

Portal



User manual

3/24/2020

Product line neo, version 6.x

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

EVOIPneo

EVOLUTIONneo / XXL / eco

INSPIRATIONneo

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

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2 Introduction

The application Portal is the central interface of the product line neo. The Portal allows opening the different applications of the product line neo, checking your personal notifications, and creating personal overview pages about different information.

The application consists of the following modules:

- Overview module
Creating personal overview pages. These overview pages can contain different information.
See [chapter "Overview module", p. 23](#).
- Applications module
Starting different applications.
See [chapter "Applications module", p. 42](#).
- Notifications module
Overview of received notifications.
See [chapter "Notifications module", p. 43](#).

3 Licenses

3 Licenses

You do not need additional licenses to use the application Portal.

4 Start application

Start the browser and enter the [URL](#) of the application server in the address bar.
After you have entered the [URL](#), the following login screen is displayed.

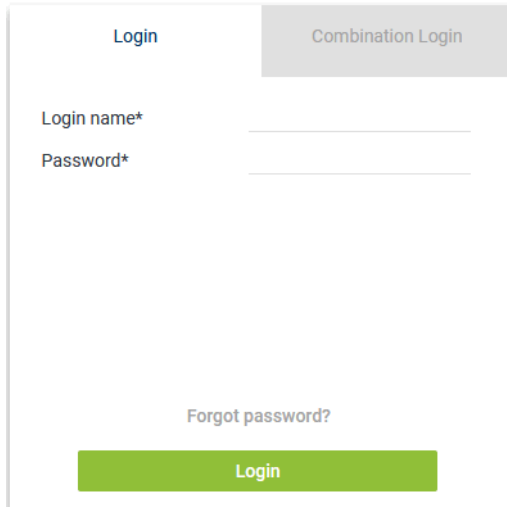
The screenshot shows a login window with two tabs: 'Login' (active) and 'Combination Login'. Under the 'Login' tab, there are two input fields: 'Login name*' and 'Password*'. Below these fields is a link that says 'Forgot password?'. At the bottom of the form is a green button labeled 'Login'.

Fig. 1: Login window

In general, there are the following login options:

- Single login = normal user login (see [chapter "Single login", p. 8](#))
- Combination login (see [chapter "Combination login", p. 9](#))
- Superadmin login (see [chapter "Superadmin login", p. 10](#))



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

4.1 Single login

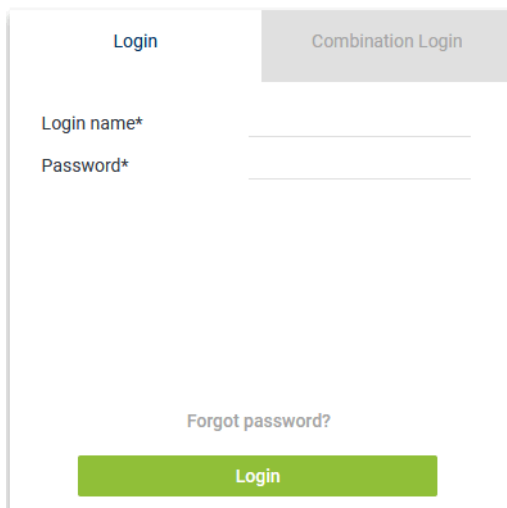
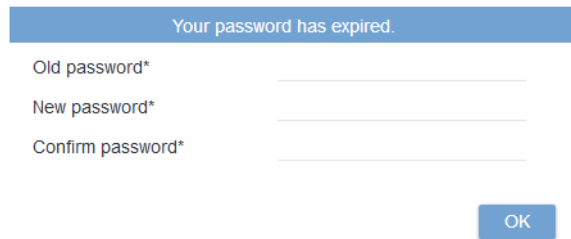
This screenshot is identical to the one in Fig. 1, showing the 'Login' window with input fields for 'Login name*' and 'Password*', a 'Forgot password?' link, and a green 'Login' button.

Fig. 2: Single login

1. Enter your user name and the password.
 2. Click on the button -> *Login*.
- ⇒ The welcome screen of the application appears.

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



Your password has expired.

Old password*

New password*

Confirm password*

OK

Fig. 3: Your password has expired

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

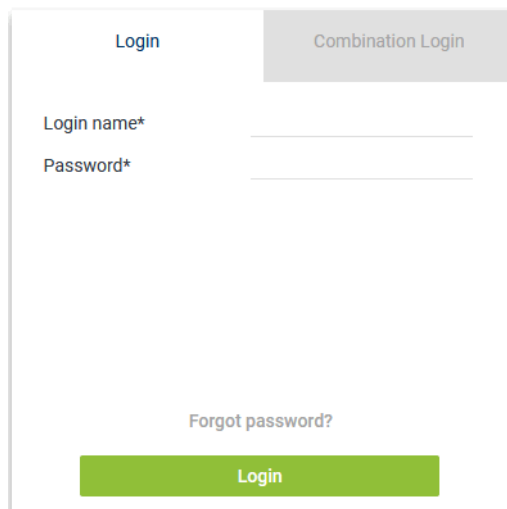
4.2

Combination login

For safety reasons, it may be sensible to assign a combination user to a user.

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

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



Login Combination Login

Login name*

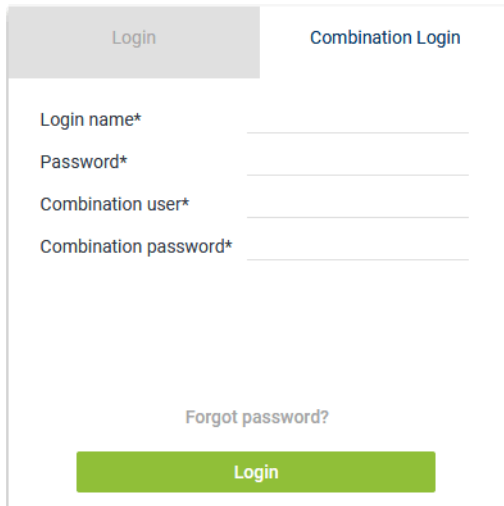
Password*

Forgot password?

Login

Fig. 4: Login

2. The window *Combination Login* appears.



The image shows a web form for 'Combination Login'. It has two tabs: 'Login' (selected) and 'Combination Login'. The form contains four input fields: 'Login name*', 'Password*', 'Combination user*', and 'Combination password*'. Below these fields is a link 'Forgot password?'. At the bottom is a green 'Login' button.

Fig. 5: Combination login

3. Enter your user name and your password as well as the user name and password of your combination user.

4. Click on the button -> *Login*.

⇒ The welcome screen of the application appears.

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

4.3

Superadmin login



Superadmin rights are only available in a Cloud environment and have to be activated when needed.

To access applications from a computer via the web as a superadmin, there are the following login possibilities:

Logging in to the system of a certain tenant:

1. Start the browser and enter the following URL in the address bar:
`https://<System-IP>/<Application>/index.jsf?tenantName=<nameOfTenant>`
2. Replace the parameter<System-IP> in the URL with the IP address of the system.
3. Replace the parameter<Application> in the URL with the *SystemConfiguration*, *System-Monitoring* or *Portal* depending on which application you would like to use.
4. Replace the parameter<nameOfTenant> in the URL with the name of the tenant.
5. Press the [Enter] key.
⇒ The login screen appears.
6. Enter your user name and the password in the login screen.
7. Click on the button *Login*.
⇒ The main window of the application appears.

Logging in after selecting a tenant from a list of available tenants:

1. Start the browser and enter the following URL in the address bar:
`https://<System-IP>/<Application>/index.jsf?showTenantSelection=true`
2. Replace the parameter<System-IP> in the URL with the IP address of the system.
3. Replace the parameter<Application> in the URL with the *SystemConfiguration*, *System-Monitoring* or *Portal* depending on which application you would like to use.
4. Press the [Enter] key.

- ⇒ The login screen appears.
- 5. Enter your user name and the password in the login screen.
- 6. Select the tenant name from the drop-down list.
- 7. Click on the button *Login*.
 - ⇒ The main window of the application appears.

Logging in to the system of a certain tenant:

1. Start the browser and enter the following URL in the address bar:
`https://<System-IP>/<Application>/index.jsf?tenantName=<nameOfTenant>&show-TenantSelection=true`
2. Replace the parameter<System-IP> in the URL with the IP address of the system.
3. Replace the parameter<Application> in the URL with the *SystemConfiguration*, *System-Monitoring* or *Portal* depending on which application you would like to use.
4. Replace the parameter<nameOfTenant> in the URL with the name of the tenant.
5. Press the [Enter] key.
 - ⇒ The login screen appears.
6. Enter your user name and the password in the login screen.
7. Click on the button *Login*.
 - ⇒ The main window of the application appears.

Directly logging in to the system of a tenant that the superadmin had been logged in to previously:

1. Start the browser and enter the following URL in the address bar:
`https://<System-IP>/<Application>/index.jsf?userName=<nameOfUser>&userPassword=<passwordOfUser>`
2. Replace the parameter<System-IP> in the URL with the IP address of the system.
3. Replace the parameter<Application> in the URL with the *SystemConfiguration*, *System-Monitoring* or *Portal* depending on which application you would like to use.
4. Replace the parameter<nameOfUser> in the URL with the user name.
5. Replace the parameter<passwordOfUser> in the URL with the password.
6. Press the [Enter] key.
 - ⇒ The main window of the application appears.

Directly logging in to the system of a certain tenant:

1. Start the browser and enter the following URL in the address bar:
`https://<System-IP>/<Application>/index.jsf?userName=<nameOfUser>&userPassword=<passwordOfUser>&tenantName=<nameOfTenant>`
2. Replace the parameter<System-IP> in the URL with the IP address of the system.
3. Replace the parameter<Application> in the URL with the *SystemConfiguration*, *System-Monitoring* or *Portal* depending on which application you would like to use.
4. Replace the parameter<nameOfUser> in the URL with the user name.
5. Replace the parameter<passwordOfUser> in the URL with the password.
6. Replace the parameter<nameOfTenant> in the URL with the name of the tenant.
7. Press the [Enter] key.
 - ⇒ The main window of the application appears.

Logging in to the system of a certain tenant with a predefined user name and password:

1. Start the browser and enter the following URL in the address bar:
`https://<System-IP>/<Application>/index.jsf?userName=<nameOfUser>&userPassword=<passwordOfUser>&tenantName=<nameOfTenant>&showTenantSelection=true`
2. Replace the parameter `<System-IP>` in the URL with the IP address of the system.
3. Replace the parameter `<Application>` in the URL with the *SystemConfiguration*, *System-Monitoring* or *Portal* depending on which application you would like to use.
4. Replace the parameter `<nameOfUser>` in the URL with the user name.
5. Replace the parameter `<passwordOfUser>` in the URL with the password.
6. Replace the parameter `<nameOfTenant>` in the URL with the name of the tenant.
7. Press the [Enter] key.
 - ⇒ The login screen appears.
 User name, password, and tenant name have already been entered in the login screen.
8. Click on the button *Login*.
 - ⇒ The main window of the application appears.

Login for last connected tenant (single login):

1. Start the browser and enter the [URL](#) of the application server in the address bar.
2. Press the [Enter] key.
 - ⇒ The login screen appears.
3. Enter your user name and the password in the login screen.
4. Click on the button *Login*.
 - ⇒ The main window of the application appears.



A combination login is not possible for superadmins.

