INSIGHT*neo*

Report Templates module

User manual

11/5/2021

Product line *neo*, version 6.x

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

EVOIP*neo*

EVOLUTION*neo* / XXL / eco

INSPIRATION*neo*

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Contents

1 General information ... 6

2 Introduction ... 7

3 Default report templates ... 8

3.1 Agent-based reports ... 8
3.1.1 Agent feedback - overview ... 8
3.1.2 Agent trend analysis (evaluation time) ... 9
3.1.3 Agent trend comparison (evaluation time) ... 10
3.1.4 Agent trend comparison (session time) ... 11
3.1.5 Agent comparison - evaluation template ... 12
3.1.6 Agent comparison - skills ... 13
3.1.7 Agent comparison - objects ... 14
3.1.8 Agent comparison - objects (detailed) ... 15
3.1.9 Agent comparison - overview ... 16
3.1.10 Detailed agent evaluation (graphical) ... 17
3.1.11 Detailed agent evaluation (text form) ... 17
3.2 Group-based reports ... 18
3.2.1 Group trend analysis (evaluation time) ... 18
3.2.2 Group trend comparison (evaluation time) ... 19
3.2.3 Group trend comparison (session time) ... 20
3.2.4 Group comparison - evaluation template ... 21
3.2.5 Group comparison - skills ... 22
3.2.6 Group comparison - objects ... 22
3.2.7 Group comparison - objects (detailed) ... 23
3.2.8 Group comparison - overview ... 24
3.2.9 Group comparison - detailed ... 25
3.3 Supervisor-based reports ... 25
3.3.1 Supervisor productivity - detailed ... 25
3.3.2 Supervisor productivity - overview ... 26
3.3.3 Supervisor productivity - overview (graphical) ... 27
3.3.4 Supervisor comparison - calibrations (line chart) ... 27
3.3.5 Supervisor comparison - calibrations (bar chart) ... 28
3.4 E-learning reports ... 29
3.4.1 Agent comparison - quiz template ... 29
3.4.2 Group comparison - quiz template ... 30
3.4.3 Training progress ... 31
3.5 Analysis reports ... 32
3.5.1 Evaluation keyword spotting ... 32
3.5.2 Speech analysis - Word ranking ... 33
3.5.3 Time difference of process duration ... 34

3.5.4 Speech analytics - categories ... 34
3.5.5 KWS statistics ... 35
3.6 Other reports ... 35
3.6.1 Deleted call info - agent ... 35
3.6.2 Deleted call info - agent (graphical) ... 36
3.6.3 Deleted call info - agent group detailed ... 37
3.6.4 Deleted call info - agent group overview ... 37
3.6.5 Tenant-specific system usage ... 38
3.6.6 System disturbances voice recording ... 38
3.6.7 Audit log ... 39
3.6.8 Voice recordings (system) ... 40
3.6.9 Voice recordings (tenant) ... 41
3.6.10 Import statistics ... 41
3.6.11 Recording check Cisco ... 42
3.6.12 Recording check Skype for Business ... 42
3.6.13 Recording Content Validation ... 43
3.6.14 Extension check ... 44
3.6.15 Locked conversations - overview ... 44
3.7 Nonstandard reports ... 45
3.7.1 User call overview ... 45
3.7.2 Detailed call activity ... 45
3.7.3 Daily call overview ... 46
4 Default dashboard templates ... 48
4.1 Agent dashboards ... 48
4.1.1 My duration - agent ... 48
4.1.2 My score - agent ... 48
4.1.3 My quantity - agent ... 49
4.1.4 My team score - agent ... 49
4.1.5 My team knowledge - agent ... 50
4.1.6 My knowledge - agent ... 50
4.2 Supervisor dashboards ... 51
4.2.1 My quantity - supervisor ... 51
4.2.2 My team - supervisor ... 51
4.3 Recording dashboards ... 52
4.3.1 Total number of calls ... 52
4.3.2 Average duration of all recordings ... 53
4.3.3 Maximum number of concurrent recordings ... 54
4.4 Other dashboards ... 55
4.4.1 Average call duration ... 55
4.4.2 Number of sessions ... 55
4.4.3 Evaluation keyword spotting ... 57

5 Main view ... 58
5.1 Toolbar ... 58
5.1.1 Search ... 59
6 Detail view ... 61
6.1 Tab Details ... 61
6.2 Tab Parameters ... 63
6.2.1 Edit parameters ... 63
6.2.1.1 Edit GUI element ... 64
6.3 Tab Report Instances ... 66
7 Create ... 67
7.1 Create report template ... 67
8 Upload File ... 69
9 Export Report Template ... 71
10 Import system report template ... 72
List of figures ... 74
List of tables ... 77
Glossary ... 78

1 General information

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2 Introduction

In the Report Templates module, you can upload report templates that you have created yourself by means of a specific design tool (see chapter "Create", p. 67) or import default templates provided directly in the system (see chapter "Import system report template", p. 72). Depending on the purpose of use, you can import/create report templates, dashboard templates or recording dashboard templates.

Within the system, you are provided with different predefined templates to create reports (see chapter "Default report templates", p. 8) and dashboard reports (see chapter "Default dashboard templates", p. 48).

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

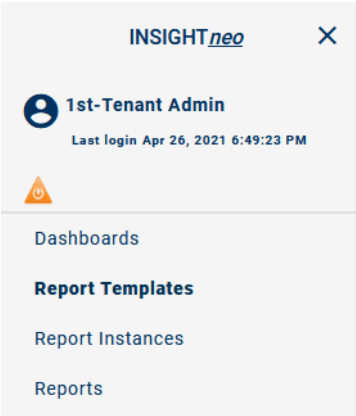


Fig. 1: Menu item Report Templates

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

3 Default report templates

By means of default report templates, you can generate report which present the results in lists and tables. The following default report templates are available in the system:

3.1 Agent-based reports

3.1.1 Agent feedback - overview

This report displays a table which gives supervisors an overview of the status of the agents' feedback on their evaluations. The report is divided into agent groups and agents.

The different column display:

- *# of all evaluations*: all evaluations irrespective of the feedback settings
- *# of evaluations assigned for feedback*: all evaluations for which a feedback has been submitted or for which a feedback can still be submitted
- *# of evaluations with the feedback "<empty>"*: Evaluations with the evaluation status *Agent feedback pending* or *Released* and the feedback status *Not yet confirmed*. This includes evaluations which have been released automatically when the agent has not made use of the option to submit a feedback until a set deadline.
- *# of evaluations with the feedback I agree*: Evaluations that have been confirmed by the agent and released
- *# of evaluations with the feedback I disagree*: Evaluations that the agent has objected to and that have been set to *Ignore* or *Obsolete*

Re-evaluations which have been initiated because the agent has objected to the original evaluation are not included in the report. In addition, only those evaluations are considered which have been created by the user who is currently implementing the report. This implies that the currently active user cannot see the feedback values of other supervisors or evaluators.

Agent feedback - overview

Report template: Agent feedback - overview

created: 10/21/15 9:51:20 AM with INSPIRATIONneo

The report provides an overview of the agent's feedback to their evaluations. The number of agreed and disagreed evaluations per agent is listed. This report is structured in supervisors, agent groups and agents.

This report considers evaluations between **1/1/14** and **10/21/15** and shows agents of the supervisor **2nd-Tenant PDM-Admin**.

		# of all evaluations	# of evaluations assigned for feedback	# of evaluations with confirmation "<empty>"	# of evaluations with confirmation "I agree"	# of evaluations with confirmation "I disagree"
Corporate clients / Firmenkunden	Brown, Caroline	8	8	1	7	0
	Fox, Steven	5	5	0	4	1
	Miller, Kimberly	2	2	0	2	0
Service Center	Brown, Caroline	8	8	1	7	0
	Fox, Steven	5	5	0	4	1
	Miller, Kimberly	2	2	0	2	0
Standort Magdeburg Level	Brown, Caroline	8	8	1	7	0
	Fox, Steven	5	5	0	4	1
	Miller, Kimberly	2	2	0	2	0
Standort Magdeburg	Brown, Caroline	8	8	1	7	0
	Fox, Steven	5	5	0	4	1
	Miller, Kimberly	2	2	0	2	0
Team 1 Level	Brown, Caroline	8	8	1	7	0
	Fox, Steven	5	5	0	4	1
Team 1	Brown, Caroline	8	8	1	7	0
	Fox, Steven	5	5	0	4	1
Team 2 Level	Miller, Kimberly	2	2	0	2	0
Team 2	Miller, Kimberly	2	2	0	2	0
Team A	Fox, Steven	5	5	0	4	1
	Miller, Kimberly	2	2	0	2	0
Team B	Brown, Caroline	8	8	1	7	0

Fig. 2: Agent feedback - overview

This report template is available on tenant level.

3.1.2 Agent trend analysis (evaluation time)

This report displays the average score that the selected agent has achieved within the defined period of time in a line chart. After briefly comparing all selected agents, the focus is on the evaluation results of the individual agent.

The agent is analyzed by means of:

- the total score - across several templates, if required,
- the results for one or several template(s),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. Agents whose evaluation information does not match the configurable parameters are not listed in the report. The time axis (x-axis) shows the time when the evaluation was released. The values displayed in the diagram are average values for the day.

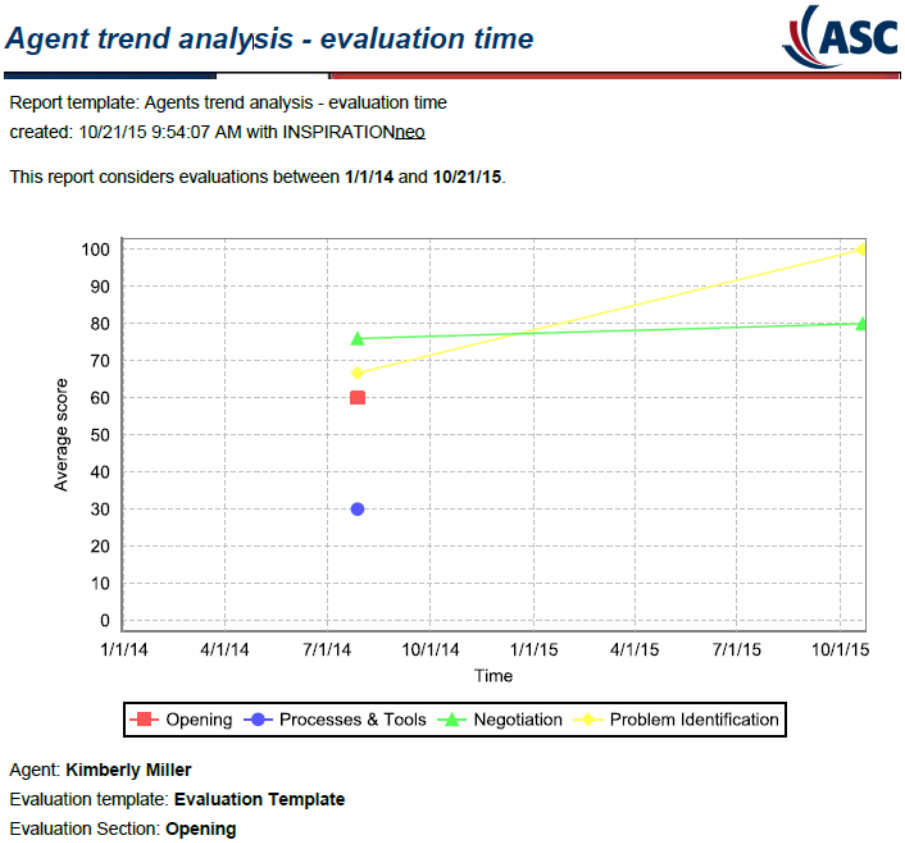


Fig. 3: Agent trend analysis - evaluation time

This report template is available on tenant level.

3.1.3 Agent trend comparison (evaluation time)

This report displays the average scores that the selected agents have achieved within the defined period of time in a line chart. The time axis (x-axis) shows the time when the evaluation was released.

The focus is on comparing the selected agents.

The agents are compared by means of:

- the total score - across several templates, if required,
- the results for one or several template(s) (overall),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. Agents whose evaluation information does not match the configurable parameters are not listed in the report. The values displayed in the diagram are average values for the day.

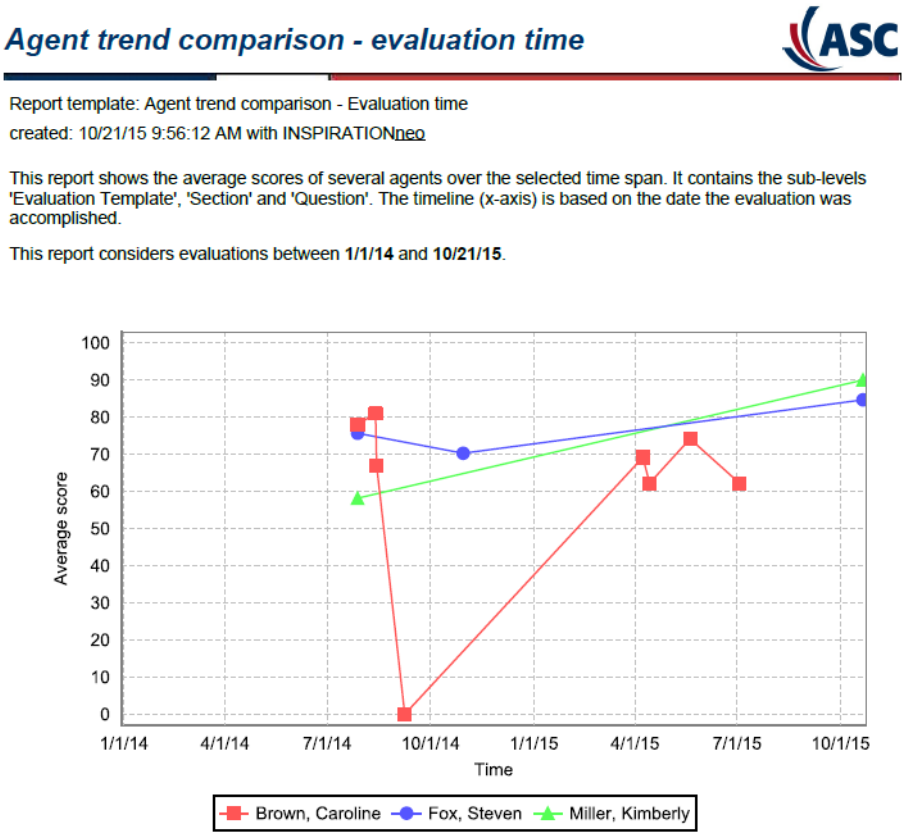


Fig. 4: Agent trend comparison - evaluation time (example)

This report template is available on tenant level.

