agents from the organization structure, see chapter "Add agents from organization structure", p. 69 .
	<i>Add</i>	Opens a window in which you can add your own agents, see chapter "Add agents", p. 70 .
	<i>Remove</i>	Removes the selected agent from the list.

7.5.5.4.1 Add agents from organization structure

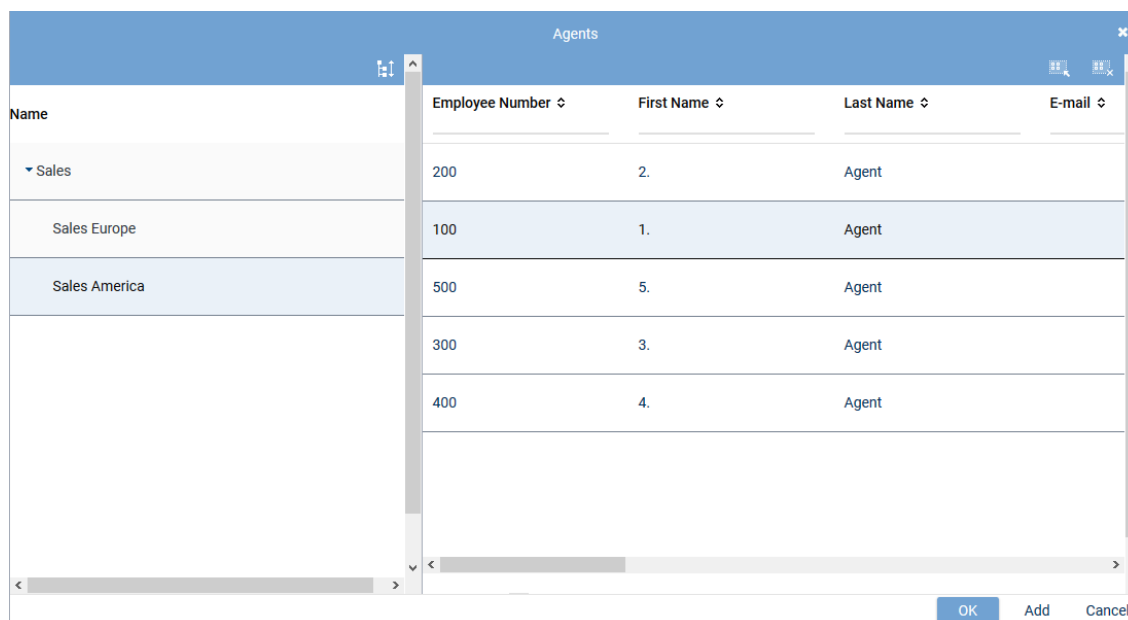
1. Select the tab *Agents*, see [chapter "Tab Agents", p. 69](#).
2. To assign agents from the organization structure, click on the icon  (*Add from organization structure*).



Agents window showing search fields for Last Name and First Name. Below the fields, it states "No records found".

Fig. 101: Agents

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





Agents window showing a list of agents. The left pane displays organization units: Sales, Sales Europe, and Sales America. The main table lists agents with columns: Employee Number, First Name, Last Name, and E-mail.

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

Buttons at the bottom: OK, Add, Cancel.

Fig. 102: Add agents from organization structure


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

7.5.5.4.2 Add agents

- Select the tab *Agents*, see [chapter "Tab Agents", p. 69](#).