4.4
Request new password

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

1. Click on the text *Forgot password?*

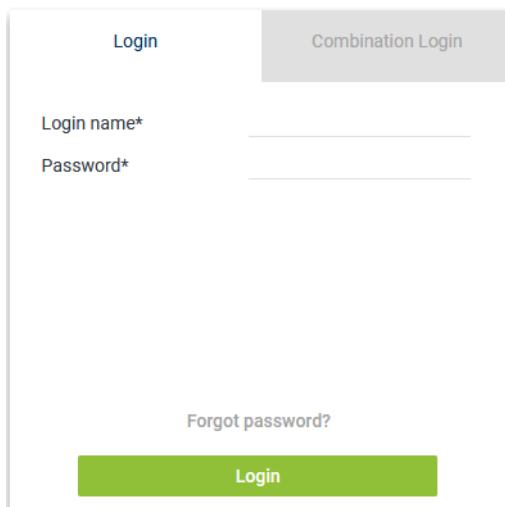


Fig. 6: Login window

2. The window *Forgot password?* appears.

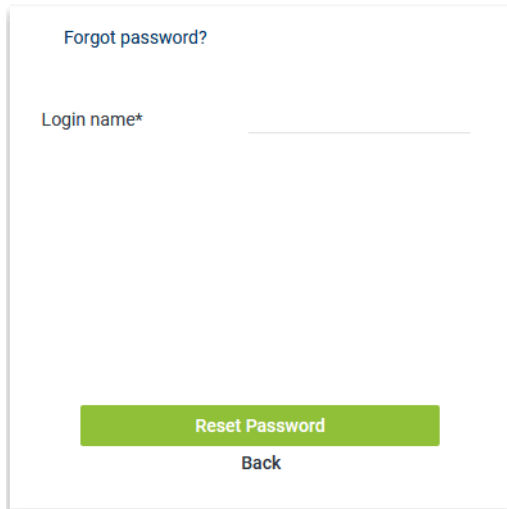


Fig. 7: Request password

3. Enter your user name.
4. Click on the button -> *Reset Password*.
⇒ You will receive an e-mail containing your new password.



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

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

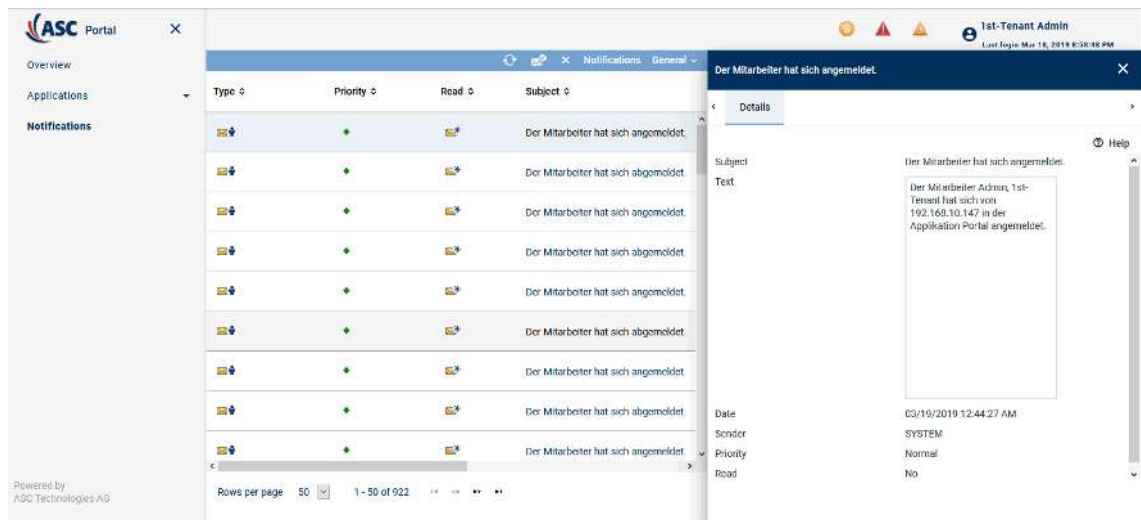









Fig. 8: Welcome screen


Navigation bar		Contains the individual menu items (function modules), see chapter "Navigation bar", p. 15.
Main view		Contains an overview of the most important information about the selected module.
Detail view		Contains detailed information about as well as functions and setting options of the selected element of the main view. The detail view is only available in the Notifications module.
	(Collapse)	Icon which allows collapsing or reducing the viewing areas.
	(Expand)	Icon which allows expanding or opening the viewing areas.
Toolbar		Contains icons and menu items with functions for the elements in the main view. It depends on the selected module which icons and menu items are displayed. The separate icons and menu items are explained in the descriptions of the respective modules.
General	General Help	By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened. See chapter "Call up online help", p. 19.
	Module Help	By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened. See chapter "Call up online help", p. 19.
	Shows the date when your password expires. To hide the icon, click on the button <i>Okay</i> .	
	(Your latest login has failed. Please use the correct password.) Shows that the latest attempt to log in to the application was not successful. Click on the warning icon to delete the error message. Always use the correct password to log in to the application.	

 (Your last logoff was not correct. Please use the logoff button.)	Indicated that you have not logged off correctly when leaving the application the last time. Click on the warning icon to delete the error message. Always use the logoff icon to log off from the application.
 (Logged in as).	Change Password Menu item which allows changing your password, see chapter "Change password", p. 18.
	Navigation Bar Menu item which allows changing the way the navigation bar is displayed, see chapter "Change navigation bar", p. 19.
	Language Menu item which allows selecting the language of the user interface, see chapter "Change language", p. 16.
	Resource String View Menu item which allows changing between the resource string view and the default view. This view is only available ASC-internally.
	Info Menu item which allows calling up information about the version of the ASC software, see chapter "Call up info", p. 17.
	Tenant Selection Icon which allows changing the tenant, see chapter "Change tenant", p. 18. Only a user with superadmin rights can see this icon.
	Logoff Menu item which allows logging off from the application.
User	Name of the logged-in user
Last login date	Shows the date of the last login.
	Buttons which allow browsing the pages of the main view. (This function is not available in all modules.)



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



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

5.1

Navigation bar

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

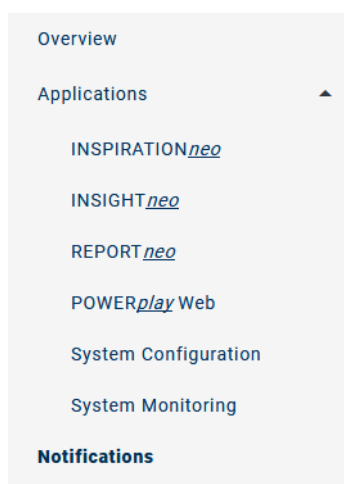




Fig. 9: Navigation bar (example)

Modules which contain sub-menus are marked with an arrow icon. Click on the arrow icon to display or hide the sub-menus of a module.

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

Short description of the modules

Module name	Sub-menus	Description
Overview		<ul style="list-style-type: none"> Creation and administration of overviews which depict different information in a compact way.
Applications		<ul style="list-style-type: none"> Direct links to other applications.
	INSPIRATIONneo	<ul style="list-style-type: none"> Link to the application INSPIRATIONneo.
	INSIGHTneo	<ul style="list-style-type: none"> Link to the application INSIGHTneo.
	REPORTneo	<ul style="list-style-type: none"> Link to the application REPORTneo.
	POWERplay Web	<ul style="list-style-type: none"> Link to the application POWERplay Web.
	System Configuration	<ul style="list-style-type: none"> Link to the application System Configuration.
	System Monitoring	<ul style="list-style-type: none"> Link to the application System Monitoring.
Notifications		<ul style="list-style-type: none"> Display of all received notifications.

Tab. 1: Module descriptions



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

5.2

Change language



- Click on the menu item  *Logged in as* > *Language* in the top right corner of the user interface.
 - ⇒ The following window appears:






Fig. 10: Change language

- Select the language from the drop-down list. Only languages that you have installed during the installation can be selected.
 - ⇒ The texts of the user interface are displayed in the selected language.


5.3 Call up info

- Click on the menu item  *Logged in as > Info* in the top right corner of the user interface.
 - ⇒ The window *Installed Product Versions* appears. It contains information about the version of the *neo* software.

The following information is displayed:

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

Tab. 2: Information

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

Additional Information Close

Fig. 11: Installed Product Versions

- To obtain additional information about the system, click on the button *Additional Information* in the bottom right corner of the window.
 - ⇒ The window *Additional Information* appears. It contains information about the license.



Additional Information


License Information

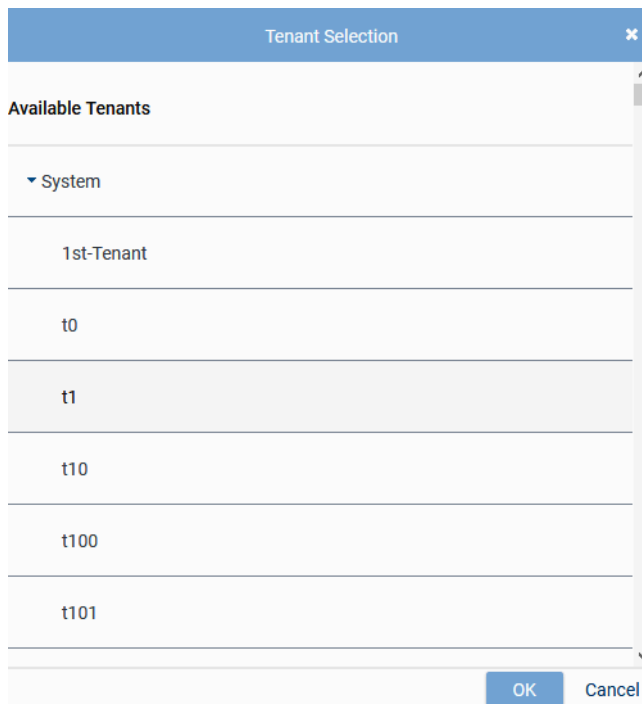
System ID:	2322891
Order ID:	66666666

Close

Fig. 12: Additional Information

5.4 Change tenant

- Click on the menu item  (Logged in as) > Change Tenant in the top right corner of the user interface.
⇒ The following window appears:



Tenant Selection

Available Tenants

▼ System

1st-Tenant
t0
t1
t10
t100
t101

OK Cancel


Fig. 13: Tenant selection

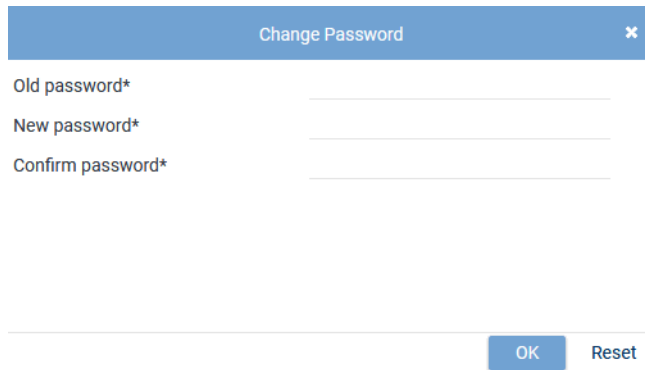
- Select one of the available tenants from the list.
- Click on the button OK.
⇒ The tenant is changed and displayed in the top right corner of the user interface.

5.5 Change password




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

- Click on the menu item  Logged in as > Change Password in the top right corner of the user interface.
⇒ The following window appears:




A dialog box titled "Change Password" with a close button (X) in the top right corner. It contains three input fields labeled "Old password*", "New password*", and "Confirm password*". At the bottom, there are two buttons: "OK" and "Reset".


Fig. 14: Change password

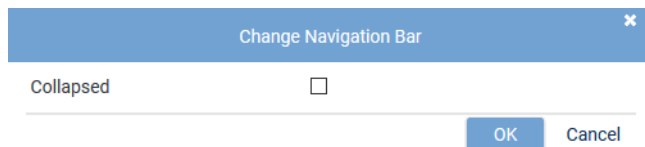
2. Enter your old password.
3. Enter your new password and confirm it.
4. To save the change of the password, click on the button **OK**.
To delete the entries without saving them, click on the button **Reset**.
To cancel the change of the password, click on the icon  in the top right corner of the window.

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

5.6 Change navigation bar

1. Click on the menu item  (*Logged in as*) > *Navigation Bar* in the top right corner of the user interface.
⇒ The window *Change Navigation Bar* appears.
2. Activate the check box to collapse the navigation bar.
⇒ The setting is saved permanently. Upon logging in the next time, the application is opened with this settings.

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




A dialog box titled "Change Navigation Bar" with a close button (X) in the top right corner. It contains a label "Collapsed" followed by an unchecked checkbox. At the bottom, there are two buttons: "OK" and "Cancel".

Fig. 15: Change navigation bar

5.7 Call up online help

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

Menu / Button	Menu item	Location	Result
<i>General</i>	<i>General Help</i>	Toolbar of the main view	By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened.
	<i>Module Help</i>	Toolbar of the main view	By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened.

Menu / Button	Menu item	Location	Result
 Help		Detail view / Additional window	A topic-specific help opens referring to the tab or the additional window you are currently viewing.