3.1.4 Agent trend comparison (session time)

This report displays the average scores that the selected agents have achieved within the defined period of time in a line chart. The time axis (x-axis) shows the time when the session corresponding to the evaluation was recorded

The focus is on comparing the selected agents.

The agents are compared by means of:

- the total score - across several templates, if required,
- the results for one or several template(s) (overall),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

The report only considers first evaluations and re-evaluations of sessions which have been started within the indicated period of time. Agents whose evaluation information does not match the configurable parameters are not listed in the report. The values displayed in the diagram are average values for the day.

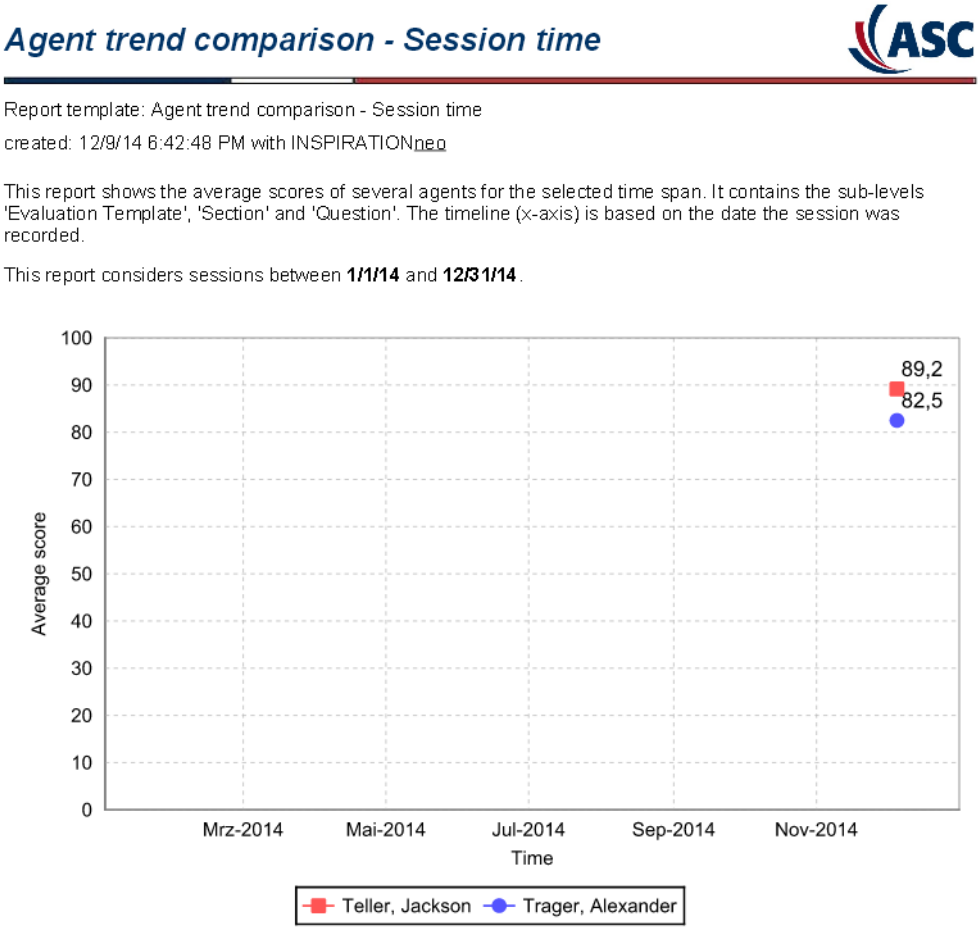


Fig. 5: Agent trend comparison - session time (example)

This report template is available on tenant level.

3.1.5 Agent comparison - evaluation template

This report compares the average scores that the selected agents have achieved in all their evaluations based on the selected template within the defined period of time. It also shows the number of the evaluations per agent and the score of the entire group.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. To appear in the report, the agent must belong to at least one organization unit. If the agent belongs to several organization units, he will appear in the table of each organization unit. Agents whose evaluation information does not match the configurable parameters are not listed in the report.

This report is of benefit to supervisors who would like to get an overview of the service level related to a certain campaign, for instance.

Agent comparison - evaluation template

Report template: Agent comparison - Evaluation template

created: 10/21/15 9:23:03 AM with INSPIRATION*neo*

This report shows the average scores of all evaluations made with the selected evaluation template on the agents for the selected time span. It furthermore shows the number of evaluations per agent as well as the values for the entire group.

This report considers evaluations between **1/1/15** and **12/31/15**.

Evaluation template: **Evaluation Template**

Agent group: Corporate clients / Firmenkunden

Agent (Agent ID)	Average Score	Number of Evaluations
Brown, Caroline (310008)	66.9	4
Fox, Steven (310007)	84.7	1
Miller, Kimberly (310006)	90.0	1

Agent group: Service Center

Agent (Agent ID)	Average Score	Number of Evaluations
Brown, Caroline (310008)	66.9	4
Fox, Steven (310007)	84.7	1
Miller, Kimberly (310006)	90.0	1

Agent group: Standort Magdeburg

Agent (Agent ID)	Average Score	Number of Evaluations
Brown, Caroline (310008)	66.9	4
Fox, Steven (310007)	84.7	1
Miller, Kimberly (310006)	90.0	1

Agent group: Standort Magdeburg Level

Agent (Agent ID)	Average Score	Number of Evaluations
Brown, Caroline (310008)	66.9	4
Fox, Steven (310007)	84.7	1
Miller, Kimberly (310006)	90.0	1

Agent group: Team 1

Agent (Agent ID)	Average Score	Number of Evaluations
Brown, Caroline (310008)	66.9	4
Fox, Steven (310007)	84.7	1

Color code:
Red lower than 60
Yellow between 60 and 80
Green higher than 80

Fig. 6: Agent comparison - evaluation template (example)

This report template is available on tenant level.

3.1.6 Agent comparison - skills

This report compares the average scores that the selected agents have achieved in the evaluation of their skills based on the selected template within the defined period of time. Only the results based the sections (skills) of one or several evaluation templates are considered.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. To appear in the report, the agent must belong to at least one organization unit. If the agent belongs to several organization units, he will appear in the table of each organization unit. Agents whose evaluation information does not match the configurable parameters are not listed in the report.

This report is of benefit to supervisors and trainers who would like to get an overview of the strengths and weaknesses of their employees to be able to train them individually if required.

Agent comparison - skills

Report template: Agent comparison - Skills

created: 10/21/15 9:37:27 AM with INSPIRATIONneo

This report shows the average scores of the different sections acquired by the agents with the selected evaluation template for the selected time span.

This report considers evaluations between **1/1/15** and **12/31/15** and is based on Evaluation Template **Evaluation Template**.

	Evaluation Sections / Agent (Agent ID)	Opening	Processes & Tools	Negotiation	Problem Identification
Corporate clients / Firmenkunden	Brown, Caroline (310008)	66.7	83.0	72.2	66.7
	Fox, Steven (310007)	48.3	65.3	54.4	50.0
	Miller, Kimberly (310006)	72.5	57.5	67.8	77.8
Service Center	Brown, Caroline (310008)	66.7	83.0	72.2	66.7
	Fox, Steven (310007)	48.3	65.3	54.4	50.0
	Miller, Kimberly (310006)	72.5	57.5	67.8	77.8
Standort Magdeburg Level	Brown, Caroline (310008)	66.7	83.0	72.2	66.7
	Fox, Steven (310007)	48.3	65.3	54.4	50.0
	Miller, Kimberly (310006)	72.5	57.5	67.8	77.8
Standort Magdeburg	Brown, Caroline (310008)	66.7	83.0	72.2	66.7
	Fox, Steven (310007)	48.3	65.3	54.4	50.0
	Miller, Kimberly (310006)	72.5	57.5	67.8	77.8
Team 1 Level	Brown, Caroline (310008)	66.7	83.0	72.2	66.7
	Fox, Steven (310007)	48.3	65.3	54.4	50.0
Team 1	Brown, Caroline (310008)	66.7	83.0	72.2	66.7
	Fox, Steven (310007)	48.3	65.3	54.4	50.0
Team 2 Level	Miller, Kimberly (310006)	72.5	57.5	67.8	77.8
Team 2	Miller, Kimberly (310006)	72.5	57.5	67.8	77.8
Team A	Fox, Steven (310007)	48.3	65.3	54.4	50.0
	Miller, Kimberly (310006)	72.5	57.5	67.8	77.8
Team B	Brown, Caroline (310008)	66.7	83.0	72.2	66.7

Color code:
Red lower than 60
Yellow between 60 and 80
Green higher than 80

Fig. 7: Agent comparison - skills (example)

This report template is available on tenant level.

3.1.7 Agent comparison - objects

This report compares the average scores that the selected agents have achieved for the different objects of the selected evaluation template(s) within the defined period of time. The focus is on the average scores for the individual evaluation criteria (question objects).

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. To appear in the report, the agent must belong to at least one organization unit. If the agent belongs to several organization units, he will appear in the table of each organization unit. Agents whose evaluation information does not match the configurable parameters are not listed in the report.

The column headline does not feature more than the first three lines of the question text.

This report is of benefit to trainers who would like to coach an agent in a certain field regarding a special skill, for instance, and therefore need to know what the agent's weaknesses are.

Agent comparison - objects

Report template: Agent comparison - Objects

created: 10/21/15 9:42:35 AM with INSPIRATIONneo

This report shows the average scores for the different questions acquired by the agents created with the selected evaluation template for the selected time span.

This report considers evaluations between **1/1/14** and **10/21/15** and is based on Evaluation Template **Evaluation Template**.

Evaluation Section: **Opening**

	Evaluation Objects / Agent (Agent ID)	Adressing customer by name	Friendliness	Name first and last name	Name right daytime
Corporate clients / Firmenkunden	Brown, Caroline (310008)	85	48	33	85
	Fox, Steven (310007)	100	40	25	100
	Miller, Kimberly (310006)	100	40	0	100
Service Center	Brown, Caroline (310008)	85	48	33	85
	Fox, Steven (310007)	100	40	25	100
	Miller, Kimberly (310006)	100	40	0	100
Standort Magdeburg Level	Brown, Caroline (310008)	85	48	33	85
	Fox, Steven (310007)	100	40	25	100
	Miller, Kimberly (310006)	100	40	0	100
Standort Magdeburg	Brown, Caroline (310008)	85	48	33	85
	Fox, Steven (310007)	100	40	25	100
	Miller, Kimberly (310006)	100	40	0	100
Team 1 Level	Brown, Caroline (310008)	85	48	33	85
	Fox, Steven (310007)	100	40	25	100
Team 1	Brown, Caroline (310008)	85	48	33	85
	Fox, Steven (310007)	100	40	25	100
Team 2 Level	Miller, Kimberly (310006)	100	40	0	100
Team 2	Miller, Kimberly (310006)	100	40	0	100
Team A	Fox, Steven (310007)	100	40	25	100
	Miller, Kimberly (310006)	100	40	0	100

Color code:
Red lower than 60
Yellow between 60 and 80
Green higher than 80

Fig. 8: Agent comparison - objects (example)

This report template is available on tenant level.

3.1.8 Agent comparison - objects (detailed)

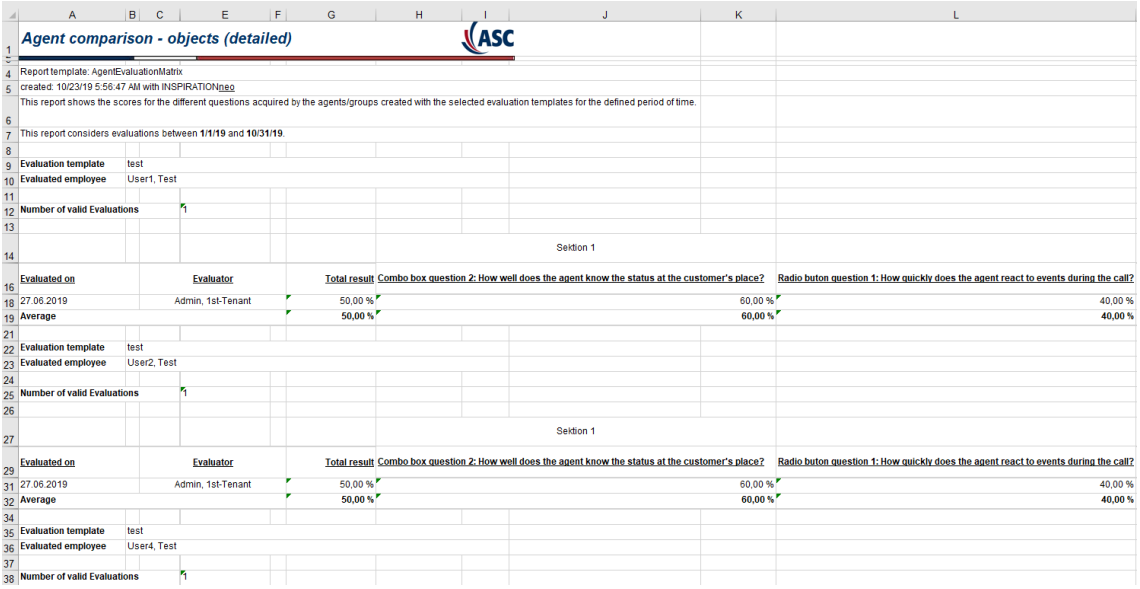
This report displays a table which gives supervisors an overview of how individual agents have developed based on selected questions about the agent and their evaluation or on basis of average values within the selected evaluation period.

Configurable parameters are:

- agents to be evaluated
- evaluation template to be deployed
- evaluation period

The report displays the following information:

Name of the evaluation template, name of the evaluated employee, number of valid evaluations, date when the evaluation was carried out, name of the evaluator, total result in percent, question text, average score of all evaluations.



Agent comparison - objects (detailed)

Report template: AgentEvaluationMatrix
created: 10/23/19 5:56:47 AM with INSPIRATIONneo
This report shows the scores for the different questions acquired by the agents/groups created with the selected evaluation templates for the defined period of time.

This report considers evaluations between **1/1/19** and **10/31/19**.