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

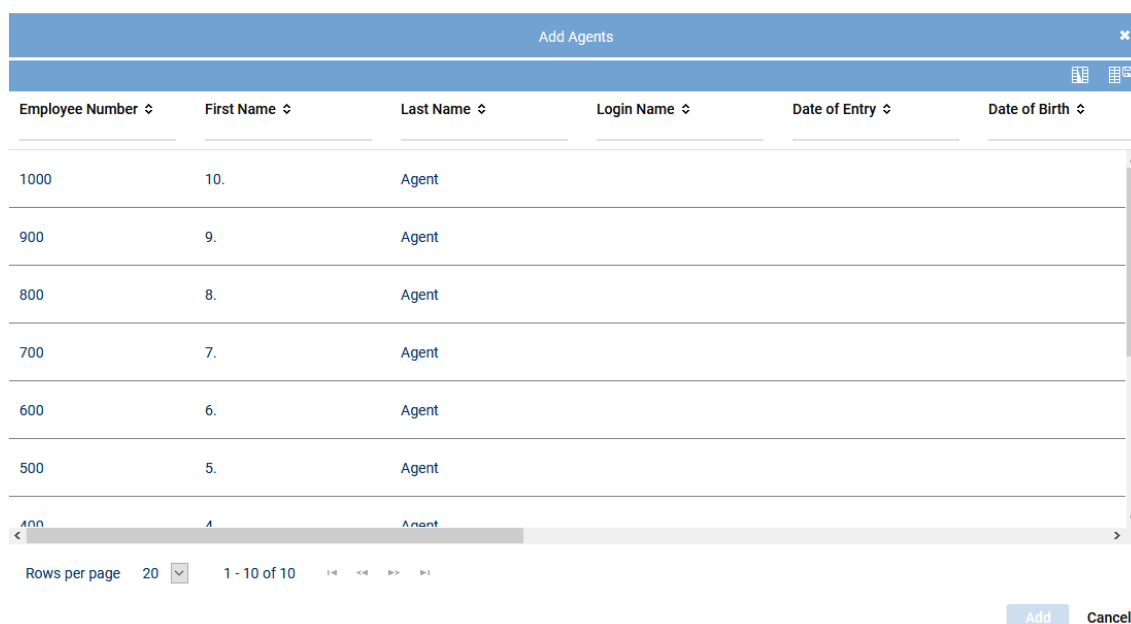
- To assign an agent, click on the icon  (*Add*).



Agents window showing search fields for Last Name and First Name. Below the fields, it states "No records found".

Fig. 103: Agents (example)

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




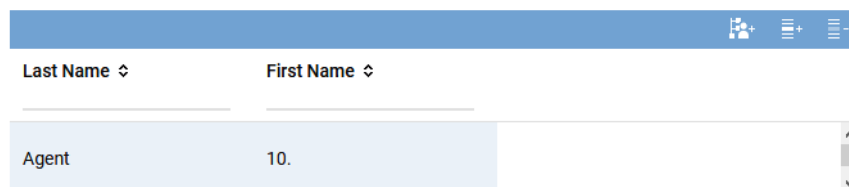
Employee Number	First Name	Last Name	Login Name	Date of Entry	Date of Birth
1000	10.	Agent			
900	9.	Agent			
800	8.	Agent			
700	7.	Agent			
600	6.	Agent			
500	5.	Agent			
400	4.	Agent			
300	3.	Agent			
200	2.	Agent			
100	1.	Agent			

Fig. 104: 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*.

7.5.5.4.3 Remove agent assignment


- Select the tab *Agents*, see [chapter "Tab Agents", p. 69](#).
- To remove the assignment of an agent, select the respective agent in the list and click on the icon  (*Remove*).

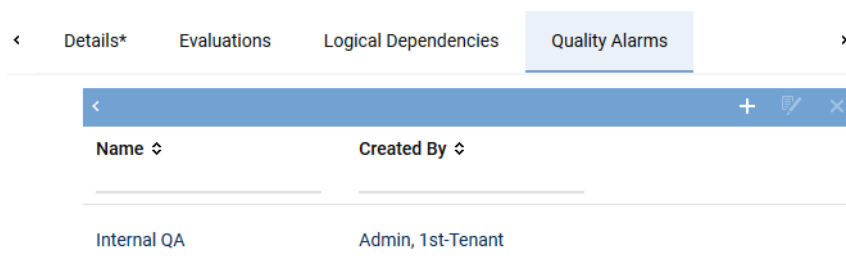


Last Name	First Name
Agent	10.

Fig. 105: Remove agent assignment

7.5.6 Delete specific quality alarm

- Select the tab *Quality Alarms*, see [chapter "Tab Quality Alarms", p. 19](#).
- To delete a specific quality alarm, select the corresponding entry in the list and click on the icon  (*Delete*).