Tab. 3: Call up online help

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

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

5.8 Change sort sequence

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

	No sorting
	Descending sort sequence
	Ascending sort sequence

Tab. 4: Main view - change sort sequence

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

5.9 Filter table view

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

Employee Number ↕	First Name ↕	Last Name ↕	Login Name ↕	Date of Entry ↕
1000	10.	Agent		
900	9.	Agent		

Fig. 16: Filter table view (example)

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

Example:

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

Agents ▾ General ▾				
Employee Number ▾	First Name ▾	Last Name ▾	Login Name ▾	Date of Entry ▾
10				
1000	10.	Agent		
100	1.	Agent		

Rows per page 50 ▾ 1 - 2 of 2

Fig. 17: Filter table view - 1 criterion

- If you would like to filter the content of several columns at the same time, enter the character string you would like to filter by in all the filter fields of these columns.

⇒ The table only displays the entries which match all entered filter criteria.

Example:

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

Agents ▾ General ▾				
Employee Number ▾	First Name ▾	Last Name ▾	Login Name ▾	Date of Entry ▾
10		A		
1000	10.	Agent		
100	1.	Agent		

Rows per page 50 ▾ 1 - 2 of 2

Fig. 18: Filter table view - several criteria

5.10 Text entry fields

There are 2 different fields for text entries:

Single-row entry fields

Maximum text length: 255 characters

Login name

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

Multi-row entry fields

Maximum text length: 1500 characters

Comment

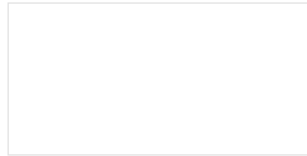
A rectangular text input field with a thin grey border, intended for multi-row text entry.

Fig. 20: Multi-row entry field (example)

6

Overview module

In the Overview module, different information is displayed in [widgets](#). A pool containing the available [widgets](#) allows users to create their own overview page which may consist of several tabs.

In general, the following [widgets](#) are available:

- Agents
See [chapter "Agent widget", p. 25.](#)
- Dashboard
See [chapter "Dashboard widget", p. 29.](#)
- Extension
See [chapter "Extension widget", p. 30.](#)
- Notifications
See [chapter "Notification widget", p. 34.](#)
- Recording
See [chapter "Recording widget", p. 35.](#)
- Report
See [chapter "Report widget", p. 39.](#)

It depends on your function rights and the available licenses which of the described [widgets](#) are available.

The layout of the [widgets](#) within a tab can be changed by means of drag and drop.

You can change between the individual tabs by clicking on the name of tabs that you would like to display.

The toolbar allows administrating and saving your personal overview page (see [chapter "Toolbar", p. 23](#)).



The following adjustments are not saved effectively before saving the current view by clicking on the menu item *Save View*:

- Newly created, empty tabs
- Deleted tabs
- Changed layout of the [widgets](#)

6.1

Icons and toolbars

6.1.1

Toolbar

The toolbar offers the following functions:

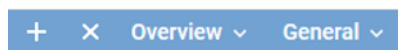









Fig. 21: Overview module - toolbar

+	Create	<p>Adds a new widget or a new tab.</p> <p>It depends on the function rights and licenses which widgets are available.</p> <p>See chapter "Add widget", p. 25 or chapter "Add tab", p. 24.</p>
---	---------------	---


	<i>Delete tab</i>	Deletes the current tab. See chapter "Delete tab", p. 25 .
<i>Overview</i>	<i>Save Complete View</i>	Saves the current view as default view of the user.
<i>General</i>	<i>General Help</i>	By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened. See Call up online help.
	<i>Module Help</i>	By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened. See Call up online help.

6.1.2 Icons end devices status

	No conversation takes place on the end device.
	A conversation takes place on the end device. The conversation is not being recorded.
	A conversation takes place on the end device. The conversation is being recorded. The recording will be saved after the conversation.
	A conversation takes place on the end device. The conversation is being recorded. The recording will be discarded after the conversation.
	A conversation takes place on the end device. The conversation is being recorded. The recording has been muted. The recording will be saved after the conversation.
	A conversation takes place on the end device. The conversation is being recorded. The recording has been muted. The recording will be discarded after the conversation.

Tab. 5: End devices status

6.2 Add tab

1. Click on the icon  (*Create*) in the toolbar.
2. Select the menu item *Tab*.
3. Enter a name for the new tab.

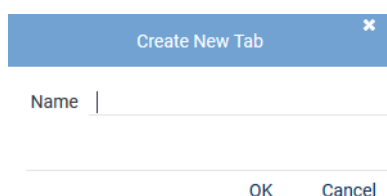


Fig. 22: Add tab


4. Click on the button *OK*.
 - ⇒ A new, empty tab is created and opened.
 - ⇒ The name of the tab is displayed in the header of the overview site.



Empty tabs are not saved automatically and will thus no longer be available after having logged off from the application. To save an empty tab, click on the menu item *Dashboards > Save View* in the toolbar. Once the tab has been edited, e. g. by creating a widget for it or deleting an existing widget, the view is applied automatically.


6.3

Delete tab

1. Open the tab you would like to delete. To do so, click on the name of the tab in the header of the overview site.
2. Click on the icon  (*Delete tab*) in the toolbar.
3. To really delete the tab, confirm the security prompt and save the current view by clicking on the menu item *Dashboards > Save View* in the toolbar.

6.4

Add widget

1. Click on the icon  (*Create*) in the toolbar.
2. Select the [widget](#) type you would like to add to your overview page.
3. Set the respective values in the configuration window of the [widget](#).




The adjustable parameters vary from [widget](#) to [widget](#). For a description of the individual configuration windows, see the description of the respective [widget](#).

4. Click on the button *Save* in the configuration window.
 - ⇒ The new [widget](#) is inserted at the bottom of your overview page.
- The layout of the [widgets](#) within a tab can be changed by means of drag and drop.

6.5

Edit widget settings

1. Click on the icon  (*Settings*) in the title bar of the [widget](#).
2. Select the menu item *Settings*.
 - ⇒ The configuration window of the [widget](#) opens.
3. Make the respective changes.




The adjustable parameters vary from [widget](#) to [widget](#). For a description of the individual configuration windows, see the description of the respective [widget](#).

4. To apply the changes, click on the button *Apply*.
To discard the changes and close the window, click on the button *Cancel*.

6.6

Delete widget

1. Click on the icon  (*Settings*) in the title bar of the [widget](#).
2. Select the menu item *Delete Widget*.
3. To really delete the [widget](#), confirm the security prompt.

6.7

Agent widget

The agent [widget](#) offers the possibility to display the conversation status of agents. You can display details of the current conversations of the agents either in a new [widget](#) or in a dialog window (see [chapter "Detail view of conversations", p. 40](#)). Additionally, you can follow conversations via *Monitoring*.



You can only see information about agents on whose data you have access rights.



The function *Monitoring* is currently not available.

The agent **widget** offers 2 display modes:

- **Grid view**


You see the names of the individual agents and their current conversation status.

See [chapter "Grid view Agent Widget", p. 26](#).

- **Static view**

You see a list of possible conversation status and how many agents are currently in the particular conversation status.

See [chapter "Static view agent widget", p. 27](#).

Click on the icon  (*Change view*) in the toolbar of the **widget** to change the display mode.

6.7.1

Grid view Agent Widget

You see the names of the individual agents and their current conversation status (see [chapter "Icons end devices status", p. 24](#)).

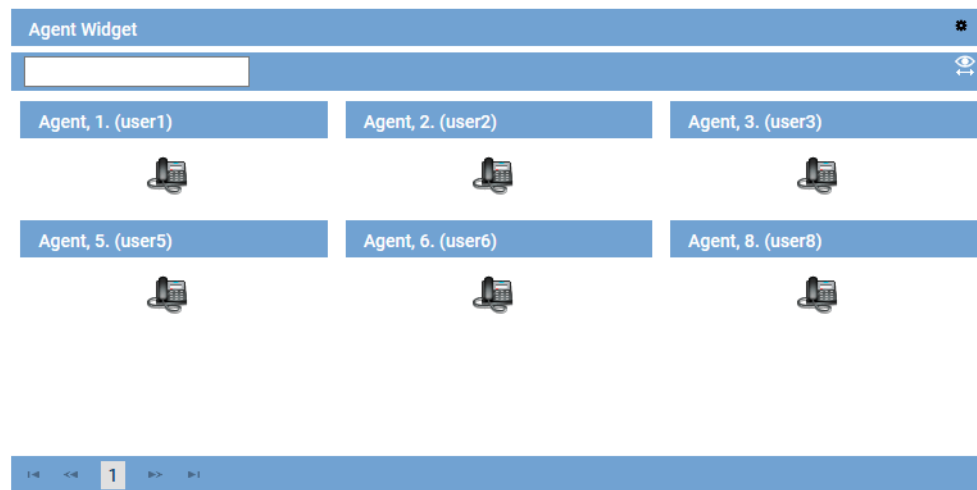


Fig. 23: Grid view Agent Widget

1. Click on the name of the agent to display details about an agent and the current conversation.
 - ⇒ A dialog window appears which prompts you to decide whether you would like to display the details in a new **widget** or in a dialog window.



How should the agent be displayed?

Widget **Dialog** **Remove** **Cancel**

Fig. 24: Prompt - display agent

2. If you would like the details to be displayed in a new **widget**, click of the button *Widget*. If you would like the details to be displayed in a dialog window, click of the button *Dialog*.
 - ⇒ The details are displayed according to your selection:
 - If you have selected a **widget**, this **widget** is inserted at the bottom of your overview site.
 - If you have selected a dialog window, this window is displayed in the foreground.
3. To hide an agent from the display, click on the name of the agent and in the following prompt on the button *Remove*.
 - ⇒ The agent is hidden from the display. The agent is displayed again automatically as soon as he is starting a new conversation.

6.7.1.1 Search function

The header of the [widget](#) contains a search field which allows filtering the display:

1. Enter the last name of the agent you would like to search for.
NOTICE! Case-sensitive!
 2. Confirm the entry with the [Enter] key or wait until the [widget](#) is refreshed automatically.
- ⇒ Only the agent you have searched for is displayed in the [widget](#).



To return to the agent overview, delete the entry in the search field and confirm with the [Enter] key or wait for the cyclic update.

6.7.2 Static view agent widget

You see a list of possible conversation status and how many agents are currently in the particular conversation status.








Agent Widget	
Status	
	6
	0
	0
	0
	0

Fig. 25: Static view agent widget

1. Click on the corresponding icon to display details of a conversation status.
⇒ A window displaying an overview of all end devices or agents who are currently in this conversation status appears.


Agent Status Overview			Agent, 1.	
PBX name ↕	Extension ↕	Agent ↕	Details	
SIP	user1	Agent, 1.	PBX name	SIP
SIP	user2	Agent, 2.	Phone Name	
SIP	user3	Agent, 3.	Phone type	
SIP	user5	Agent, 5.	IP	
SIP	user6	Agent, 6.	MAC address	
SIP	user8	Agent, 8.	Computer name	
			Agent	1., Agent
			Status	 

Rows per page 50 1 - 6 of 6

Open as Widget Close

Fig. 26: Status - overview


- Click on the respective line in the displayed list to receive details of an agent or an end device.
 - ⇒ The details are displayed in the detail view on the right side in the window.

Agent	Name of the agent who is in conversation.
Extension	Extension of the end device via which the conversation is running.
PBX name	Name of the PBX to which the end device has been connected.
Phone name	Name of the phone via which the conversation is running.
Phone type	Type of the phone via which the conversation is running.
IP address	IP address of the end device via which the conversation is running.
MAC address	MAC address of the end device via which the conversation is running.
Computer name	Name of the computer on which the recording is running.
Status	<p>Current status of the conversation.</p> <p>The status is displayed by means of an icon. See chapter "Icons end devices status", p. 24.</p> <p>By clicking on the icon  (<i>Monitoring</i>) you can activate that the conversation is monitored. NOTICE! This function is currently not available.</p>

Tab. 6: Conversation details

- If you would like the details to be displayed in a new **widget**, click of the button *Open as widget*.
 - ⇒ The window with the status overview is closed.
 - ⇒ The new widget is inserted at the bottom of your overview page.
- If you would like to close the window, click on the button *Close*.

6.7.3 Configure agent widget

- Click on the icon  (*Settings*) in the title bar of the **widget**.
- Select the menu item *Settings*.
- Adjust the respective settings.