Evaluation template test
Evaluated employee User1, Test

Number of valid Evaluations 1

Sektion 1

Evaluated on	Evaluator	Total result	Combo box question 2: How well does the agent know the status at the customer's place?	Radio buton question 1: How quickly does the agent react to events during the call?
27.06.2019	Admin, 1st-Tenant	50,00 %	60,00 %	40,00 %
Average		**50,00 %**	**60,00 %**	**40,00 %**

Evaluation template test
Evaluated employee User2, Test

Number of valid Evaluations 1

Sektion 1

Evaluated on	Evaluator	Total result	Combo box question 2: How well does the agent know the status at the customer's place?	Radio buton question 1: How quickly does the agent react to events during the call?
27.06.2019	Admin, 1st-Tenant	50,00 %	60,00 %	40,00 %
Average		**50,00 %**	**60,00 %**	**40,00 %**

Evaluation template test
Evaluated employee User4, Test

Number of valid Evaluations 1

Fig. 9: Agent comparison - objects (detailed) (example)

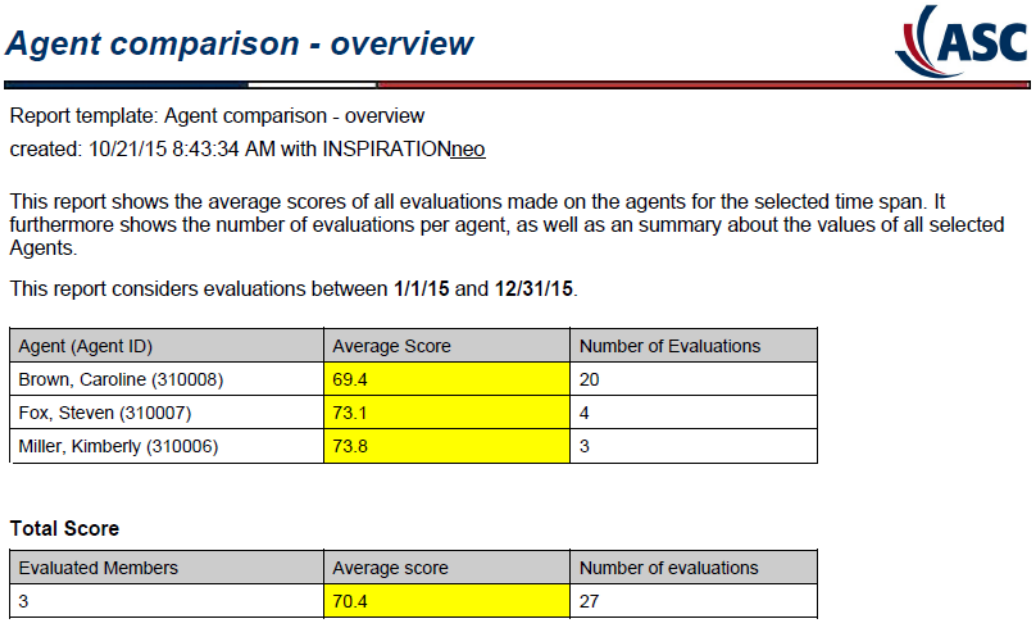
This report template is available on tenant level.

3.1.9 Agent comparison - overview

This report shows an overview of all selected agents. The average evaluation score per agent is calculated on basis of all available evaluations, regardless of the evaluation template. In addition, the number of carried-out evaluations is displayed and, at the end of the report, the average overall score of the selected agents and/or agent groups is calculated and displayed.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. Agents whose evaluation information does not match the configurable parameters are not listed in the report.

This report allows managers of a contact center to get an overview of the current service level based on the performance of the employees, for instance.



Agent comparison - overview

Report template: Agent comparison - overview
created: 10/21/15 8:43:34 AM with INSPIRATIONneo

This report shows the average scores of all evaluations made on the agents for the selected time span. It furthermore shows the number of evaluations per agent, as well as an summary about the values of all selected Agents.

This report considers evaluations between **1/1/15** and **12/31/15**.

Agent (Agent ID)	Average Score	Number of Evaluations
Brown, Caroline (310008)	69.4	20
Fox, Steven (310007)	73.1	4
Miller, Kimberly (310006)	73.8	3

Total Score

Evaluated Members	Average score	Number of evaluations
3	70.4	27

Fig. 10: Agent comparison - overview (example)

This report template is available on tenant level.

3.1.10 Detailed agent evaluation (graphical)

This report compares the average scores of the selected agents and displays them in a bar chart.

The agents are evaluated by means of:

- the results for one or several template(s) (overall),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

Instead of comparing agents, the focus is on the detailed evaluation of individual agents.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. Agents whose evaluation information does not match the configurable parameters are marked with the information *No data*. Remarks, text fields, links, images and question groups are not displayed.

This report can be used as the basis for setting up a training plan for an agent or for a top-down feedback.

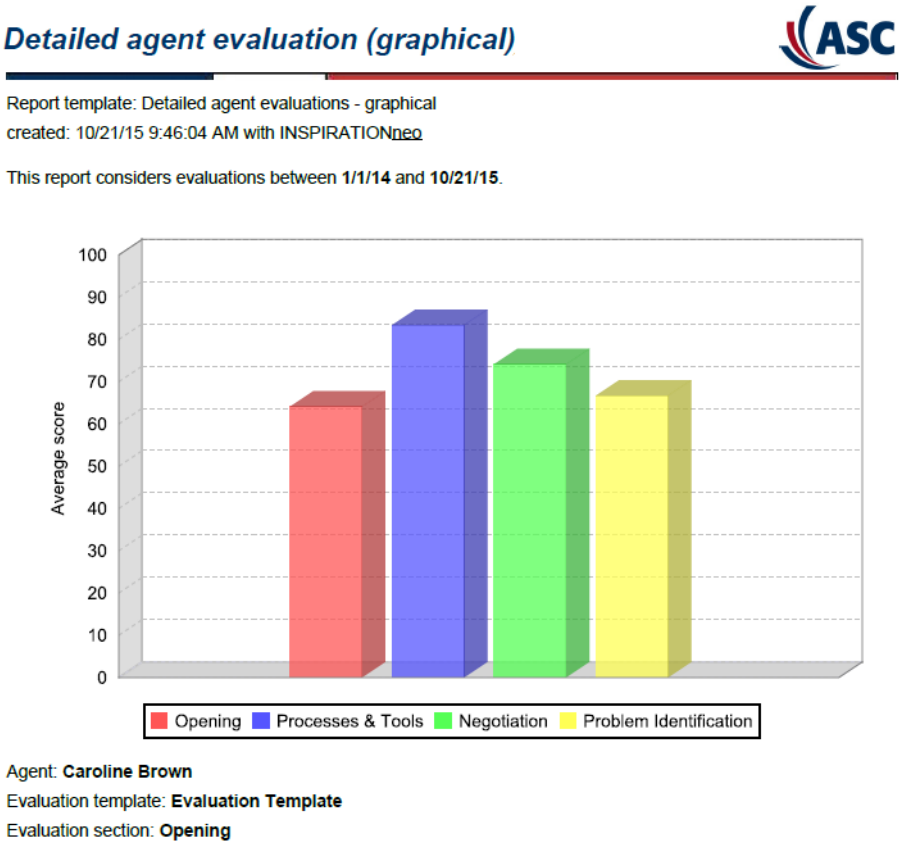


Fig. 11: Detailed agent evaluation - graphical

This report template is available on tenant level.

3.1.11 Detailed agent evaluation (text form)

This report compares the average scores of the selected agents and displays them in a table.

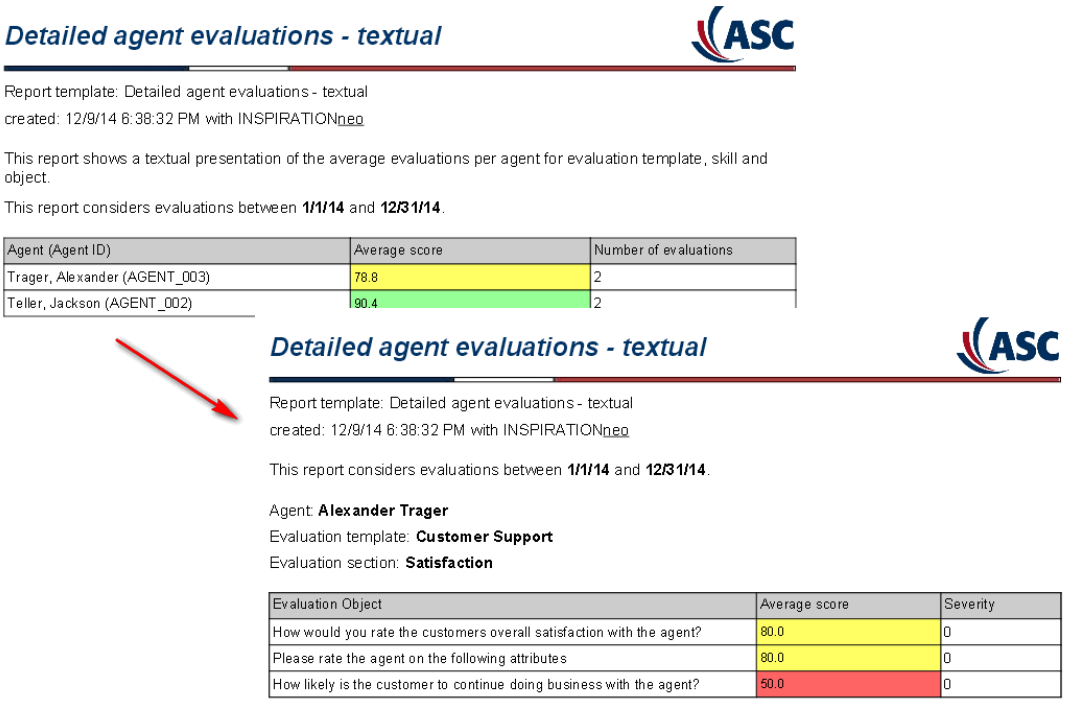
The agents are evaluated by means of:

- the results for one or several template(s) (overall),
- the results for individual skills/sections of the template(s),

- the results for individual question elements/objects of the template(s).

Instead of comparing agents, the focus is on the detailed evaluation of individual agents.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. Agents whose evaluation information does not match the configurable parameters are not listed in the report. Comments, links, images, remarks, lines or question group elements are not displayed in the report. Agents do not necessarily have to belong to an organization unit to be displayed in the report.



Detailed agent evaluations - textual

Report template: Detailed agent evaluations - textual

created: 12/9/14 6:38:32 PM with INSPIRATIONneo

This report shows a textual presentation of the average evaluations per agent for evaluation template, skill and object.

This report considers evaluations between **1/1/14** and **12/31/14**.

Agent (Agent ID)	Average score	Number of evaluations
Trager, Alexander (AGENT_003)	78.8	2
Teller, Jackson (AGENT_002)	90.4	2

Detailed agent evaluations - textual

Report template: Detailed agent evaluations - textual

created: 12/9/14 6:38:32 PM with INSPIRATIONneo

This report considers evaluations between **1/1/14** and **12/31/14**.

Agent: **Alexander Trager**

Evaluation template: **Customer Support**

Evaluation section: **Satisfaction**

Evaluation Object	Average score	Severity
How would you rate the customers overall satisfaction with the agent?	80.0	0
Please rate the agent on the following attributes	80.0	0
How likely is the customer to continue doing business with the agent?	50.0	0

Fig. 12: Detailed agent evaluation - text form

This report template is available on tenant level.

3.2 Group-based reports

3.2.1 Group trend analysis (evaluation time)

This report displays the average score that the selected agent group has achieved within the defined period of time in a line chart. After briefly comparing all selected groups, the focus is on the evaluation results of the individual group.

The group is analyzed by means of:

- the total score - across several templates, if required,
- the results for one or several template(s),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. Organization units whose evaluation information does not match the configurable parameters are not listed in the report. The time axis (x-axis) shows the time when the evaluation was released. The values displayed in the diagram are average values for the day.

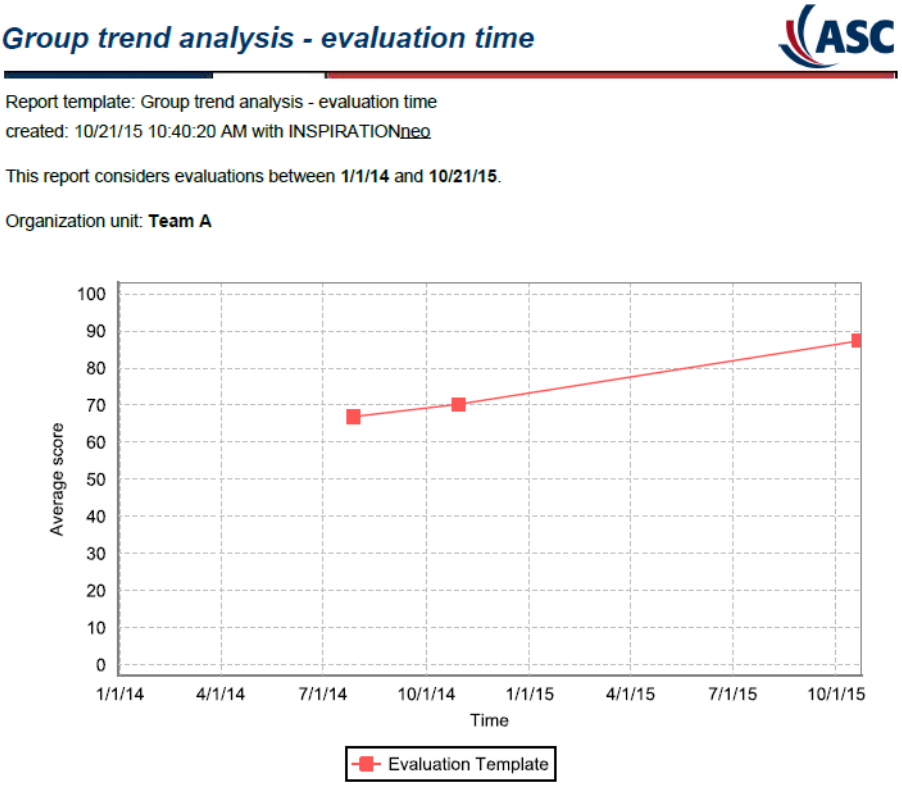


Fig. 13: Group trend analysis - evaluation time (example)

This report template is available on tenant level.

3.2.2 Group trend comparison (evaluation time)

This report displays the average scores that the selected agent groups have achieved within the defined period of time in a line chart. The time axis (x-axis) shows the time when the evaluation was released.

The focus is on comparing the selected groups.

The groups are compared by means of:

- the total score - across several templates, if required,
- the results for one or several template(s),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. Organization units whose evaluation information does not match the configurable parameters are not listed in the report. The values displayed in the diagram are average values for the day.