Name	Created By
Internal QA	Admin, 1st-Tenant

Fig. 106: Delete specific quality alarm

List of figures

Fig. 1	Menu item Templates.....	6
Fig. 2	Toolbar of the main view (example).....	8
Fig. 3	Preview	9
Fig. 4	Preview result.....	9
Fig. 5	Load summary (example)	10
Fig. 6	Window Search Criteria (example)	10
Fig. 7	Evaluation templates - main view.....	13
Fig. 8	Evaluation templates - detail view.....	14
Fig. 9	Details (example)	15
Fig. 10	Evaluations (reduced view).....	17
Fig. 11	Evaluations (expanded view)	17
Fig. 12	Menu items View.....	18
Fig. 13	Evaluation (example)	18
Fig. 14	Logical Dependencies.....	19
Fig. 15	Logical dependencies, information.....	19
Fig. 16	Quality alarms (reduced view).....	20
Fig. 17	Quality alarms (expanded view).....	20
Fig. 18	Activate	21
Fig. 19	Add audio file	22
Fig. 20	Add file	22
Fig. 21	Upload File	22
Fig. 22	Choose file	23
Fig. 23	Open file.....	23
Fig. 24	Upload File	23
Fig. 25	Save file in file list.....	24
Fig. 26	Apply file to the element.....	24
Fig. 27	Add agent.....	24
Fig. 28	Add agent.....	25
Fig. 29	Create template - detail view (example).....	26
Fig. 30	Create template - detail view (example).....	28
Fig. 31	Define logical dependencies	29
Fig. 32	Logical dependencies - define source criterion.....	30
Fig. 33	Logical dependencies - define target criterion	30
Fig. 34	Show logical dependency	31
Fig. 35	Change logical dependency.....	32
Fig. 36	Show logical dependency	33
Fig. 37	Create or edit specific quality alarm	34
Fig. 38	Specific quality alarm - define details.....	35
Fig. 39	Specific quality alarms - time settings.....	36
Fig. 40	Specific quality alarm - notifications.....	37
Fig. 41	Specific quality alarm - registered users (example)	37

Fig. 42	Specific quality alarm - select registered users (example).....	38
Fig. 43	Specific quality alarm - edit registered users (example)	38
Fig. 44	Specific quality alarm - configure type of notification (example)	38
Fig. 45	Specific quality alarm - remove registered user (example)	39
Fig. 46	Specific quality alarm - add unregistered users	39
Fig. 47	Specific quality alarm - unregistered users (example)	39
Fig. 48	Specific quality alarm - edit unregistered users (example)	39
Fig. 49	Specific quality alarm - delete unregistered users (example)	40
Fig. 50	Specific quality alarm - assign agents	40
Fig. 51	Agents	41
Fig. 52	Add agents from organization structure	41
Fig. 53	Agents (example)	41
Fig. 54	Add own agents	42
Fig. 55	Remove agent assignment	42
Fig. 56	Delete specific quality alarm	42
Fig. 57	Training package templates - main view	44
Fig. 58	Training package templates - detail view	45
Fig. 59	Details	46
Fig. 60	Tab E-Learning Categories	47
Fig. 61	Create template - detail view (example).....	48
Fig. 62	Create template - detail view (example).....	49
Fig. 63	Add existing category	49
Fig. 64	Add category	50
Fig. 65	Remove category assignment (example).....	50
Fig. 66	Create new category	50
Fig. 67	Create new category	51
Fig. 68	Create new category	51
Fig. 69	Delete category	52
Fig. 70	Delete category	52
Fig. 71	Quiz templates - main view	53
Fig. 72	Quiz templates - detail view	54
Fig. 73	Details	55
Fig. 74	Tab E-Learning Categories	56
Fig. 75	Quality alarms (reduced view).....	56
Fig. 76	Quality alarms (expanded view).....	57
Fig. 77	Create template - detail view (example).....	58
Fig. 78	Create template - detail view (example).....	59
Fig. 79	Add existing category	60
Fig. 80	Add category	60
Fig. 81	Remove category assignment (example).....	60
Fig. 82	Create new category	61
Fig. 83	Create new category	61

Fig. 84	Create new category	61
Fig. 85	Delete category	62
Fig. 86	Delete category	62
Fig. 87	Create or edit specific quality alarm	63
Fig. 88	Specific quality alarm - define details	64
Fig. 89	Specific quality alarms - time settings	65
Fig. 90	Specific quality alarm - notifications	66
Fig. 91	Specific quality alarm - registered users (example)	66
Fig. 92	Specific quality alarm - select registered users (example)	67
Fig. 93	Specific quality alarm - edit registered users (example)	67
Fig. 94	Specific quality alarm - configure type of notification (example)	67
Fig. 95	Specific quality alarm - remove registered user (example)	68
Fig. 96	Specific quality alarm - add unregistered users	68
Fig. 97	Specific quality alarm - unregistered users (example)	68
Fig. 98	Specific quality alarm - edit unregistered users (example)	68
Fig. 99	Specific quality alarm - delete unregistered users (example)	69
Fig. 100	Specific quality alarm - assign agents	69
Fig. 101	Agents	70
Fig. 102	Add agents from organization structure	70
Fig. 103	Agents (example)	70
Fig. 104	Add own agents	71
Fig. 105	Remove agent assignment	71
Fig. 106	Delete specific quality alarm	71

List of tables

Glossary

PBX

Private Branch Exchange

URL

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