Configuration

Name*	Agent Widget		
Refresh cyclically	<input type="checkbox"/>		
Refresh	10	Second(s)	
Default view	Statistics View ▼		

[Save](#) [Cancel](#)

Fig. 27: Configure agent widget

Name	Name of the widget. The name is displayed in the title bar of the widget.
Refresh cyclically	Select whether the information displayed in the widget is supposed to be refreshed cyclically. <input checked="" type="checkbox"/> = Widget is refreshed. <input type="checkbox"/> = Widget is not refreshed.
Refresh	Refresh interval in which the widget will be refreshed cyclically if the option <i>Refresh cyclically</i> has been activated. Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.
Default view	View which displays the information in the widget. Select the view from the drop-down list. <i>Grid view</i> , see chapter "Grid view Agent Widget", p. 26 . <i>Static view</i> , see chapter "Static view agent widget", p. 27 .

4. To apply the settings, click on the button *Apply*.
To discard the settings, click on the button *Cancel*.

6.8 Dashboard widget

The Dashboard [Widget](#) offers the possibility to display report results in graphical form.

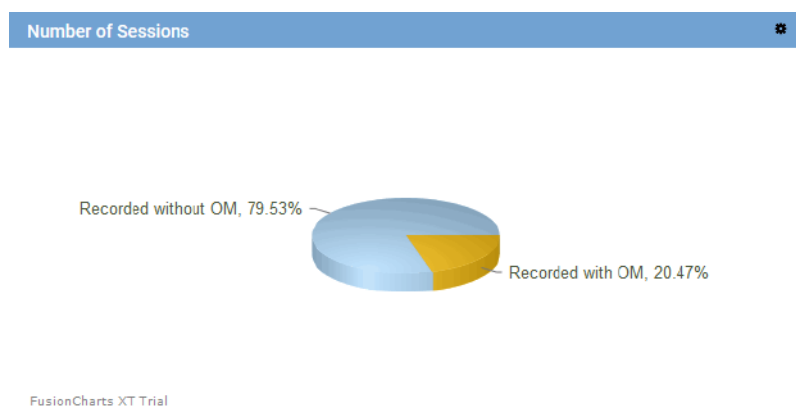



Fig. 28: Dashboard widget

Report results which are to be displayed in a Dashboard [Widget](#) have to be available in the Report Instances module as reports instances of the type *dashboard template*.

Depending on the definition in the report instance, the information is displayed in different types of diagrams.

6.8.1 Configure dashboard widget

1. Click on the icon  (*Settings*) in the title bar of the [widget](#).
2. Select the menu item *Settings*.
3. Adjust the respective settings.

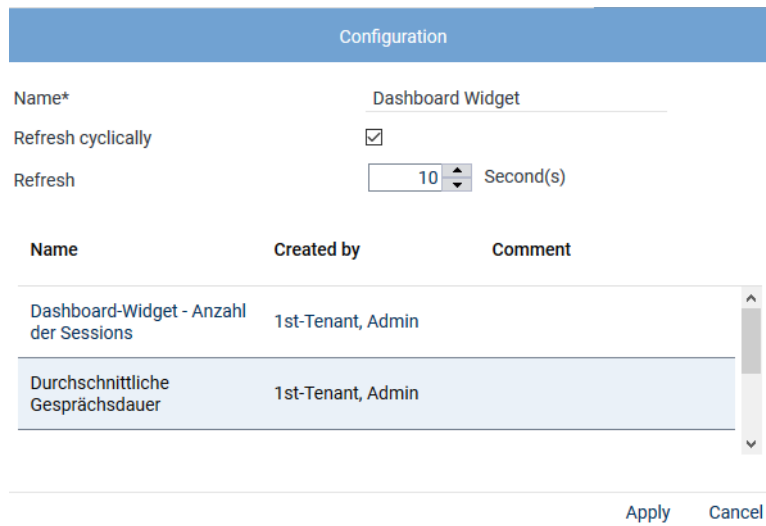


Fig. 29: Configure dashboard widget

Name	Name of the widget . The name is displayed in the title bar of the widget.
Refresh cyclically	Select whether the information displayed in the widget is supposed to be refreshed cyclically. <input checked="" type="checkbox"/> = Widget is refreshed. <input type="checkbox"/> = Widget is not refreshed.
Refresh	Refresh interval in which the widget will be refreshed cyclically if the option <i>Refresh cyclically</i> has been activated. Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.
Table	The table displays all available report instances. Select the report instance you would like to display as dashboard by clicking on the entry in the table.

4. To apply the settings, click on the button *Apply*.
To discard the settings, click on the button *Cancel*.

6.9 Extension widget

The extension [widget](#) offers the possibility to display the conversation status of end devices. You can display details of the current conversations either in a new [widget](#) or in a dialog window (see [chapter "Detail view of conversations"](#), p. 40). Additionally, you can follow conversations via *Monitoring*.



You can only see information about end devices which have been assigned to agents for whose data you have access rights.



The function *Monitoring* is currently not available.

The extension [widget](#) offers 2 display modes:

- **Grid view**


You see the numbers of the individual end devices and their current conversation status.

See [chapter "Grid view extension widget", p. 31.](#)

- **Static view**

You see a list of possible conversation statuses and how many end devices are currently in the respective status.

See [chapter "Static view extension widget", p. 32.](#)

Click on the icon  (*Change view*) in the toolbar of the [widget](#) to change the display mode.

6.9.1 Grid view extension widget

You see the numbers of the individual end devices and their current conversation status (see [chapter "Icons end devices status", p. 24](#)).

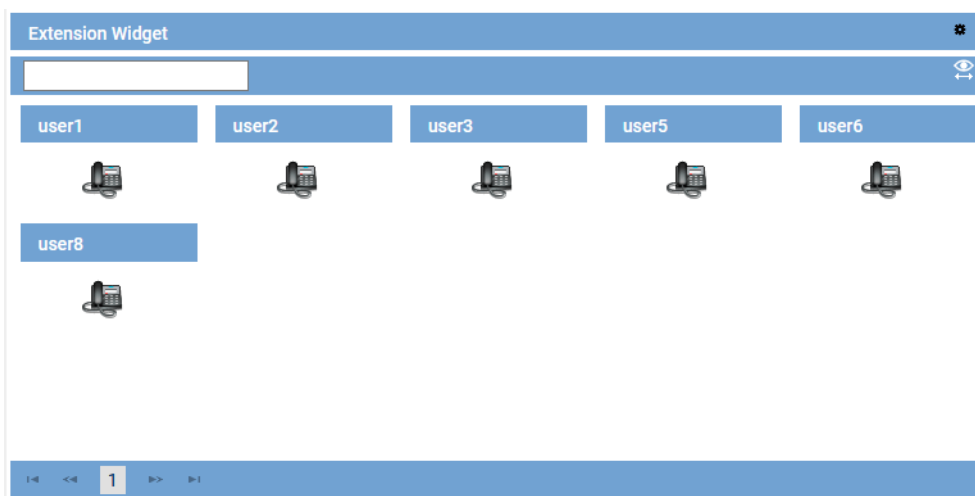


Fig. 30: Grid view extension widget

1. To display details of an end device and the current conversation, click on the number of the end device.
 - ⇒ A dialog window appears which prompts you to decide whether you would like to display the details in a new [widget](#) or in a dialog window.



How should the extension be displayed?

[Widget](#) [Dialog](#) [Remove](#) [Cancel](#)

Fig. 31: Prompt - display extension

2. If you would like the details to be displayed in a new [widget](#), click of the button *Widget*. If you would like the details to be displayed in a dialog window, click of the button *Dialog*.
 - ⇒ The details are displayed according to your selection:
 - If you have selected a [widget](#), this [widget](#) is inserted at the bottom of your overview site.
 - If you have selected a dialog window, this window is displayed in the foreground.
3. To hide an end device from the display, click on the number of the end device and in the following prompt on the button *Remove*.
 - ⇒ The end device is hidden from the display. The end device is displayed again automatically as soon as it is used for a new conversation.

6.9.1.1 Search function

The header of the **widget** contains a search field which allows filtering the display:

1. Enter the extension you would like to search for.
 2. Confirm the entry with the [Enter] key or wait until the **widget** is refreshed automatically.
- ⇒ Only the extension you have searched for is displayed in the **widget**.



To return to the extension overview, delete the entry in the search field and confirm with the [Enter] key or wait for the cyclic update.

6.9.2 Static view extension widget

You see a list of possible conversation statuses and how many end devices are currently in the respective status.

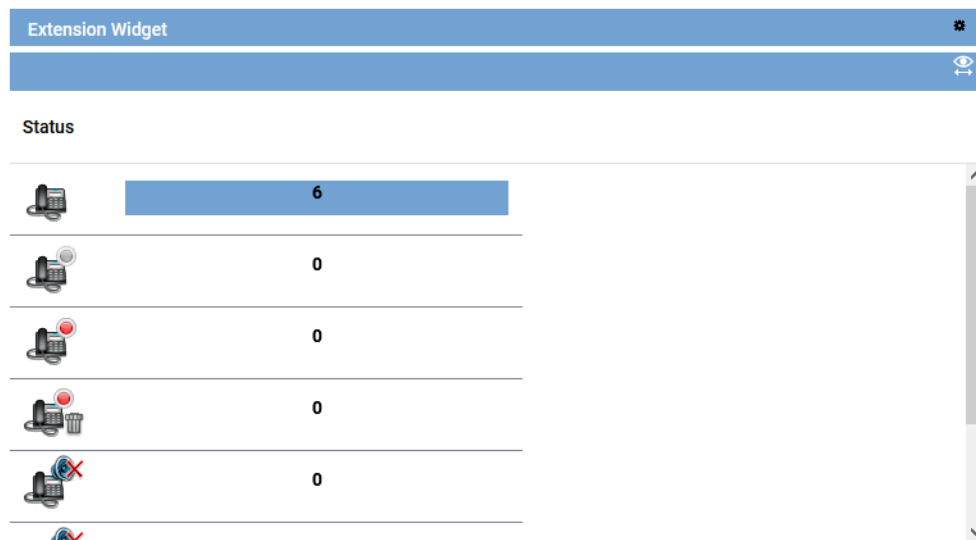


Fig. 32: Static view extension widget

1. Click on the corresponding icon to display details of a conversation status.
 - ⇒ A window displaying an overview of all end devices or agents who are currently in this conversation status appears.

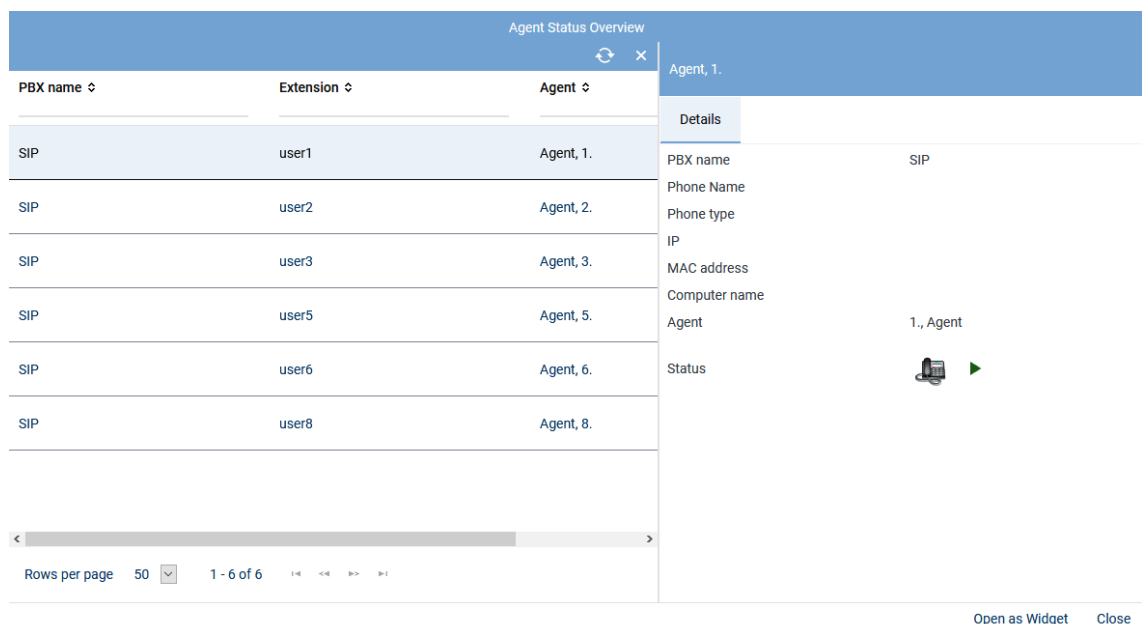



Fig. 33: Status - overview


2. Click on the respective line in the displayed list to receive details of an agent or an end device.
 - ⇒ The details are displayed in the detail view on the right side in the window.