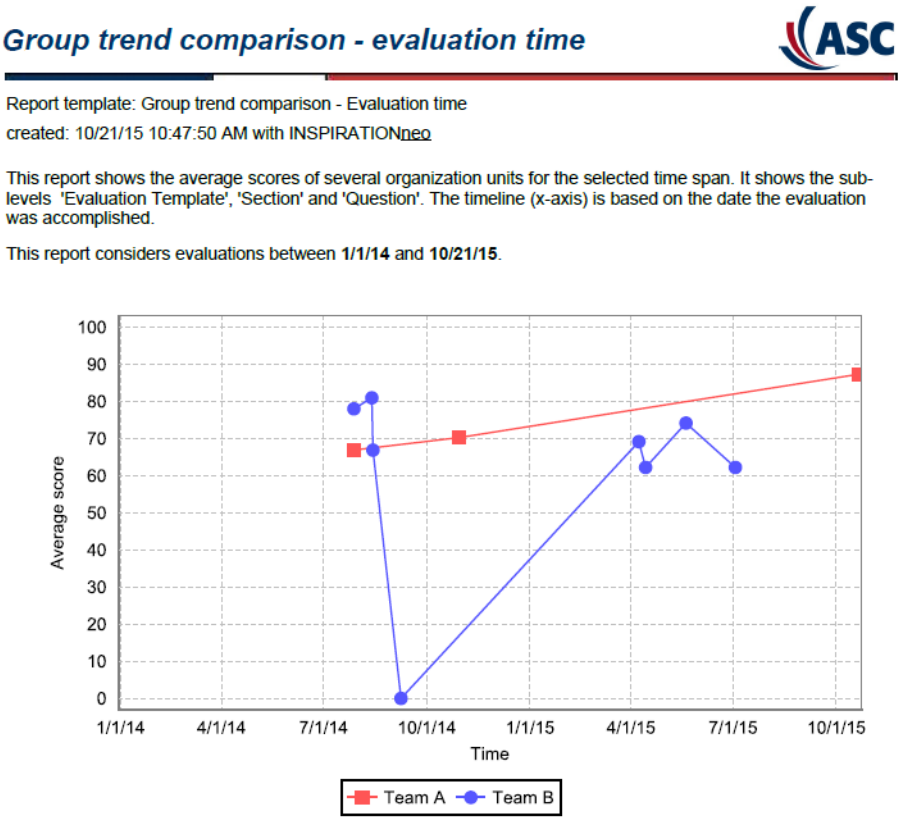


Fig. 14: Group trend comparison - evaluation time (example)

This report template is available on tenant level.

3.2.3 Group trend comparison (session time)

This report displays the average scores that the selected agent groups have achieved within the defined period of time in a line chart. The time axis (x-axis) shows the time when the session corresponding to the evaluation was recorded

The focus is on comparing the selected groups.

The groups are compared by means of:

- the total score - across several templates, if required,
- the results for one or several template(s),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

The report only considers first evaluations and re-evaluations of sessions which have been started within the indicated period of time. Organization units whose evaluation information does not match the configurable parameters are not listed in the report. The values displayed in the diagram are average values for the day.

Group trend comparison - Session time

Report template: Group trend comparison - Session time

created: 04/03/15 08:11:26 with INSPIRATIONneo

This report shows the average scores of several organisation units for the selected time span. It shows the sub-levels 'Evaluation Template', 'Section' and 'Question'. The timeline (x-axis) is based on the date the session was recorded.

This report considers evaluations between **22/02/15** and **04/03/15**.

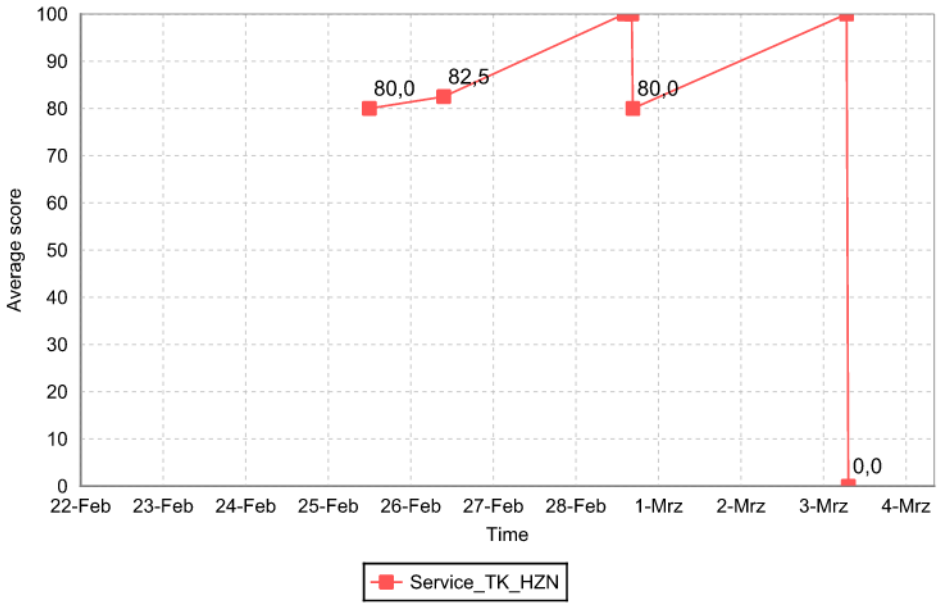


Fig. 15: Group trend comparison - session time (example)

This report template is available on tenant level.

3.2.4 Group comparison - evaluation template

This report compares the average scores that the selected agent groups have achieved in all their evaluations based on the selected template within the defined period of time. In addition, the number of all evaluations within the defined period of time is displayed.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. If an agent belongs to several groups, the agent's evaluations are not counted separately for each organization unit.

Group comparison - evaluation template

Report template: Group comparison - Evaluation template

created: 10/21/15 10:01:59 AM with INSPIRATIONneo

This report shows the average scores and the number of evaluations for each organization unit for the selected time span.

This report considers evaluations between **1/1/14** and **10/21/15**.

Evaluation Template: **Evaluation Template**

Agent Group	Evaluated Members	Average Score	Number of Evaluations
Team A	2	74.8	6
Team B	1	61.7	8

Fig. 16: Group comparison - evaluation template (example)

This report template is available on tenant level.

3.2.5 Group comparison - skills

This report compares the average scores that the selected agent groups have achieved in the evaluation of their skills based on the selected template within the defined period of time.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time.

Group comparison - skills

Report template: Group comparison - Skills

created: 10/21/15 10:30:12 AM with INSPIRATIONneo

This report shows the average scores for the different sections acquired by the organization unit with the selected evaluation template for the selected time span.

This report considers evaluations between **1/1/14** and **10/21/15** and is based on Evaluation Template **Evaluation Template**.

Agent Group / Evaluation Sections	Team A	Team B
Negotiation	72.9	74.1
Opening	65.0	64.0
Problem Identification	77.8	66.7
Processes & Tools	80.8	83.3

Fig. 17: Group comparison - skills (example)

This report template is available on tenant level.

3.2.6 Group comparison - objects

This report compares the average scores that the selected groups have achieved for the different objects of the selected evaluation template(s) within the defined period of time. The focus is on the average scores for the individual evaluation criteria (question objects).

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. If an agent belongs to several groups, the agent's evaluations are not counted separately for each organization unit.

Group comparison - objects

Report template: Group comparison - Objects

created: 10/21/15 10:32:09 AM with INSPIRATIONneo

This report shows the average scores for the different questions acquired by the organization unit with the selected evaluation template for the selected time span.

This report considers evaluations between **1/1/14** and **10/21/15** and is based on Evaluation Template **Evaluation Template**.

Evaluation Section: **Processes & Tools**

Agent Groups \ Evaluation Objects	Processes were met	Effective usage of tools	Effective usage of databases	Correct data entry
Team A	66	60	86	100
Team B	100	50	75	100

Fig. 18: Group comparison - objects (example)

This report template is available on tenant level.

3.2.7 Group comparison - objects (detailed)

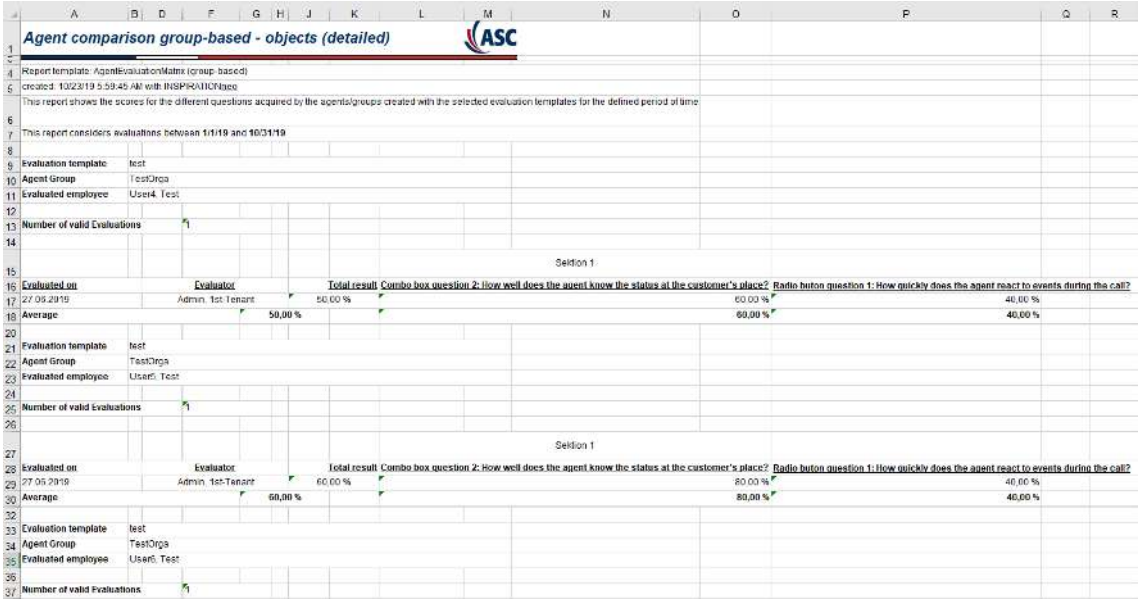
This report displays a table which gives supervisors an overview of how individual agents have developed within their organization unit (group) based on selected questions about the agent and their evaluation or on basis of average values within the selected evaluation period.

Configurable parameters are:

- agents to be evaluated
- evaluation template to be deployed
- evaluation period
- organization unit

The report displays the following information:

Name of the evaluation template, name of the agent group (organization unit), name of the evaluated employee, number of valid evaluations, date when the evaluation was carried out, name of the evaluator, total result in percent, question text, average score of all evaluations.



Agent comparison group-based - objects (detailed)

Report template: AgentEvaluationMatrix (group-based)
created: 10/23/19 5:59:45 AM with INSPIRATIONneo
This report shows the scores for the different questions acquired by the agents/groups created with the selected evaluation templates for the defined period of time

This report considers evaluations between 1/1/19 and 10/31/19

Evaluation template	test
Agent Group	TestOrga
Evaluated employee	User4, Test
Number of valid Evaluations	1

Section 1

Evaluated on	Evaluator	Total result	Combo box question 2: How well does the agent know the status at the customer's place?	Radio buton question 1: How quickly does the agent react to events during the call?
27.06.2019	Admin, 1st Tenant	50,00 %	60,00 %	40,00 %
Average		50,00 %	60,00 %	40,00 %

Evaluation template	test
Agent Group	TestOrga
Evaluated employee	User6, Test
Number of valid Evaluations	1

Section 1

Evaluated on	Evaluator	Total result	Combo box question 2: How well does the agent know the status at the customer's place?	Radio buton question 1: How quickly does the agent react to events during the call?
27.06.2019	Admin, 1st Tenant	60,00 %	80,00 %	40,00 %
Average		60,00 %	80,00 %	40,00 %

Evaluation template	test
Agent Group	TestOrga
Evaluated employee	User6, Test
Number of valid Evaluations	1

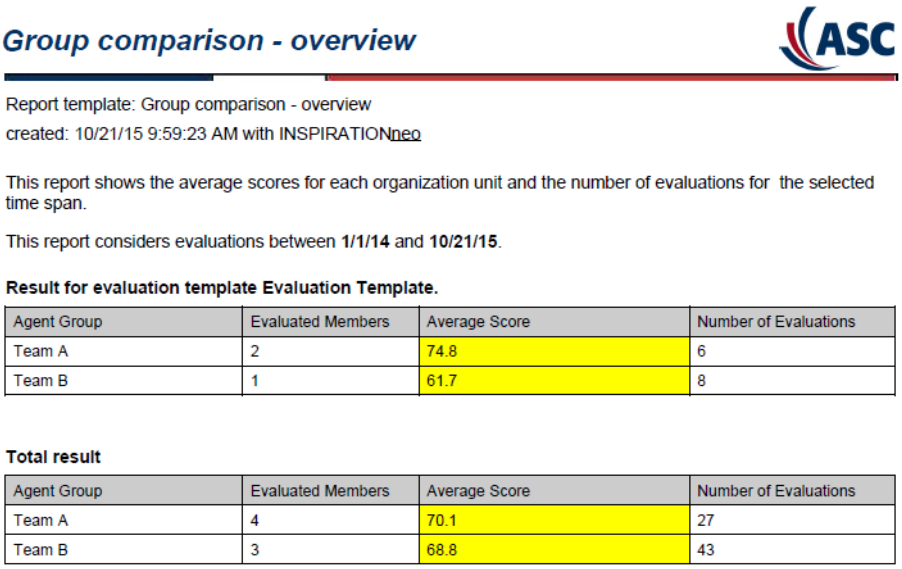
Fig. 19: Agent comparison group-based - objects (detailed)

This report template is available on tenant level.

3.2.8 Group comparison - overview

This report displays the average scores that the selected agent groups have achieved on basis of the selected evaluation template as well as the number of evaluations within the defined period of time. In addition, an overview of all selected templates is displayed.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time. If an agent belongs to several groups, the agent's evaluations are not counted separately for each organization unit.



Group comparison - overview

Report template: Group comparison - overview
created: 10/21/15 9:59:23 AM with INSPIRATIONneo

This report shows the average scores for each organization unit and the number of evaluations for the selected time span.

This report considers evaluations between **1/1/14** and **10/21/15**.

Result for evaluation template Evaluation Template.

Agent Group	Evaluated Members	Average Score	Number of Evaluations
Team A	2	74.8	6
Team B	1	61.7	8

Total result

Agent Group	Evaluated Members	Average Score	Number of Evaluations
Team A	4	70.1	27
Team B	3	68.8	43

Fig. 20: Group comparison - overview (example)

This report template is available on tenant level.

3.2.9 Group comparison - detailed

This report displays the scores that the members of the selected organization units have achieved in the evaluations based on the selected evaluation template and during the defined period of time.