<i>Agent</i>	Name of the agent who is in conversation.
<i>Extension</i>	Extension of the end device via which the conversation is running.
<i>PBX name</i>	Name of the PBX to which the end device has been connected.
<i>Phone name</i>	Name of the phone via which the conversation is running.
<i>Phone type</i>	Type of the phone via which the conversation is running.
<i>IP address</i>	IP address of the end device via which the conversation is running.
<i>MAC address</i>	MAC address of the end device via which the conversation is running.
<i>Computer name</i>	Name of the computer on which the recording is running.
<i>Status</i>	<p>Current status of the conversation.</p> <p>The status is displayed by means of an icon. See chapter "Icons end devices status", p. 24.</p> <p>By clicking on the icon  (<i>Monitoring</i>) you can activate that the conversation is monitored. NOTICE! This function is currently not available.</p>

Tab. 7: Conversation details

3. If you would like the details to be displayed in a new [widget](#), click of the button *Open as widget*.
 - ⇒ The window with the status overview is closed.
 - ⇒ The new widget is inserted at the bottom of your overview page.
4. If you would like to close the window, click on the button *Close*.

6.9.3 Configure extension widget

1. Click on the icon  (*Settings*) in the title bar of the [widget](#).
2. Select the menu item *Settings*.
3. Adjust the respective settings.

Configuration

Name*

Extension Widget

Refresh cyclically

☐

Refresh

Second(s)

Default view

Statistics View

v

[Save](#) [Cancel](#)

Fig. 34: Configure extension widget

<i>Name</i>	Name of the widget. The name is displayed in the title bar of the widget.
<i>Refresh cyclically</i>	<p>Select whether the information displayed in the widget is supposed to be refreshed cyclically.</p> <p><input checked="" type="checkbox"/> = Widget is refreshed.</p>

	☐ = Widget is not refreshed.
Refresh	<p>Refresh interval in which the widget will be refreshed cyclically if the option <i>Refresh cyclically</i> has been activated.</p> <p>Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.</p>
Default view	<p>View which displays the information in the widget.</p> <p>Select the view from the drop-down list.</p> <p><i>Grid view</i>, see chapter "Grid view extension widget", p. 31.</p> <p><i>Static view</i>, see chapter "Static view extension widget", p. 32.</p>

- To apply the settings, click on the button *Apply*.
To discard the settings, click on the button *Cancel*.

6.10

Notification widget

The Notification [Widget](#) allows viewing all notifications you have received.







Notification Widget			
Date ↕	Subject ↕	Read ↕	Text ↕
11/21/2018 7:44:47 AM	Der Mitarbeiter hat sich angemeldet.		Der Mitarbeiter Admin, 1st-Tenant hat sich von 192.168.10.68 in der Applikation INSIGHTneo angemeldet.
11/21/2018 7:25:49 AM	Der Mitarbeiter hat sich abgemeldet.		Der Mitarbeiter Admin, 1st-Tenant hat sich von 192.168.10.68 in der Applikation INSIGHTneo abgemeldet.
11/21/2018 6:55:31 AM	Der Mitarbeiter hat sich angemeldet.		Der Mitarbeiter Admin, 1st-Tenant hat sich von 192.168.10.147 in der Applikation Portal angemeldet.
Extension Widget			

Fig. 35: Notification widget


The following information is displayed:

Date	Date on which you received the notification.
Subject	Subject line of the notification.
Read	Shows whether the notification has already been read.  = unread notification  = read notification
Text	Complete content of the notification.

- To mark the notification as read, select the notification from the list.
- Click on the icon  (*Mark as read*) in the toolbar of the [widget](#).
⇒ The notification is marked as read.

6.10.1

Configure notification widget

- Click on the icon  (*Settings*) in the title bar of the [widget](#).
- Select the menu item *Settings*.

3. Adjust the respective settings.

Configuration

Name*	Notification Widget	
Refresh cyclically	<input type="checkbox"/>	
Refresh	<input style="width: 50px; text-align: center;" type="text" value="10"/> <input style="width: 20px; border: none; border-left: 1px solid #ccc; border-right: 1px solid #ccc; text-align: center; cursor: pointer;"/> <input style="width: 20px; border: none; border-left: 1px solid #ccc; border-right: 1px solid #ccc; text-align: center; cursor: pointer;"/>	Second(s)
Priority	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Very High High Normal Low </div>	
Only show unread	<input checked="" type="checkbox"/>	

[Save](#)
[Cancel](#)

Fig. 36: Configure notification widget

Name	Name of the widget. The name is displayed in the title bar of the widget.
Refresh cyclically	Select whether the information displayed in the widget is supposed to be refreshed cyclically. <input checked="" type="checkbox"/> = Widget is refreshed. <input type="checkbox"/> = Widget is not refreshed.
Refresh	Refresh interval in which the widget will be refreshed cyclically if the option <i>Refresh cyclically</i> has been activated. Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard. The unit of the entered value is seconds.
Priority	Select whether only notifications with certain priorities are supposed to be displayed. Select one or several entries from the list. To select several entries, click on the entries you would like to select while holding the [Ctrl] key down. If you do not select any priority, all notifications will be displayed regardless of their priority.
Show only unread notifications	Select whether only unread notifications are supposed to be displayed. <input checked="" type="checkbox"/> = Only unread notifications are displayed. <input type="checkbox"/> = All notifications are displayed.

4. To apply the settings, click on the button *Apply*.
 To discard the settings, click on the button *Cancel*.

6.11 Recording widget

The recording [widget](#) offers the possibility to display and export the statistic values of the recording compiled every hour.

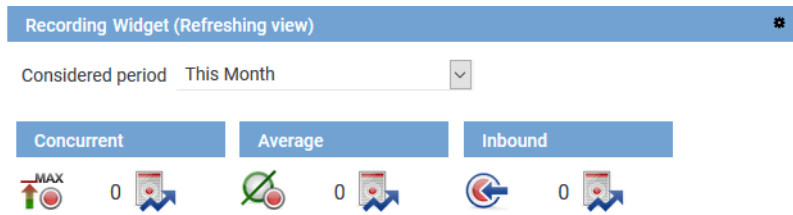


Fig. 37: Recording dashboard









To be able to see information in the recording [widget](#), the recording dashboard templates *Total number of calls*, *Average call duration*, and/or *Maximum number of concurrent calls* provided within the system must have been imported in the Report Templates module and the corresponding recording dashboard instances created and released in the Report Instances module.




For information about using the Report Templates module and the Report Instances module refer to the respective INSIGHT^{neo} user manuals.

Depending on the configuration of the [widget](#), the following information is displayed:

	Number of outgoing calls
	Number of incoming calls
	Total number of calls
	Maximum number of concurrent calls
	Average call duration in seconds
	Trend <ul style="list-style-type: none"> • Upward • Downward • Unchanged

6.11.1 Configure recording widget

Configuration of the widget

1. Click on the icon  (*Settings*) in the title bar of the [widget](#).
2. Select the menu item *Settings*.
3. Adjust the respective settings.

Configuration

Name*

Recording Widget

Refresh cyclically

☒

Refresh

Second(s)


[Apply](#) [Cancel](#)

Fig. 38: Configure recording widget

Name	Name of the widget . The name is displayed in the title bar of the widget.
Refresh cyclically	Select whether the information displayed in the widget is supposed to be refreshed cyclically. <input checked="" type="checkbox"/> = Widget is refreshed. <input type="checkbox"/> = Widget is not refreshed.
Refresh	Refresh interval in which the widget will be refreshed cyclically if the option <i>Refresh cyclically</i> has been activated. Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.

- To apply the settings, click on the button *Apply*.
To discard the settings, click on the button *Cancel*.

Selection of statistic values

- Click on the icon  (*Settings*) in the title bar of the [widget](#).
- Select the menu item *Statistic Values*.
- Select 1 or several statistic values.

Selection of the Statistic Values ✕

Maximum number of concurrent recordings

☒

Average call duration in seconds

☒

Incoming calls

☒

[Save](#) [Cancel](#)


Fig. 39: Select statistic values

Incoming calls	Will display the total number of recorded calls with the conversation direction <i>incoming</i> within the considered period in the widget .
-----------------------	--

<i>Outgoing calls</i>	Will display the total number of recorded calls with the conversation direction <i>outgoing</i> within the considered period in the widget .
<i>Total number of calls</i>	Will display the total number of recorded calls regardless of the conversation direction within the considered period in the widget .
<i>Average call duration</i>	Will display the average duration of recorded calls within the considered period in the widget . The average duration is displayed in seconds.
<i>Maximum number of concurrent recordings</i>	Will display the maximum number of concurrently recorded calls in the widget based on the licenses deployed to do so.

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

Configure dashboard parameters

- Click on the icon  (*Settings*) in the title bar of the [widget](#).
- Select the menu item *Dashboard Parameters*.
- Adjust the respective settings.

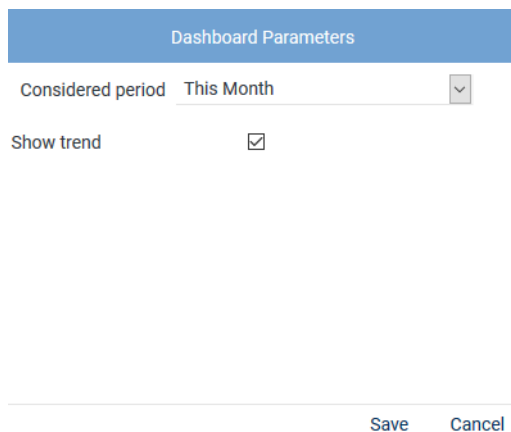


Fig. 40: Configure dashboard parameters

<i>Considered period</i>	<p>Select the considered period from the drop-down list.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> • <i>Last Hour</i> • <i>Last 12 Hours</i> • <i>Today</i> • <i>This Week</i> • <i>This Month</i> • <i>This Quarter</i>
<i>Show trend</i>	<p>Select whether a trend is supposed to be displayed.</p> <p><input checked="" type="checkbox"/> = Trend is displayed.</p> <p><input type="checkbox"/> = No trend is displayed.</p> <p>The following comparison periods for the trends are available:</p> <ul style="list-style-type: none"> • <i>last hour/the hour before</i> • <i>last 12 hours/the 12 hours before</i> • <i>today/yesterday</i>

- *this week/last week*
- *this month/last month*
- *this quarter/last quarter*

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

6.12 Report widget

The Report [Widget](#) allows displaying reports.


Report Widget	
<div> <div>Name ▾</div> <div>Date ▾</div> </div>	
Agent comparison - evaluation template	11/14/2018 1:41:57 PM




Fig. 41: Report widget

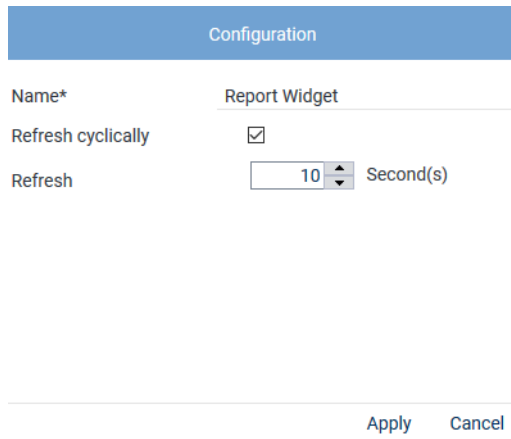


You can only see reports for the data of which you have access rights.

- To display a report, select the report in the list.
 - Click on the icon  (*Show preview*) in the toolbar of the [widget](#).
 - Select the format you would like to open the report with.
 - In the following window, click on *Open with* or on *Save file* to open the report directly or to save it in your download folder and open it from there.
- ⇒ The report is displayed in a window in the foreground.

6.12.1 Configure report widget

- Click on the icon  (*Settings*) in the title bar of the [widget](#).
- Select the menu item *Settings*.
- Adjust the respective settings.



The image shows a 'Configuration' dialog box for a 'Report Widget'. It has a title bar 'Configuration' and a tab 'Report Widget'. Inside, there are three fields: 'Name*' (empty), 'Refresh cyclically' (checked checkbox), and 'Refresh' (a numeric spinner set to '10' with 'Second(s)' to its right). At the bottom right are 'Apply' and 'Cancel' buttons.

Fig. 42: Configure report widget

<i>Name</i>	Name of the widget. The name is displayed in the title bar of the widget.
<i>Refresh cyclically</i>	Select whether the information displayed in the widget is supposed to be refreshed cyclically. <input checked="" type="checkbox"/> = Widget is refreshed. <input type="checkbox"/> = Widget is not refreshed.
<i>Refresh</i>	Refresh interval in which the widget will be refreshed cyclically if the option <i>Refresh cyclically</i> has been activated. Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.


- To apply the settings, click on the button *Apply*.
To discard the settings, click on the button *Cancel*.

6.13 Detail view of conversations

Details of agents' the active conversations are displayed in different locations:


- In individual widgets
- In dialog windows
- In the detail view of the conversation status overview

The following information is displayed in the detail view:

<i>Agent</i>	Name of the agent who is in conversation.
<i>Extension</i>	Extension of the end device via which the conversation is running.
<i>PBX name</i>	Name of the PBX to which the end device has been connected.
<i>Phone name</i>	Name of the phone via which the conversation is running.
<i>Phone type</i>	Type of the phone via which the conversation is running.
<i>IP address</i>	IP address of the end device via which the conversation is running.
<i>MAC address</i>	MAC address of the end device via which the conversation is running.
<i>Computer name</i>	Name of the computer on which the recording is running.
<i>Status</i>	Current status of the conversation. The status is displayed by means of an icon. See chapter "Icons end devices status", p. 24 . By clicking on the icon  (<i>Monitoring</i>) you can activate that the conversation is monitored. NOTICE! This function is currently not available.

Tab. 8: Conversation details

6.13.1 Configure detail view widget of conversations

1. Click on the icon  (*Settings*) in the title bar of the [widget](#).
2. Select the menu item *Settings*.
3. Adjust the respective settings.

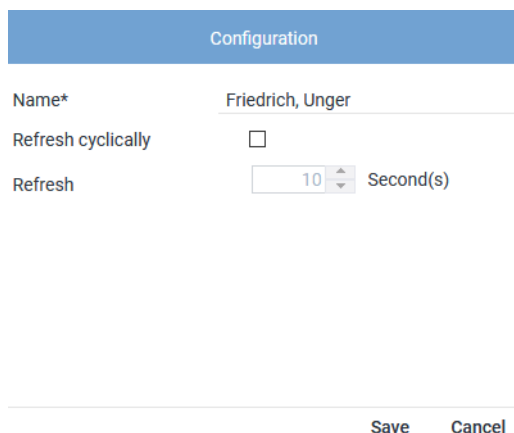


Fig. 43: Configure detail view widget

Name	Name of the agent who has been assigned the end device.
Refresh cyclically	Select whether the information displayed in the widget is supposed to be refreshed cyclically. <input checked="" type="checkbox"/> = Widget is refreshed. <input type="checkbox"/> = Widget is not refreshed.
Refresh	Refresh interval in which the widget will be refreshed cyclically if the option <i>Refresh cyclically</i> has been activated. Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.

4. To apply the settings, click on the button *Save*.
To discard the settings, click on the button *Cancel*.

7 Applications module

The Applications module allows opening the different applications of the product line neo.



Only those applications are displayed in the navigation bar which are available to you according to your function rights.

7.1 Open application

1. Open the Applications module by clicking on the menu item *Applications* in the navigation bar.
 - ⇒ All applications for which you have rights are displayed in the navigation bar.

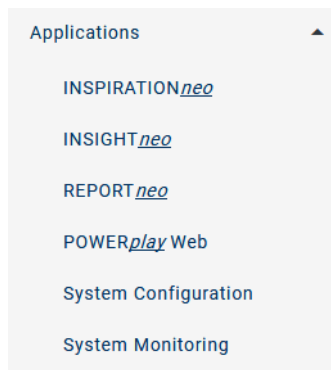


Fig. 44: Open applications (example)




























2. Click on the name of the application you would like to open.
 - ⇒ A new window is opened in the browser.
 - ⇒ The application is started in this new window without the need of logging in again.

8 Notifications module

In the Notifications module, you can see all notifications you have received.

8.1 Main view










All notifications addressed to you within the recording system are displayed in the main view.

Type	Priority	Read	Subject	Sender	Date
			Der Mitarbeiter hat sich abgemeldet.	SYSTEM	11/21/2018 8:17:34 AM
			Der Mitarbeiter hat sich angemeldet.	SYSTEM	11/21/2018 7:44:47 AM
			Der Mitarbeiter hat sich abgemeldet.	SYSTEM	11/21/2018 7:25:49 AM
			Der Mitarbeiter hat sich angemeldet.	SYSTEM	11/21/2018 6:55:31 AM
			Der Mitarbeiter hat sich angemeldet.	SYSTEM	11/21/2018 6:46:45 AM
			Der Mitarbeiter hat sich angemeldet.	SYSTEM	11/21/2018 6:42:22 AM
			Der Mitarbeiter hat sich abgemeldet.	SYSTEM	11/21/2018 6:37:53 AM
			Der Mitarbeiter hat sich angemeldet.	SYSTEM	11/21/2018 6:36:13 AM
			Der Mitarbeiter hat sich abgemeldet.	SYSTEM	11/21/2018 6:21:44 AM

Rows per page 50 1 - 50 of 265

Fig. 45: Notifications - main view

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

Type	 = Audit: This notification type is used to trace user interactions, e. g.: "The user has logged off."  = Info: This notification type is used to prompt users to become active in a certain way, e. g.: "Your password has expired. Please contact your system administrator."  = Monitoring: This notification type is triggered by the system if the status of a monitor changes, e. g.: "Drive C: does not have enough capacity anymore."
Priority	Priority of the notification.  = very high  = high  = medium  = low
Read	Shows whether the notification has already been read.  = unread notification  = read notification
Subject	Subject line of the notification.
Sender	Name of the sender of the notification.
Date	Date on which you received the notification.





You can change the sort sequence and order of the columns arbitrarily, see [chapter "Change sort sequence", p. 20](#) and [chapter "Adjust table", p. 45](#). You can adjust the column width, too, by clicking on the right margin of the field containing the column headline, holding the mouse key down, and dragging the column to the required width.

The main view contains a toolbar with all functions which can be used for the elements of the main view.

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

51 - 100 of 298 ◀ ◀ ▶ ▶

Fig. 46: Changing pages

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

You can also navigate horizontally with the scrollbar in the main view.




8.1.1

Toolbar


The toolbar offers the following functions.



Fig. 47: Notifications module - toolbar

	<i>Refresh</i>	Refreshes the main view.
	<i>Mark as read</i>	Sets the selected notification on the status "read".
	<i>Delete</i>	Deletes the selected notification.
<i>Notifications</i>		This menu is currently not available
<i>General</i>	<i>Adjust Table</i>	Opens the window <i>Table Configuration</i> (see chapter "Adjust table", p. 45).
	<i>Save Table Configuration</i>	Saves the current table configuration (see chapter "Save table configuration", p. 46).
	<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. 46 . When opening the module, a search filter is set automatically so that only data sets of the current day are displayed.
	<i>Reset Search</i>	Resets all manually entered search criteria. The search is started without manual filter settings.
	<i>General Help</i>	By clicking on the menu item <i>General Help</i> , a description of the application you are currently viewing is opened. See chapter "Call up online help", p. 19 .
	<i>Module Help</i>	By clicking on the menu item <i>Module Help</i> , a description of the module you are currently viewing is opened. See chapter "Call up online help", p. 19 .

8.1.1.1 Mark notification as read

1. Select the notification from the list.
 2. Click on the icon  (*Mark as read*) in the toolbar.
- ⇒ The notification is marked as read.

8.1.1.2 Adjust table

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

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

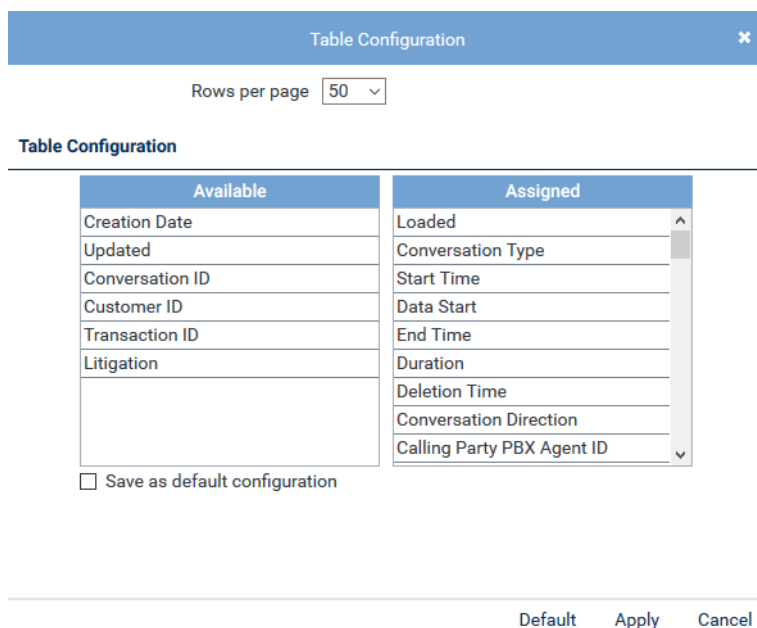



Fig. 48: Adjust table of the main view (example)


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

The following functions are available:

Rows per page 50 ▾	Number of rows per page.
<i>Save as default configuration</i>	<p>If this check box is activated, the table configuration is saved as default for the employees of the tenant upon applying the changes.</p> <p>NOTICE! The option is only displayed if you have the respective right for this function.</p>
Default	Resets the configuration in the window <i>Table Configuration</i> to the default settings and closes the window.
Apply	<p>Saves all changes and closes the window <i>Table Configuration</i>.</p> <p>If the check box <i>Save as default configuration</i> has been activated, a dialog window appears upon applying the changes. In the dialog window click on the button <i>Yes</i> or <i>No</i>.</p> <p>Yes</p> <p>The current table configuration is saved as default for the tenant. All table configurations existing for this module are deleted from</p>

	<p>the database.</p> <p>When opening the module, the employees of the tenant see the new table configuration that has been saved.</p> <p><i>No</i></p> <p>The current table configuration is saved as default for the tenant. When opening the module, the employees of the tenant see the new table configuration that has been saved if no other individual configuration has been saved.</p>
	Closes the window <i>Table Configuration</i> without applying the changes.

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

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

8.1.1.2.1 Change column width of the table

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

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

8.1.1.3 Save table configuration

1. To save the table configuration, click on the menu item *General > Save Table Configuration* in the toolbar of the main view.
⇒ The table will be displayed in the saved layout in the future.



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

8.1.1.4 Search

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



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

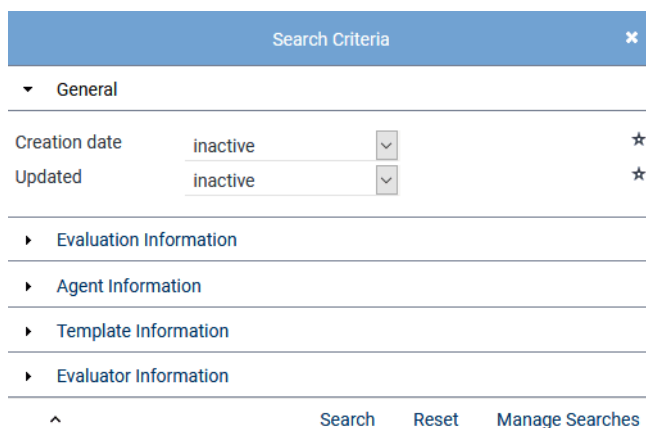









Fig. 49: Search Criteria (example)

The following functions are available:

	Shows the content of the search category.
	Hides the content of the search category.
	Adds the search criterion to the list of favorites.
	Removes the search criterion from the list of favorites.
	Hides the content of the window.
	Shows the content of the window.
Search	Starts the search.
Reset	Resets all manually entered search criteria.
Manage Searches	Enables you to save and load search procedures.
	Closes the window <i>Search Criterion</i> .