The following parameters are available:

- Organization units (multiple choice possible)
- Evaluation templates (multiple choice possible)
- Evaluation period
- Granularity: Week, month, Year (default: week)
- Evaluation status: only evaluations with the status “Released”; evaluations with the status “Released” and “Agent feedback pending”; evaluations with the status “Released”, “Agent feedback pending” and “Ignored” (default: “Released”)

	A	B	C	D	E	F	G	H	I
1	Group comparison (detailed)								
2									
3	Report template:		Group comparison (detailed)						
4	Creation date:		15.06.2018 07:19:19						
5	Granularity:		Week						
6	This report shows QM values for members of the selected organizational units which were released from 01.01.2018 to 21.01.2018.								
7									
8									
9	QM values for evaluation template								
10	Evaluation template:		Reportevaluationtemplate1						
11									
12	From	To	ReportOrga1 # N/A	ReportOrga1 # not N/A	ReportOrga1 Average	ReportOrga2 # N/A	ReportOrga2 # not N/A	ReportOrga2 Average	
13	01.01.2018	07.01.2018	N/A	N/A	N/A	1	20	95	
14	08.01.2018	14.01.2018	5	10	80	N/A	23	70	
15	15.01.2018	21.01.2018	7	13	75	N/A	N/A	N/A	
16									
17									
18	QM values for sections								
19	Evaluation template:		Reportevaluationtemplate1						
20	Section:		Counselling						
21									
22	From	To	ReportOrga1 # N/A	ReportOrga1 # N/A	ReportOrga1 Average	ReportOrga2 # N/A	ReportOrga2 # N/A	ReportOrga2 Average	
23	01.01.2018	07.01.2018	N/A	N/A	N/A	1	20	70	
24	08.01.2018	14.01.2018	5	10	58	N/A	23	40	
25	15.01.2018	21.01.2018	7	13	65	N/A	N/A	N/A	
26									
27									
28	QM values for sections								
29	Evaluation template:		Reportevaluationtemplate1						
30	Section:		Counselling						
31	Question:		How satisfied was the customer overall with our customer support?						
32									
33	From	To	ReportOrga1 # N/A	ReportOrga1 # N/A	ReportOrga1 Average	ReportOrga2 # N/A	ReportOrga2 # N/A	ReportOrga2 Average	
34	01.01.2018	07.01.2018	N/A	N/A	N/A	1	20	35	
35	08.01.2018	14.01.2018	5	10	40	N/A	23	20	
36	15.01.2018	21.01.2018	7	13	60	N/A	N/A	N/A	

Fig. 21: Group comparison - detailed (example)

This report template is available on tenant level.

3.3 Supervisor-based reports

3.3.1 Supervisor productivity - detailed

This report gives an overview of:

- the total number of all sessions which can be evaluated in the agent group of a specific superior or in a group of superiors,
- the number and the percentage of the evaluated sessions,
- the number of the sessions which have not yet been evaluated.

In addition, the score that the evaluated session has achieved is listed.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time and whose sessions have been recorded within this period as well. In addition, the evaluation must be based on a session. If the agent belongs to several organization units, he will be listed for each organization unit. Only the evaluations and sessions of those agents are considered who belong to the organization units of the selected supervisors.

Supervisor productivity - detailed

Report template: Supervisor productivity - detailed

created: 10/21/15 11:26:59 AM with INSPIRATIONneo

This report shows an overview of the number of all recorded calls available in the organization unit of a certain supervisor or a group of supervisors and the number of already evaluated and not yet evaluated sessions. It furthermore lists each recorded call with additional information (agent, agent group, recording date, evaluation time, name of evaluation template, total score) individually.

This report considers evaluations between **1/1/15** and **12/31/15**.

Productivity overview for supervisor Bond, James (007) based on organizational unit Corporate clients / Firmenkunden.

Number of sessions: **7**

Number of Evaluated Sessions: **2**

Number of not evaluated sessions: **5**

Evaluated percentage: **28.57 %**

Agent (AgentID)	Recording Date	Evaluation Date	Name of Evaluation Template	Total Score
Brown, Caroline (310008)	3/20/15 7:49 AM	10/21/15 9:03 AM	Evaluation Template	88.2
Fox, Steven (310007)	3/20/15 7:33 AM	10/21/15 9:05 AM	Evaluation Template	78.9

Productivity overview for supervisor Bond, James (007) based on organizational unit Service Center.

Number of sessions: **14**

Number of Evaluated Sessions: **4**

Number of not evaluated sessions: **10**

Evaluated percentage: **28.57 %**

Agent (AgentID)	Recording Date	Evaluation Date	Name of Evaluation Template	Total Score
Brown, Caroline (310008)	3/20/15 7:49 AM	10/21/15 9:03 AM	Evaluation Template	88.2
Fox, Steven (310007)	3/20/15 7:33 AM	10/21/15 9:05 AM	Evaluation Template	78.9
Müller, Anneliese (310002)	3/20/15 7:59 AM	10/21/15 9:07 AM	Evaluation Template	90.4
Sauer, Frida (310003)	3/20/15 8:03 AM	10/21/15 9:09 AM	Evaluation Template	83.6

Fig. 22: Supervisor productivity - detailed (example)

This report template is available on tenant level.

3.3.2 Supervisor productivity - overview

This report provides an evaluation of the productivity of supervisors. The overall number of the sessions which can be evaluated, the number of the already evaluated sessions and the number of the sessions which have not yet been evaluated are listed.

The report only considers first evaluations and re-evaluations which have been released within the indicated period of time and whose sessions have been recorded within this period as well. In addition, the evaluation must be based on a session. Only the evaluations and sessions of those agents are considered who belong to the organization units of the selected supervisors.

Supervisor productivity - overview

Report template: Supervisor productivity - overview

created: 10/21/15 11:28:37 AM with INSPIRATIONneo

This report shows a list of the supervisor/s including the total number of sessions and the number of sessions already evaluated and not yet evaluated.

This report considers evaluations between **1/1/15** and **12/31/15**.

Supervisor (Supervisor ID)	Number of Sessions to Evaluate	Number of Evaluated Sessions	Number of not Evaluated Sessions	Evaluated Percentage
Bond, James (007)	15	7	8	46.67 %
Boss, Peter (310009)	14	6	8	42.86 %

Fig. 23: Supervisor productivity - overview (example)

This report template is available on tenant level.

3.3.3 Supervisor productivity - overview (graphical)

This report features a bar chart displaying the number of sessions that selected supervisors have already evaluated in comparison to the sessions which have not yet been evaluated within a specified period of time.

Supervisor productivity - graphical

Report template: Supervisor productivity - overview (graphical View)

created: 10/21/15 10:57:52 AM with INSPIRATIONneo

This report shows a graphical summary of supervisors including the total amount of evaluated and not evaluated sessions.

This report considers evaluations and sessions between **1/1/14** and **10/21/15**.

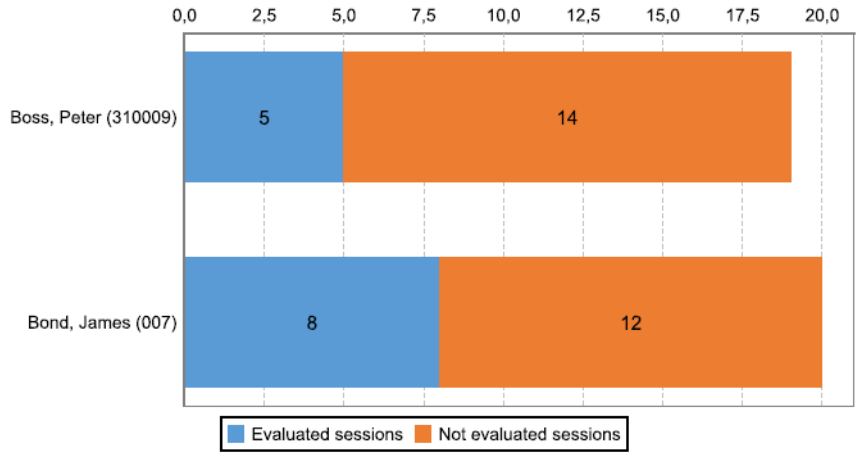


Fig. 24: Supervisor productivity - graphical (example)

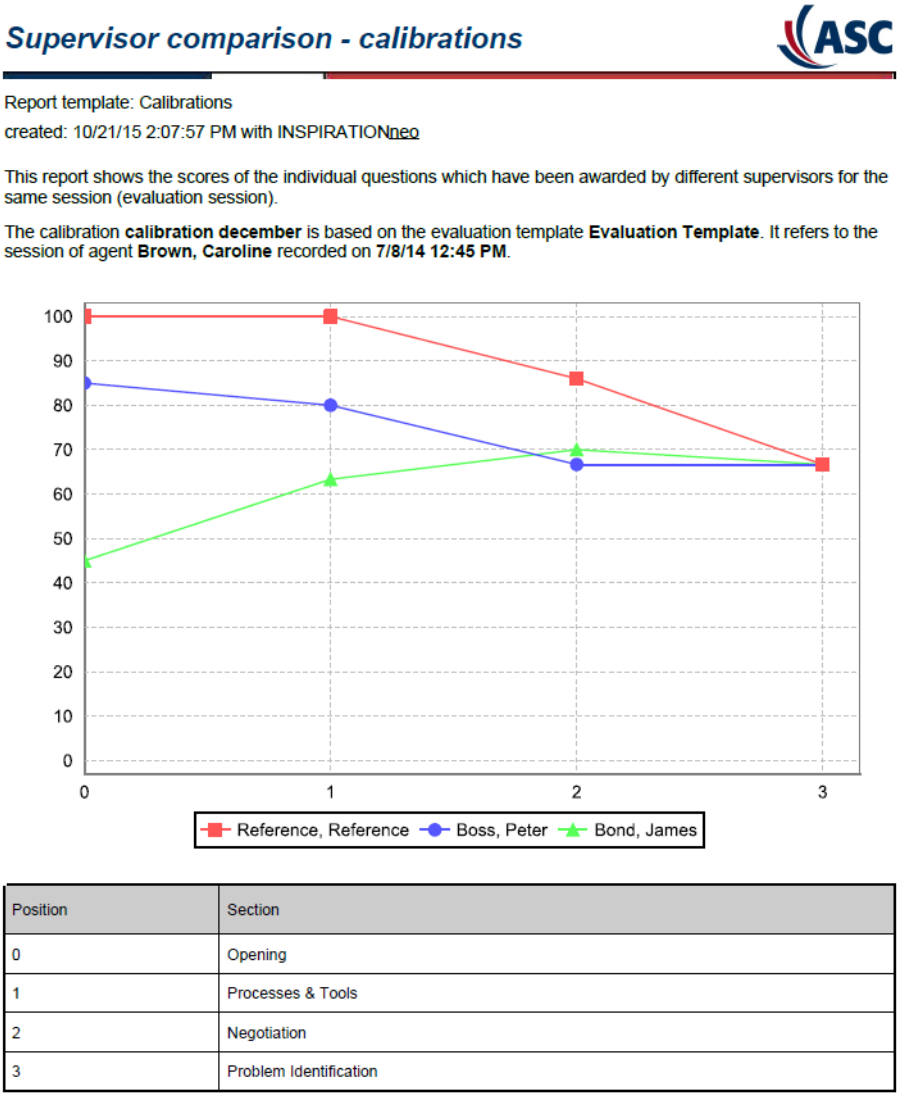
This report template is available on tenant level.

3.3.4 Supervisor comparison - calibrations (line chart)

This report displays the calibration evaluations of different supervisors in a line chart and thus allows comparing to which extent they coincide or differ. If a reference evaluation is available, it is displayed as a line in the chart as well.

The supervisors are compared by means of:

- the results for one or several template(s) (overall),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).



Supervisor comparison - calibrations

Report template: Calibrations

created: 10/21/15 2:07:57 PM with INSPIRATIONneo

This report shows the scores of the individual questions which have been awarded by different supervisors for the same session (evaluation session).

The calibration **calibration december** is based on the evaluation template **Evaluation Template**. It refers to the session of agent **Brown, Caroline** recorded on **7/8/14 12:45 PM**.

Position	Section
0	Opening
1	Processes & Tools
2	Negotiation
3	Problem Identification

Fig. 25: Calibrations (example)

This report template is available on tenant level.

3.3.5 Supervisor comparison - calibrations (bar chart)

This report compares the average scores of the supervisors who have been assigned to the selected calibration session in a bar chart.

The report considers all released evaluations which correspond to the selected calibration. The evaluation must have been released within the indicated period of time. Agents whose evaluation information does not match the configurable parameters are not listed in the report. Comments, links, images, remarks, lines or question group elements are not displayed in the report, neither are questions and sections with the evaluation N/A. Agents do not necessarily have to belong to an organization unit to be displayed in the report. The score limit refers to the overall result of the evaluation, not to the scores of individual questions or sections.

The supervisors are compared by means of:

- the results for one or several template(s) (overall),

- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

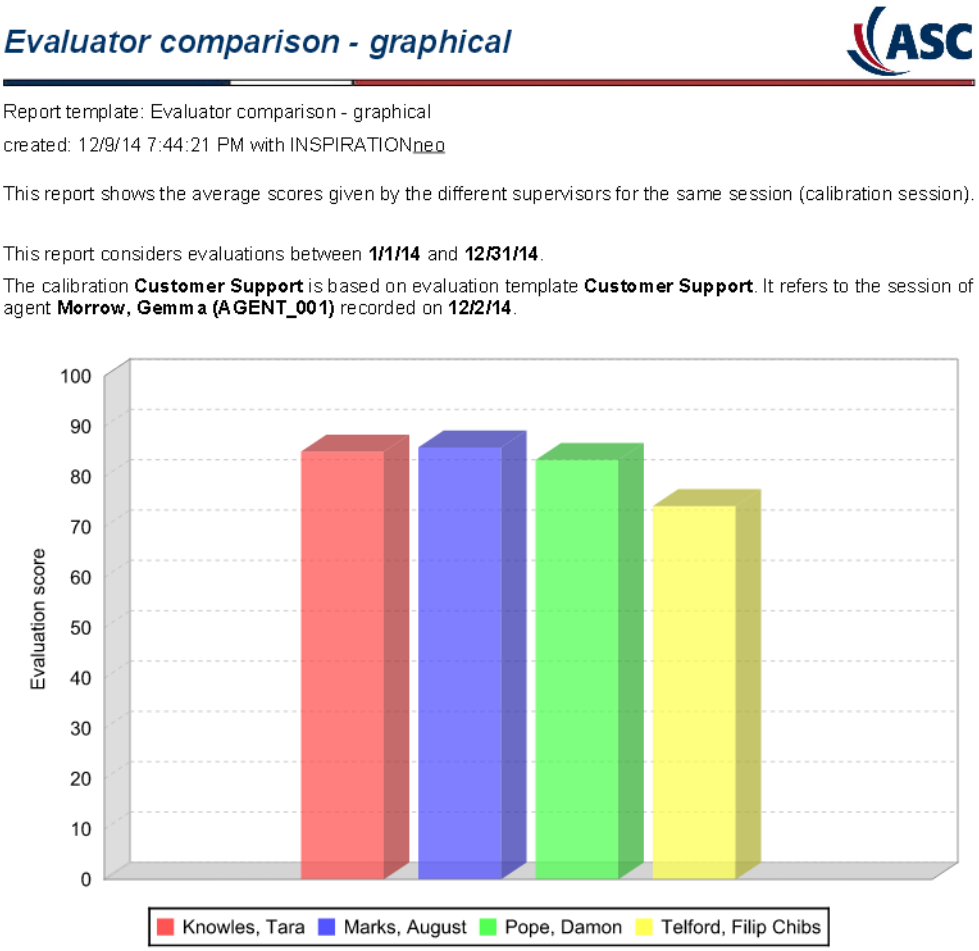


Fig. 26: Supervisor comparison calibrations - graphical (example)

This report template is available on tenant level.