8.1.1.4.1 Search criteria




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

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

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

<i>in</i>	One or several values are entered which are supposed to be searched for. The search displays all entries which match one of these values.
<i>not in</i>	One or several values are entered which are supposed to be searched for. The search displays all entries which do not match one of these values.

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

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

8.1.1.4.2 Run a search

1. Click on the menu item *General > Search* in the toolbar.
 - ⇒ If no saved searches exist, the window *Search Criteria* appears directly, see [Fig. 51, p. 49](#).
 - ⇒ If saved searches exist, the window *Search* appears.

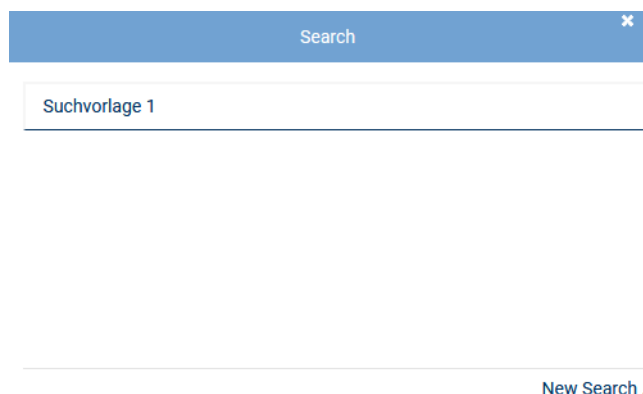


Fig. 50: Window Search (example)

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

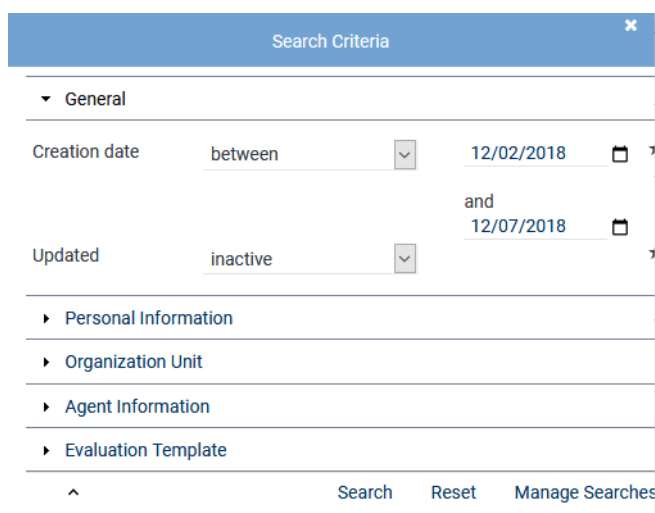



Fig. 51: Window Search Criteria (example)

4. Set the respective search criteria, see [chapter "Search criteria", p. 47](#).
5. Click on the button *Search*.
 - ⇒ The found results are displayed in the main view.
6. To save the set search criteria, click on the button *Manage Searches* > menu item *Save as...*, see [chapter "Save search", p. 49](#).
 To reset all manually entered search criteria, click on the button *Reset*.
 To close the window *Search Criteria*, click on the icon .

8.1.1.4.3 Save search

You can save previously defined search settings.

The names of the saved search settings are displayed directly upon calling up the search function, see [chapter "Run a search", p. 48](#).

1. Set the respective search criteria, see [chapter "Search criteria", p. 47](#).

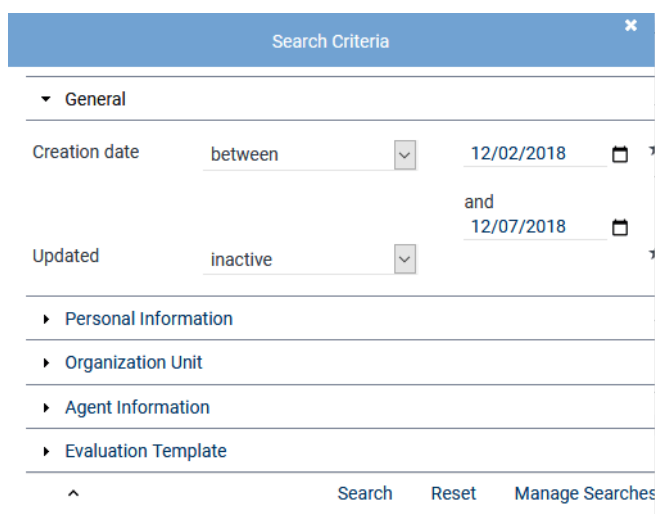
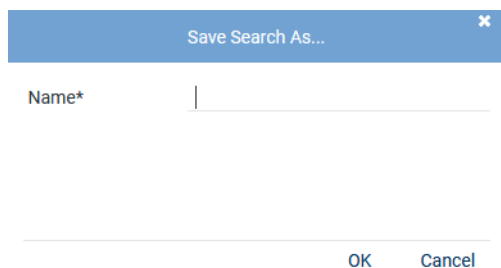


Fig. 52: Enter search criteria (example)

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



Save Search As...

Name* |

OK Cancel

Fig. 53: Save search

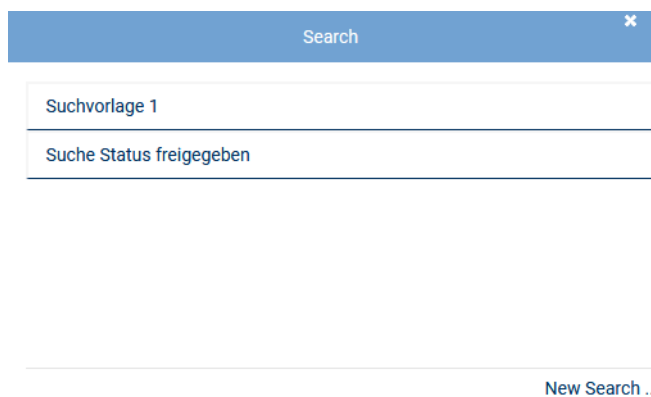
- To save the search, click on the button *OK*.
To cancel the saving process, click on the button *Cancel*.



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

8.1.1.4.4 Edit saved search

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



Search

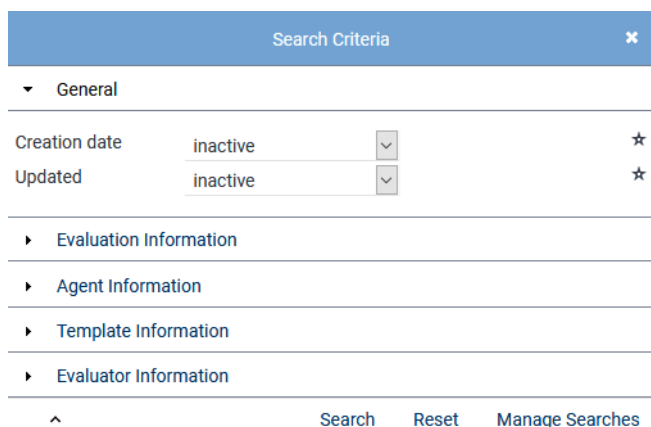
Suchvorlage 1

Suche Status freigegeben

New Search ..

Fig. 54: Window Search (example)

- Click on the button *New Search*.
⇒ 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. 55: Window Search Criteria (example)

- Click on the button *Manage Searches > menu item Saved Searches*.
⇒ The window *Saved Searches* appears.

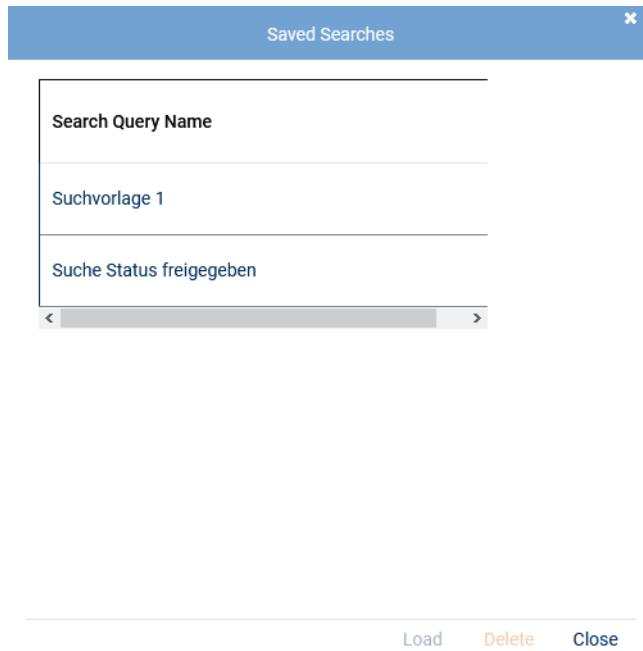


Fig. 56: Saved Searches (example)

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

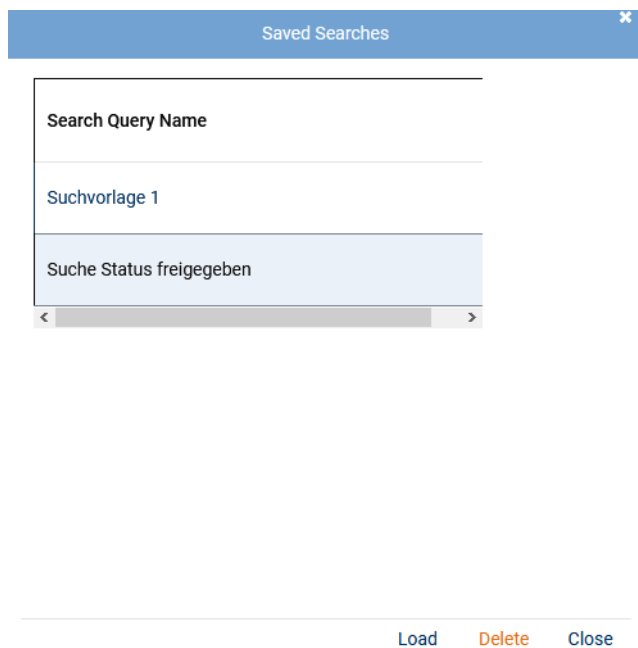


Fig. 57: Edit saved search (example)

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

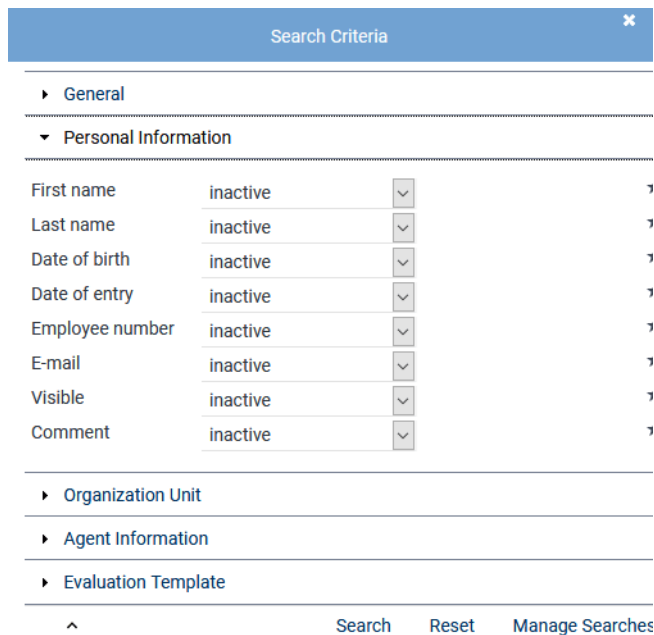


Fig. 58: Search Criteria (example)

6. Adjust the search criteria according to your requirements.
7. To save the edited search under the same name, click on the button *Manage Searches* > menu item *Save*.
To save the edited search under a different name, click on the button *Manage Searches* > menu item *Save as...*, see [chapter "Save search", p. 49](#).

8.1.1.4.5 Search via saved search

If you have saved search settings (see [chapter "Save search", p. 49](#)), you can quickly search for the saved search criteria.

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

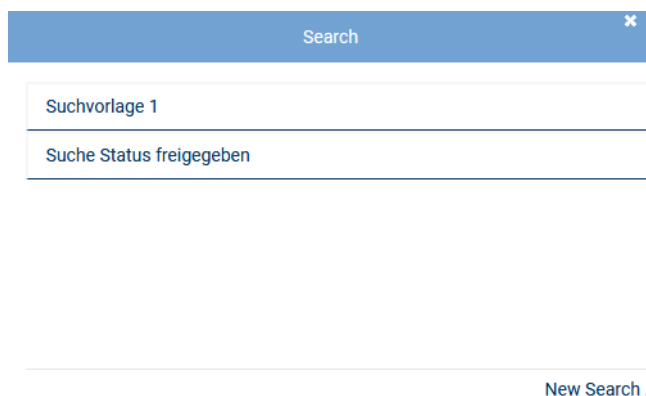
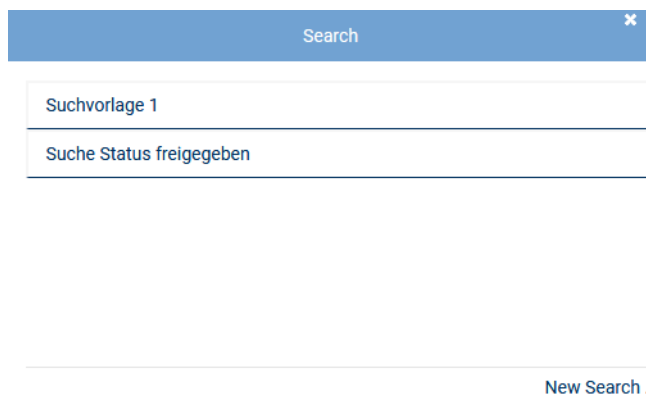


Fig. 59: Search (example)

2. Click on the name of the saved search you would like to use for the search.
⇒ The found results are displayed in the main view.

8.1.1.4.6 Delete saved search

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

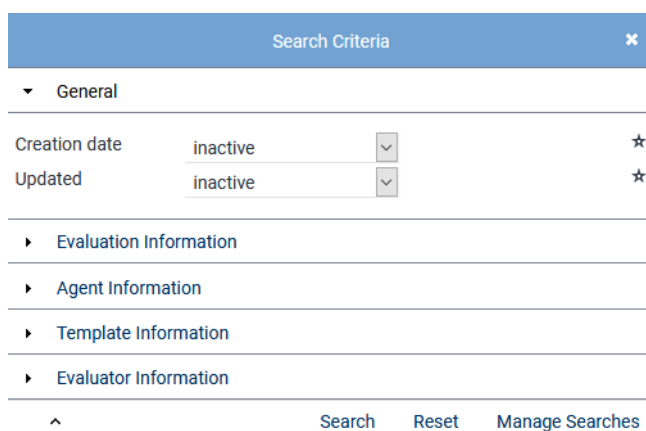


Search	
Suchvorlage 1	
Suche Status freigegeben	

New Search ..

Fig. 60: Window Search (example)

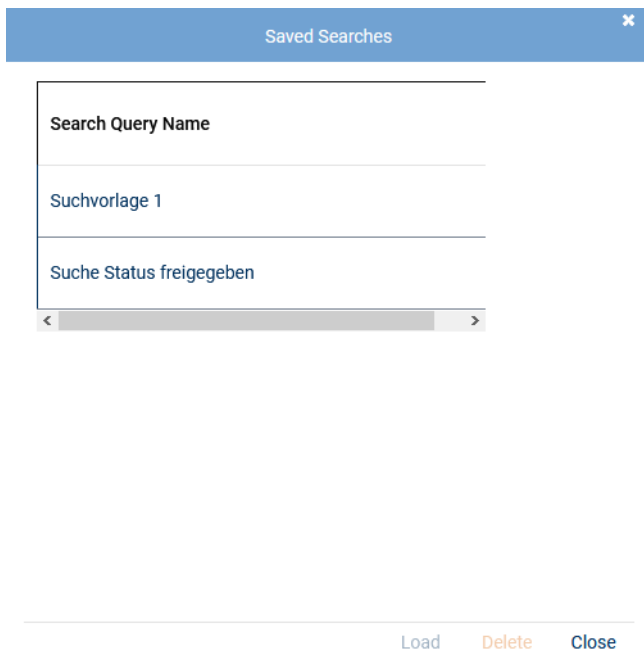
- Click on the button *New Search*.
⇒ The window *Search Criteria* appears.



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

Fig. 61: Window Search Criteria (example)

- Click on the button *Manage Searches* > menu item *Saved Searches*.
⇒ The window *Saved Searches* appears.



Saved Searches	
Search Query Name	
Suchvorlage 1	
Suche Status freigegeben	

Load Delete Close

Fig. 62: Saved Searches (example)

- Select the search you would like to delete.

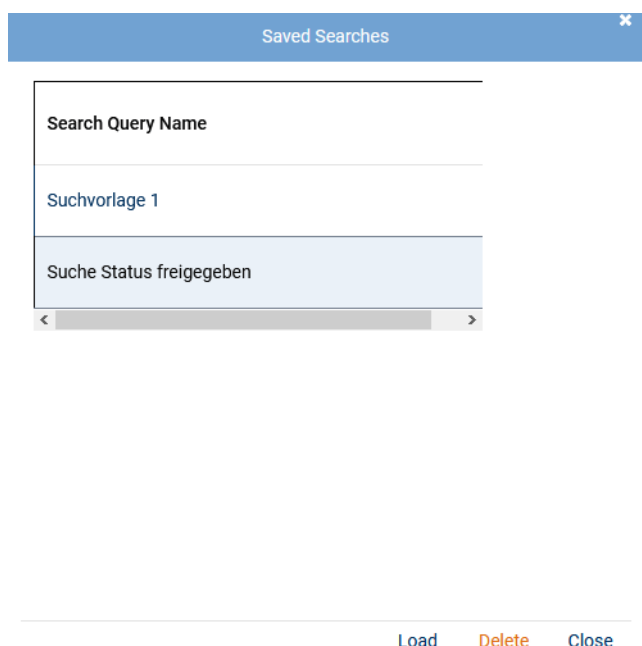


Fig. 63: Delete saved search (example)

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

8.1.1.4.7 Create search favorite

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

1. Click on the menu item *General > Search* in the toolbar.
 - ⇒ If no saved searches exist, the window *Search Criteria* appears.
 - ⇒ If saved searches exist, the window *Search* appears.
Open a saved search, see Edit saved search, or open the window *Search Criteria* by clicking on the button *New Search*.
2. Set the respective search criteria, see [chapter "Search criteria", p. 47](#).

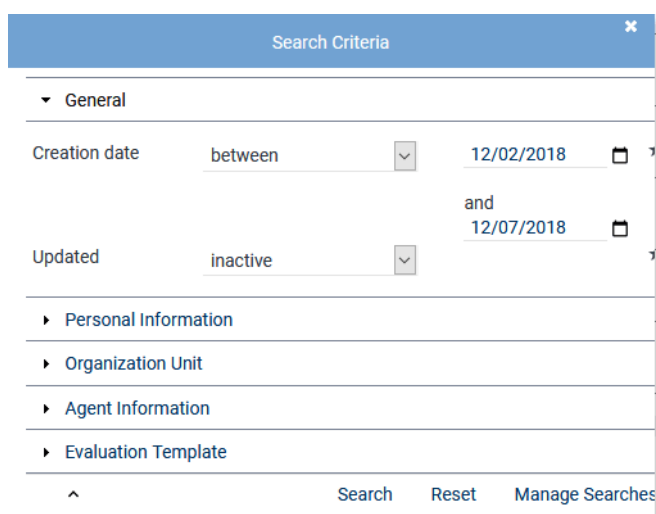
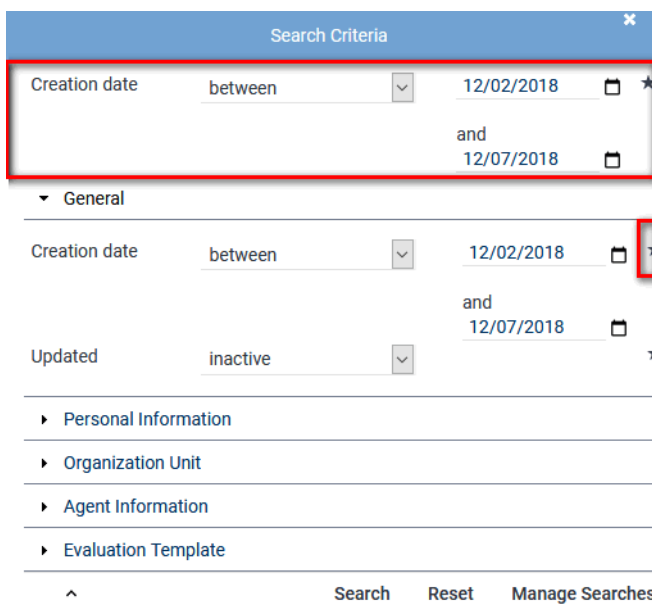


Fig. 64: Enter search criteria (example)

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

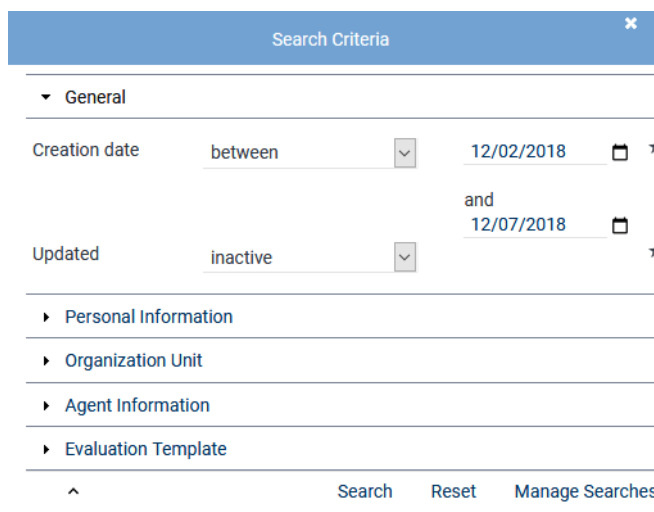
- ⇒ The criterion tagged as favorite is displayed additionally in the upper area of the window and marked with the icon ★.



The screenshot shows a 'Search Criteria' window. At the top, a criterion is highlighted with a red box: 'Creation date' with a 'between' operator, dates '12/02/2018' and '12/07/2018', and a star icon indicating it is a favorite. Below this, under the 'General' section, the same criterion is listed again, but without the star icon. Further down are sections for 'Personal Information', 'Organization Unit', 'Agent Information', and 'Evaluation Template'. At the bottom are buttons for 'Search', 'Reset', and 'Manage Searches'.

Fig. 65: Search criterion tagged as favorite (example)

4. If you do not want to use a criterion tagged as favorite as a favorite anymore, click on the icon ★.
 - ⇒ The criterion which is now no longer tagged as favorite is marked with the icon ★.
 - ⇒ The criterion is no longer displayed in the upper area of the window.



This screenshot is similar to Fig. 65, but the criterion 'Creation date' between '12/02/2018' and '12/07/2018' is no longer in the top section. It is only listed under the 'General' section. The star icon is absent, indicating it is no longer a favorite. The rest of the interface, including the 'Personal Information' sections and bottom buttons, remains the same.

Fig. 66: Search criterion not tagged as favorite (example)

8.2 Detail view

The detail view contains information of the selected notification in a compressed format.

The employee has logged on.

<Details>

Hilfe

Betreff

The employee has logged on.

Text

The employee Admin,
1st-Tenant has logged on to
Portal from 192.168.11.79.

Datum

20.05.2019 18:07:58

Absender

SYSTEM

Priorität

Normal

Gelesen

Nein

Fig. 67: Notifications - detail view

<i>Subject</i>	Subject line of the notification.
<i>Text</i>	Complete content of the notification.
<i>Date</i>	Date on which you received the notification.
<i>Sender</i>	Name of the sender of the notification.
<i>Priority</i>	Priority of the notification.
<i>Read</i>	Shows whether the notification has already been read.

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Glossary

IP

Internet Protocol, basic protocol for Internet communication

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)

Widget

Component of a graphical dialog system. Consists of a visible window and an invisible object which saves the configuration of the component. Is used for the interaction with the user and the automatically updatable display of information.