3.4 E-learning reports

3.4.1 Agent comparison - quiz template

This report compares the average scores that the selected agents have achieved in the quizzes within the defined period of time. The results based on the selected quiz template, its sections (skills) and question elements (objects) are considered.

The agents are compared by means of:

- the results for one or several quiz template(s) (overall),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

Agent comparison - quiz results

Report template: Agent comparison - Quiz template

created: 8/14/15 10:38:04 AM with INSPIRATIONneo

This report shows the average score of different agents over the course of the indicated period. It contains the sections 'Quiz template', 'Section', and 'Question'.

This report considers quizzes between **1/1/14** and **12/31/14**.

Agent \ Quiz Template	Prozessuale Kompetenz und Dialogberatung
Trager, Alexander	76.0
Morrow, Gemma	84.0

Fig. 27: Agent comparison - quiz results (example)

This report template is available on tenant level.

3.4.2 Group comparison - quiz template

This report compares the average scores that the selected agent groups have achieved in the quizzes within the defined period of time. The results based on the selected quiz template, its sections (skills) and question elements (objects) are considered.

The agent groups are compared by means of:

- the results for one or several quiz template(s) (overall),
- the results for individual skills/sections of the template(s),
- the results for individual question elements/objects of the template(s).

Only quizzes with the status *Finalized* are considered.

Group comparison - quiz results

Report template: Group comparison - Quiz template

created: 8/14/15 10:38:41 AM with INSPIRATIONneo

This report shows the average score of the different organization units over the course of the indicated period. It contains the sections 'Quiz template', 'Section', and 'Question'.

This report considers quizzes between **1/1/14** and **12/31/14**.

Quiz Template / Organization Unit	Prozessuale Kompetenz und Dialogberatung
VKS_DB_INBOUND	80.0
VKS_HOTL_TS_OST	76.0

Fig. 28: Group comparison - quiz results (example)

This report template is available on tenant level.

3.4.3 Training progress

This report displays the development of the average evaluation scores and quiz scores that the selected agents have achieved within the defined period of time in a line chart.

In addition, the name of the training packages and the date when it has taken place are displayed.

Training progress

Report template: Training Progress
created: 8/14/15 10:39:14 AM with INSPIRATIONneo

This report shows the history of the average evaluation scores and quiz scores in relation to the training packages.

This report considers evaluations, quizzes and training packages between **1/1/14** and **12/31/14**.

Agent: **Sylvia Schneider**

Training packages

Date	Training Package
9/10/15 2:59 PM	Trainings Paket

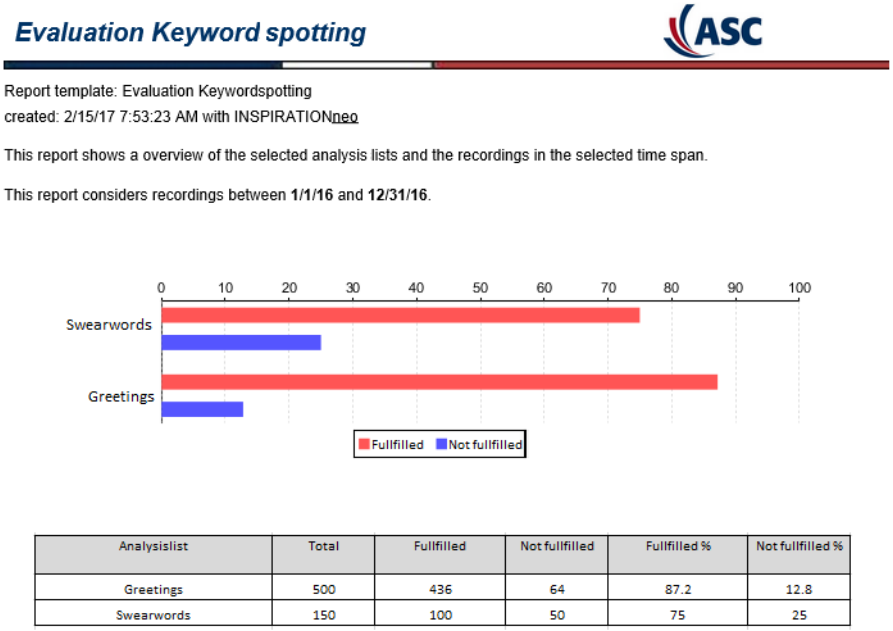
Fig. 29: Training progress (example)

This report template is available on tenant level.

3.5 Analysis reports

3.5.1 Evaluation keyword spotting

This report displays the number of calls which do (*Fulfilled*) or do not contain (*Not fulfilled*) keywords of the selected analysis list(s) as well as the percentage they constitute in all calls. Available parameters are an individually selectable considered period as well as the multiple selection of keyword lists, agents and organization units. The results are displayed in a bar chart and in a table in which the selected keyword lists are displayed in the column *Evaluation criterion*.



Evaluation Keyword spotting

Report template: Evaluation Keywordspotting
created: 2/15/17 7:53:23 AM with INSPIRATIONneo

This report shows a overview of the selected analysis lists and the recordings in the selected time span.

This report considers recordings between **1/1/16** and **12/31/16**.

Analysislist	Total	Fullfilled	Not fullfilled	Fullfilled %	Not fullfilled %
Greetings	500	436	64	87.2	12.8
Swearwords	150	100	50	75	25

Fig. 30: Assessment keyword analysis (example)

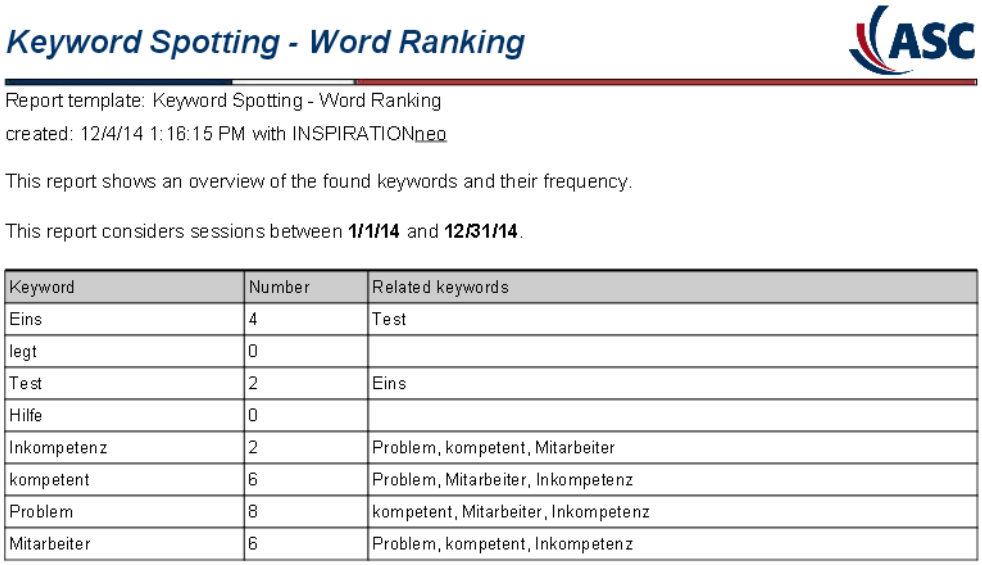
This report template is available on tenant level.

3.5.2 Speech analysis - Word ranking

This report features a table with the keywords found in the conversations within a certain period of time, their frequency as well as related keywords.

To have results displayed in the report, a corresponding audio analysis job must have been created.

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



Keyword Spotting - Word Ranking

Report template: Keyword Spotting - Word Ranking
created: 12/4/14 1:16:15 PM with INSPIRATIONneo

This report shows an overview of the found keywords and their frequency.

This report considers sessions between **1/1/14** and **12/31/14**.

Keyword	Number	Related keywords
Eins	4	Test
legt	0	
Test	2	Eins
Hilfe	0	
Inkompetenz	2	Problem, kompetent, Mitarbeiter
kompetent	6	Problem, Mitarbeiter, Inkompetenz
Problem	8	kompetent, Mitarbeiter, Inkompetenz
Mitarbeiter	6	Problem, kompetent, Inkompetenz

Fig. 31: Keyword spotting - frequency (example)

This report template is available on tenant level.

3.5.3 Time difference of process duration

The report shows the evolution of the average duration that agents required for a certain process in comparison with the configured maximum duration of the process within the defined period of time. The y-axis indicates the configured maximum process duration in the time unit selected during the creation of the report template while the x-axis indicated the considered period.

Configurable parameters are:

- the SCREEN*miner* process
- the process duration cap
- the time unit
- the considered period

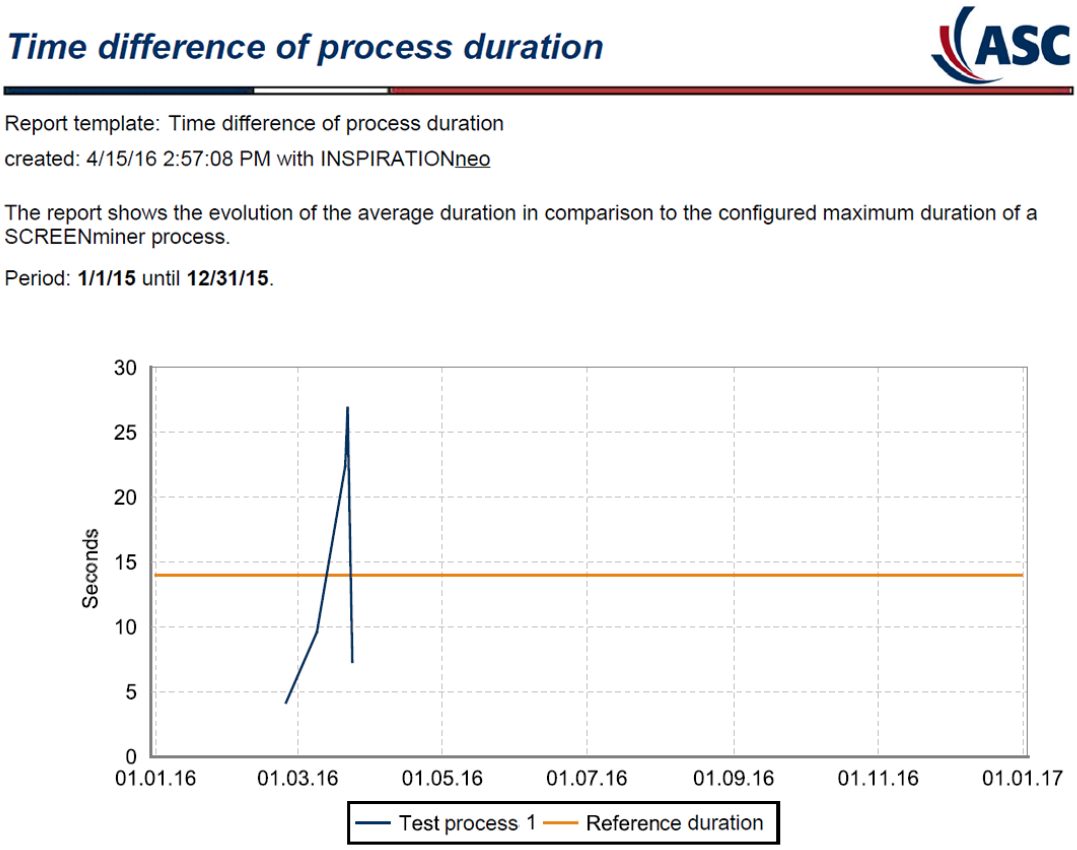


Fig. 32: Time difference of process duration (example)

This report template is available on tenant level.

3.5.4 Speech analytics - categories

This report features a pie chart displaying how many keywords from which analysis lists (categories) have been found.

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

Configurable parameters are:

- the keyword list
- the considered period

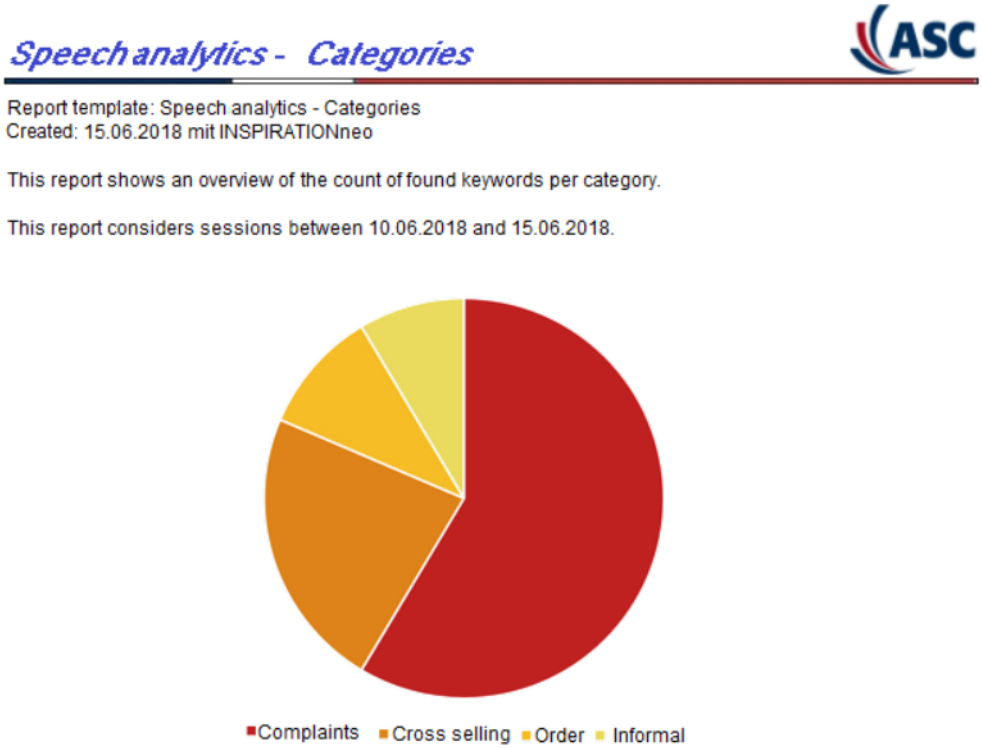


Fig. 33: Speech analytics - categories (example)

This report template is available on tenant level.

3.5.5 KWS statistics

This report displays all sessions which have already been analyzed and which still have to be analyzed on a daily basis. Furthermore, the number of sessions assigned to each category existing in the system is indicated. This allows sorting the sessions systematically.

	A	B	C	D	E	F	G	H	I	J
1	KWS Statistics									
2	Report Template: KWS statistics									
3	Created: 23.10.19 06:07:05 with INSPIRATIONneo,									
4	This report shows the count of all analyzed and not analyzed sessions per day. It also shows all categorized sessions per category.									
5	Analyzed sessions:,35									
6	,									
7	Creation Date,Not Analyzed									
8	01.10.2019,10									
9	,									
10	Category Name,Count by Category									
11	Category1,35									
12	Category2,10									
13										

Fig. 34: KWS statistics (example)

This report template is available on tenant level.

3.6 Other reports

3.6.1 Deleted call info - agent

This report shows the number of calls and sessions which have been deleted manually by the selected agent within the defined period of time. The chart individually displays INSPIRATION*neo* and CLIENT*command*.

Deleted call information - agent

Report template: Deleted Call Infos - Agent
created: 10/21/15 2:32:09 PM with INSPIRATIONneo

This report shows the manually deleted calls and sessions of the selected agents divided into CLIENTcommand and INSPIRATIONneo.

This report shows the number of manually deleted sessions between **1/1/15** and **12/31/15**.

Miller, Kimberly

Deleted by **INSPIRATION**neo:	**0**
Deleted by **CLIENT**command:	**0**

Fox, Steven

Deleted by **INSPIRATION**neo:	**0**
Deleted by **CLIENT**command:	**0**

Brown, Caroline

Deleted by **INSPIRATION**neo:	**1**
Deleted by **CLIENT**command:	**0**

Overview:

Deleted by **INSPIRATION**neo:	**1**
Deleted by **CLIENT**command:	**0**

Fig. 35: Information about deleted calls - agent (example)

This report template is available on tenant level.

3.6.2 Deleted call info - agent (graphical)

This report shows the number of calls and sessions which have been deleted manually by the selected agent within the defined period of time in a pie chart. The chart individually displays INSPIRATION*neo* and CLIENT*command*.

Deleted Call Infos - graphical

Report template: Deleted Call Infos Graphical - Agent
created: 12/5/14 7:57:17 AM with INSPIRATIONneo

This report considers deleted sessions between **1/1/14** and **12/31/14**.

Agent: **Morrow, Gemma**

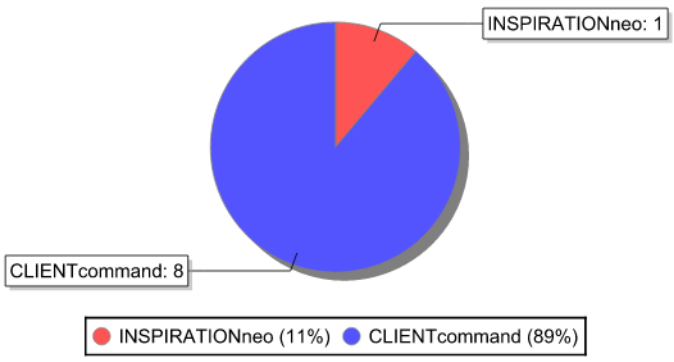


Fig. 36: Information about deleted calls - agent- graphical (example)

This report template is available on tenant level.

3.6.3 Deleted call info - agent group detailed

This report shows the number of the manually deleted calls and sessions of the individual agents of the selected agent groups within the defined period of time. The chart individually displays INSPIRATION*neo* and CLIENT*command*.

Deleted call information - agent group (detailed)

Report template: Deleted Call Infos - Agentgroup - detailed
created: 10/21/15 2:39:05 PM with INSPIRATIONneo

This report shows the manually deleted calls and sessions of the selected organization units divided into CLIENTcommand and INSPIRATIONneo for the individual employees.

This report considers deleted sessions between **1/1/15** and **12/31/15**.

Organization unit: **Team B**

PDM-Admin, 2nd-Tenant (Supervisor)

Deleted by **INSPIRATION**neo:	**0**
Deleted by **CLIENT**command:	**0**

Müller, Anneliese (Agent)

Deleted by **INSPIRATION**neo:	**0**
Deleted by **CLIENT**command:	**0**

Brown, Caroline (Agent)

Deleted by **INSPIRATION**neo:	**1**
Deleted by **CLIENT**command:	**0**

Müller, Peter (Agent)

Deleted by **INSPIRATION**neo:	**0**
Deleted by **CLIENT**command:	**0**

Overview: Team B

Deleted by **INSPIRATION**neo:	**1**
Deleted by **CLIENT**command:	**0**

Fig. 37: Information about deleted calls - agent group - detailed

This report template is available on tenant level.

3.6.4 Deleted call info - agent group overview

This report shows the number of the manually deleted calls and sessions of the selected agent groups within the defined period of time. The chart individually displays INSPIRATION*neo* and CLIENT*command*.

Deleted call information - agent group (overview)

Report template: Deleted Call Infos - Agentgroup - overview
created: 10/21/15 2:37:10 PM with INSPIRATIONneo

This report shows the manually deleted calls and sessions of the selected organization units divided into CLIENTcommand and INSPIRATIONneo.

This report considers deleted sessions between **1/1/15** and **12/31/15**.

Organization unit: Team A

Deleted by **INSPIRATION**neo:	**0**
Deleted by **CLIENT**command:	**0**

Organization unit: Team B

Deleted by **INSPIRATION**neo:	**1**
Deleted by **CLIENT**command:	**0**

Overview:

Deleted by **INSPIRATION**neo:	**1**
Deleted by **CLIENT**command:	**0**

Fig. 38: Information about deleted calls - agent group - overview (example)

This report template is available on tenant level.

3.6.5 Tenant-specific system usage

This report gives ASC an overview of the tenant-specific system usage at the moment when the report is created. It serves ASC for invoicing CSSP systems. Among other parameters, this report displays the storage space usage as well as the number of licenses and extensions that have been assigned to this tenant.

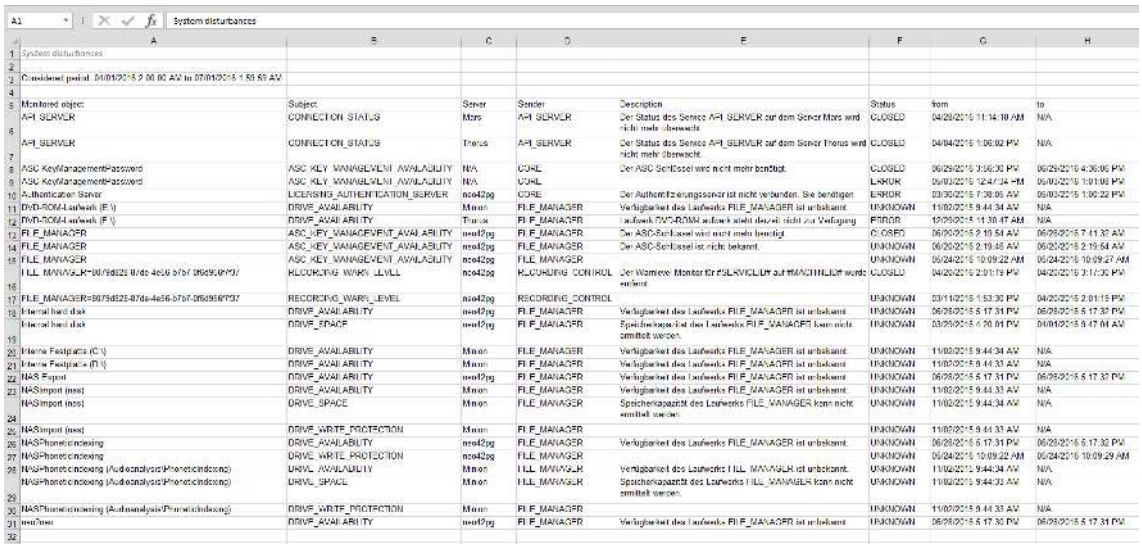
This report is available on system provider level.

3.6.6 System disturbances voice recording

This report displays the entries in the database within the defined period of time in a list and thus gives an overview of all monitored objects with an error message or a warning. The following columns are displayed in the report: Monitored object, subject, server, sender, description, status, and the duration of the disturbance.

The data for the report is only available for the keep period configured for the notification in the Notifications module in the System Configuration.

For basic information about the Notifications module refer to the administration manual for tenants *Notifications module*.



System disturbances

Considered period: 04/01/2015 2:00:00 AM to 07/01/2015 1:59:59 AM

Monitored object	Subject	Server	Sender	Description	Status	from	to
API_SERVER	CONNECTION_STATUS	Mars	API_SERVER	Der Status des Service API_SERVER auf dem Server Mars wird nicht mehr überwacht.	CLOSED	04/28/2015 11:14:18 AM	N/A
API_SERVER	CONNECTION_STATUS	Thorus	API_SERVER	Der Status des Service API_SERVER auf dem Server Thorus wird nicht mehr überwacht.	CLOSED	04/04/2015 1:06:02 PM	N/A
ASC KeyManagementPassword	ASC_KEY_MANAGEMENT_AVAILABILITY	N/A	CORE	Der ASC Schlüssel wird nicht mehr benötigt.	CLOSED	06/29/2015 3:06:30 PM	06/29/2015 4:36:06 PM
ASC KeyManagementPassword	ASC_KEY_MANAGEMENT_AVAILABILITY	N/A	CORE		ERROR	06/03/2015 12:47:34 PM	06/03/2015 1:01:06 PM
Authentication Server	LICENSING_AUTHENTICATION_SERVER	neo42pg	CORE	Der Authentifizierungsserver ist nicht verbunden. Sie benötigen	ERROR	03/30/2015 7:36:06 AM	06/03/2015 1:00:22 PM
DVD-ROM-Laufwerk (E:\)	DRIVE_AVAILABILITY	Mnon	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	11/02/2015 9:44:34 AM	N/A
DVD-ROM-Laufwerk (E:\)	DRIVE_AVAILABILITY	Thorus	FILE_MANAGER	Laufwerk DVD-ROM auf ws4 nicht derzeit nicht zur Verfügung	ERROR	12/05/2015 11:30:47 AM	N/A
FILE_MANAGER	ASC_KEY_MANAGEMENT_AVAILABILITY	neo42pg	FILE_MANAGER	Der ASC-Schlüssel wird nicht mehr benötigt	CLOSED	06/30/2015 2:19:54 AM	06/30/2015 7:41:32 AM
FILE_MANAGER	ASC_KEY_MANAGEMENT_AVAILABILITY	neo42pg	FILE_MANAGER	Der ASC-Schlüssel ist nicht bekannt.	UNKNOWN	06/30/2015 2:19:45 AM	06/30/2015 2:19:54 AM
FILE_MANAGER	ASC_KEY_MANAGEMENT_AVAILABILITY	neo42pg	FILE_MANAGER		UNKNOWN	06/24/2015 10:09:22 AM	06/24/2015 10:09:27 AM
FILE_MANAGER=8079d825-87de-4e56-b7b7-0f6d96f7f37	RECORDING_WARN_LEVEL	neo42pg	RECORDING_CONTROL	Der Warnlevel Monitor für #SLEVICLDF auf #MACHINE_DF wurde entfernt.	CLOSED	04/20/2015 2:01:19 PM	04/20/2015 3:17:30 PM
FILE_MANAGER=8079d825-87de-4e56-b7b7-0f6d96f7f37	RECORDING_WARN_LEVEL	neo42pg	RECORDING_CONTROL		UNKNOWN	03/11/2015 1:53:30 PM	04/20/2015 2:01:19 PM
Internal hard disk	DRIVE_AVAILABILITY	neo42pg	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	06/28/2015 5:17:31 PM	06/28/2015 5:17:32 PM
Internal hard disk	DRIVE_SPACE	neo42pg	FILE_MANAGER	Speicherkapazität des Laufwerks FILE_MANAGER kann nicht ermittelt werden.	UNKNOWN	03/26/2015 4:20:01 PM	04/01/2015 9:47:01 AM
Interne Festplatte (C:\)	DRIVE_AVAILABILITY	Mnon	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	11/02/2015 9:44:34 AM	N/A
Interne Festplatte (D:\)	DRIVE_AVAILABILITY	Mnon	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	11/02/2015 9:44:33 AM	N/A
NAS Export	DRIVE_AVAILABILITY	neo42pg	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	06/28/2015 5:17:31 PM	06/28/2015 5:17:32 PM
NASimport (nas)	DRIVE_AVAILABILITY	Mnon	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	11/02/2015 9:44:33 AM	N/A
NASimport (nas)	DRIVE_SPACE	Mnon	FILE_MANAGER	Speicherkapazität des Laufwerks FILE_MANAGER kann nicht ermittelt werden.	UNKNOWN	11/02/2015 9:44:34 AM	N/A
NASimport (nas)	DRIVE_WRITE_PROTECTION	Mnon	FILE_MANAGER		UNKNOWN	11/02/2015 9:44:33 AM	N/A
NASPhonetic\indexing	DRIVE_AVAILABILITY	neo42pg	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	06/28/2015 5:17:31 PM	06/28/2015 5:17:32 PM
NASPhonetic\indexing	DRIVE_WRITE_PROTECTION	neo42pg	FILE_MANAGER		UNKNOWN	06/24/2015 10:09:22 AM	06/24/2015 10:09:29 AM
NASPhonetic\indexing (Audioanalyse\Phonetic\indexing)	DRIVE_AVAILABILITY	Mnon	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	11/02/2015 9:44:34 AM	N/A
NASPhonetic\indexing (Audioanalyse\Phonetic\indexing)	DRIVE_SPACE	Mnon	FILE_MANAGER	Speicherkapazität des Laufwerks FILE_MANAGER kann nicht ermittelt werden.	UNKNOWN	11/02/2015 9:44:33 AM	N/A
NASPhonetic\indexing (Audioanalyse\Phonetic\indexing)	DRIVE_WRITE_PROTECTION	Mnon	FILE_MANAGER		UNKNOWN	11/02/2015 9:44:33 AM	N/A
neo2new	DRIVE_AVAILABILITY	neo42pg	FILE_MANAGER	Verfügbarkeit des Laufwerks FILE_MANAGER ist unbekannt.	UNKNOWN	06/28/2015 5:17:30 PM	06/28/2015 5:17:31 PM

Fig. 39: System disturbances in voice recording (example)

This report is available on system provider level.

3.6.7 Audit log

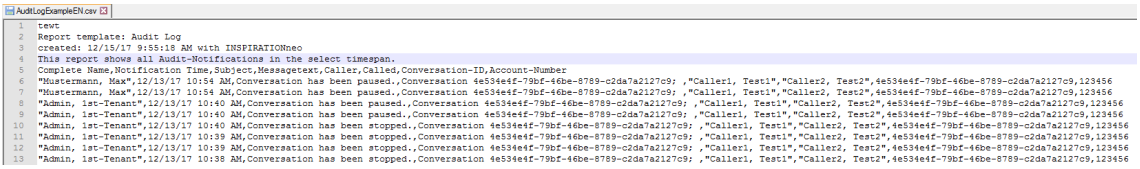
This report displays the following audit notifications issued within the defined period of time in a CSV file.

Subject	Description	Displayed additional data
Login and Logout		
EMPLOYEE_LOGIN	The employee *name* has logged in to the application *ASC application* from the *IP address* or *server name*.	Employee, message text
EMPLOYEE_LOGOUT	The employee *name* has logged off from the application *ASC application* from the *IP address* or *server name*.	Employee, message text
Conversation view		
CONVERSATION_SEARCH	The search criteria that the user has searched are displayed.	Employee, message text
CONVERSATION_REPLAY	The conversation *conversation* has been replayed by user.	Employee, message text, numbers of calling and called party in separate fields
CONVERSATION_SAVEASWAVE	The conversation *conversation* has been saved as WAVE file by user.	Employee, message text, numbers of calling and called party in separate fields
Participant View		
CONVERSATION_ PARTICIPANT_VIEW_SEARCH	The search criteria that the user has searched are displayed.	Employees
CONVERSATION_ PARTICIPANT_VIEW_REPLAY	The conversation part *conversation* has been replayed by user in the participant view.	Employee, message text, all participants of this conversation separated by commas in the same field

Subject	Description	Displayed additional data
CONVERSATION_ PARTVIEW_SAVEASWAVE	The conversation part conversation has been saved as WAVE file by user from the participant view.	Employee, message text

Precondition is that the respective notifications have been activated in the application System Configuration in the Notifications module.

This report contains the following parameters: Name of the employee, the date and time when the interaction has been logged, subject, text of the notification, calling party (if captured with *neo*, the name is displayed, otherwise the phone number/extension), called party (if captured with *neo*, the name is displayed, otherwise the phone number/extension), conversation ID as well as account details.



```
AuditLogExampleEN.csv
1  tewt
2  Report template: Audit Log
3  created: 12/15/17 9:55:18 AM with INSPIRATIONneo
4  This report shows all Audit-Notifications in the select timespan.
5  Complete Name,Notification Time,Subject,Messagetext,Caller,Called,Conversation-ID,Account-Number
6  "Mustermann, Max",12/13/17 10:54 AM,Conversation has been paused.,Conversation 4e534e4f-79bf-46be-8789-c2da7a2127c9; ,"Caller1, Test1","Caller2, Test2",4e534e4f-79bf-46be-8789-c2da7a2127c9,123456
7  "Mustermann, Max",12/13/17 10:54 AM,Conversation has been paused.,Conversation 4e534e4f-79bf-46be-8789-c2da7a2127c9; ,"Caller1, Test1","Caller2, Test2",4e534e4f-79bf-46be-8789-c2da7a2127c9,123456
8  "Admin, 1st-Tenant",12/13/17 10:40 AM,Conversation has been paused.,Conversation 4e534e4f-79bf-46be-8789-c2da7a2127c9; ,"Caller1, Test1","Caller2, Test2",4e534e4f-79bf-46be-8789-c2da7a2127c9,123456
9  "Admin, 1st-Tenant",12/13/17 10:40 AM,Conversation has been paused.,Conversation 4e534e4f-79bf-46be-8789-c2da7a2127c9; ,"Caller1, Test1","Caller2, Test2",4e534e4f-79bf-46be-8789-c2da7a2127c9,123456
10 "Admin, 1st-Tenant",12/13/17 10:40 AM,Conversation has been stopped.,Conversation 4e534e4f-79bf-46be-8789-c2da7a2127c9; ,"Caller1, Test1","Caller2, Test2",4e534e4f-79bf-46be-8789-c2da7a2127c9,123456
11 "Admin, 1st-Tenant",12/13/17 10:39 AM,Conversation has been stopped.,Conversation 4e534e4f-79bf-46be-8789-c2da7a2127c9; ,"Caller1, Test1","Caller2, Test2",4e534e4f-79bf-46be-8789-c2da7a2127c9,123456
12 "Admin, 1st-Tenant",12/13/17 10:39 AM,Conversation has been stopped.,Conversation 4e534e4f-79bf-46be-8789-c2da7a2127c9; ,"Caller1, Test1","Caller2, Test2",4e534e4f-79bf-46be-8789-c2da7a2127c9,123456
13 "Admin, 1st-Tenant",12/13/17 10:38 AM,Conversation has been stopped.,Conversation 4e534e4f-79bf-46be-8789-c2da7a2127c9; ,"Caller1, Test1","Caller2, Test2",4e534e4f-79bf-46be-8789-c2da7a2127c9,123456
```

Fig. 40: Audit log report

For information about activating notifications refer to the administration manual *System Configuration - Notifications module (for system providers)*.

This report template is available on tenant level.

3.6.8 Voice recordings (system)

This report allows exporting recorded call data from the database. Whether a conversation has been recorded depends on the configuration in the Recording Planner module of the application System Configuration. There, recording plans define certain rules which have to be fulfilled so that a recording is initiated. The recording plan decides when and whether a recording is started/stopped and whether external recording control by means of clients such as CLIENT-*command*, SCREEN*rec* or the PHONE*app*s is allowed. Therefore, it is possible that there are several recordings for one conversation. If, for instance, an agent stops the recording during a conversation and starts it again, there will be two recordings belonging to the same conversation. A conversation can be viewed from different perspectives. For every participant known in the system a view is created which include all recordings of the conversation that the participant has been involved in. The following data can be exported:

Conversation ID, start time, audio start, end time, duration of the conversation, creation date, conversation type, last update, call direction, name of the calling party, phone number of the calling party, PBX Agent ID of the calling party, name of the called party, phone number of the called party, PBX Agent ID of the called party, name of the 1st-connected, phone number of the 1st-connected, DTMF sequence, tenant, number of recordings and the customer-specific conversation parameters.

Konversation ID	Startzeit	Endzeit	Gesamtdaue	Rufrichtung	Gesprächsric	Name des Anrufers	Rufnummer	Name des zuerst Verbu	Rufnummer des	Name des Angerufe	Rufnummer	DTMF-Seque	Mandant	# der Aufzeic
36e94947-3240-4d07-b042-8bdb20767479	12.06.2013 07:11	12.06.2013 07:15	00:03:25	CALL	INTERNAL		6747608				6747608		System	1
f15cfdb6-3b21-45ed-9777-0f92c2d40806	14.06.2013 13:35	14.06.2013 13:35	00:00:27	CALL	OUTBOUND		3857625				7383364		System	1
0324133c-b2dc-44b3-a491-c204ded7ca5f	14.06.2013 15:38	14.06.2013 15:43	00:04:37	CALL	UNKNOWN		7048637				7048637		System	1
4529cd11-21bd-40e0-ac4b-21eb7a5bea10	17.06.2013 18:15	17.06.2013 18:16	00:01:29	CALL	INTERNAL		3515935				3515935		System	1
9033eae7-9a6d-4b2a-a07c-031a26ec7760	28.06.2013 03:55	28.06.2013 03:56	00:00:42	CALL	INBOUND		1347123				1347123		System	1
4b59ea54-567b-48ab-9602-bde7c4b1256e	28.06.2013 04:51	28.06.2013 04:51	00:00:29	CALL	UNKNOWN		5007698				8689661		System	1
aba79add-4e7a-4c29-8efa-0a52813d6581	02.07.2013 11:30	02.07.2013 11:33	00:02:28	CALL	OUTBOUND		3224643				2534684		System	1
7ea99f8d-3409-4686-8fbb-05fe416bc43d	08.07.2013 11:41	08.07.2013 11:42	00:00:40	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	2
acfb8be8-165a-44ae-8a16-b9fe612a5451	08.07.2013 11:42	08.07.2013 11:42	00:00:40	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100		4100		1st-Tenant	2
d284c195-bfa9-4b50-93b7-23fb0824f572	08.07.2013 11:43	08.07.2013 11:43	00:00:26	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100		4100		1st-Tenant	2
68829888-8bae-43c7-a784-82f89a9bbd51	08.07.2013 11:43	08.07.2013 11:44	00:00:54	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100		4100		1st-Tenant	2
702a5d07-0163-4a20-a915-111179a2ad22	08.07.2013 11:44	08.07.2013 11:44	00:00:27	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100		4100		1st-Tenant	2
b3cc7e2f-bdab-4bcd-95d2-25549f9473ca1	08.07.2013 11:44	08.07.2013 11:45	00:00:47	CALL	UNKNOWN								1st-Tenant	4
1d6397b2-e3c7-4c68-aafc-cf327d70540c	08.07.2013 11:44	08.07.2013 11:45	00:00:28	CALL	INTERNAL		151		151	Max Muster	4100		1st-Tenant	2
9a037c3f-4f32-42db-bc68-2cf10ccaf2bc	08.07.2013 11:46	10.07.2013 13:49	00:09:27	CALL	INTERNAL		151	1st-Tenant Admin	4015	1st-Tenant Admin	4015		1st-Tenant	45
21871c2a-8dd8-42e8-a00e-0d5917522df6	08.07.2013 11:46	10.07.2013 13:49	00:00:16	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	4
a1aa60ec-c068-4a2c-8609-47938d8b2478	08.07.2013 11:47	08.07.2013 11:47	00:00:00	CALL	INTERNAL	1st-Tenant Admin	4015		999		999		1st-Tenant	2
2745aa77-3bb7-48ab-9277-c24ecfca24f9	08.07.2013 11:48	10.07.2013 13:49	00:01:33	CALL	INTERNAL		150	1st-Tenant Admin	4015	1st-Tenant Admin	4015		1st-Tenant	7
832eceda-c7f3-4eff-9b01-f0e3e9be2c82	08.07.2013 11:48	08.07.2013 11:48	00:00:24	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	3
e1679161-46dc-4a32-821f-d9436484e732	08.07.2013 11:48	08.07.2013 11:48	00:00:00	CALL	INTERNAL	1st-Tenant Admin	4015		999		999		1st-Tenant	2
93d0ed80-e24f-42d4-b434-6824d23ba12a	08.07.2013 11:49	08.07.2013 11:50	00:00:21	CALL	INTERNAL		150	1st-Tenant Admin	4015	1st-Tenant Admin	4015		1st-Tenant	2
85fce51c-cc25-49ff-817b-3ac1db191afd	08.07.2013 11:50	08.07.2013 11:50	00:00:12	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	3
22b68940-327d-4c98-9407-bb06a0a20499	08.07.2013 11:50	08.07.2013 11:50	00:01:26	CALL	INTERNAL	1st-Tenant Admin	4015		999		999		1st-Tenant	5
595182f7-23a5-4bb1-86e6-8c4fdb9f4dc1	08.07.2013 11:51	08.07.2013 11:51	00:00:35	CALL	INTERNAL		150	1st-Tenant Admin	4015	1st-Tenant Admin	4015		1st-Tenant	3
c430c774-cc7e-4ab2-9b5d-3ecb7ca19fd5	08.07.2013 11:51	08.07.2013 11:51	00:00:18	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	3
61ee6c07-d9b2-4828-bcd7-38ba274cae9b	08.07.2013 11:51	08.07.2013 11:52	00:00:28	CALL	INTERNAL	1st-Tenant Admin	4015		999		999		1st-Tenant	3
780066f1-3f2b-4d7c-8edd-4f4b4cc27f1f	08.07.2013 11:52	08.07.2013 11:53	00:00:13	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	4
f4ca20cd-9f97-426f-b5f9-5dd32f98def3	08.07.2013 11:52	08.07.2013 11:53	00:00:50	CALL	INTERNAL	1st-Tenant Admin	4015		150		150		1st-Tenant	7
f0f7ca30-f724-4ff8-998c-f367e4b68b69	08.07.2013 11:53	08.07.2013 11:53	00:00:21	CALL	INTERNAL	1st-Tenant Admin	4015		999		999		1st-Tenant	4
f72f23d8-51bb-478f-ae32-33bcd32b9882	08.07.2013 11:54	08.07.2013 11:54	00:00:36	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	4
081c4023-b522-48cb-98d4-5b6b6dc08f61	08.07.2013 11:54	08.07.2013 11:54	00:00:29	CALL	INTERNAL	1st-Tenant Admin	4015		150		150		1st-Tenant	3
408ee834-2bfd-4783-ab92-840fb4ab7ad1	08.07.2013 11:54	08.07.2013 11:55	00:00:33	CALL	INTERNAL	1st-Tenant Admin	4015		999		999		1st-Tenant	4
7dd5a094-59f9-4f65-849f-d18362b48f68	08.07.2013 11:55	08.07.2013 11:55	00:00:14	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	4
1de5c91e-ccd1-423d-b6bd-3b34c27d54ce	08.07.2013 11:55	08.07.2013 11:56	00:00:45	CALL	INTERNAL	1st-Tenant Admin	4015		150		150		1st-Tenant	7
ce388ca7-7ecf-4aea-8140-64e872f9315a	08.07.2013 11:55	08.07.2013 11:56	00:00:22	CALL	INTERNAL	1st-Tenant Admin	4015		999		999		1st-Tenant	3
f5d765ac-ad60-40d1-a35f-55217d3d861c	08.07.2013 11:56	08.07.2013 11:56	00:00:12	CALL	INTERNAL	1st-Tenant Admin	4015	Max Muster	4100	Max Muster	4100		1st-Tenant	3
b672b468-fae7-487c-ac47-3f8f6b44bcb8	08.07.2013 11:56	08.07.2013 11:56	00:00:22	CALL	INTERNAL	1st-Tenant Admin	4015		150		150		1st-Tenant	3
125bb0b1-7409-48e4-85ed-da9e990f23a7	08.07.2013 11:56	08.07.2013 11:57	00:00:20	CALL	INTERNAL	1st-Tenant Admin	4015		999		999		1st-Tenant	3

Fig. 41: Voice recordings (example)

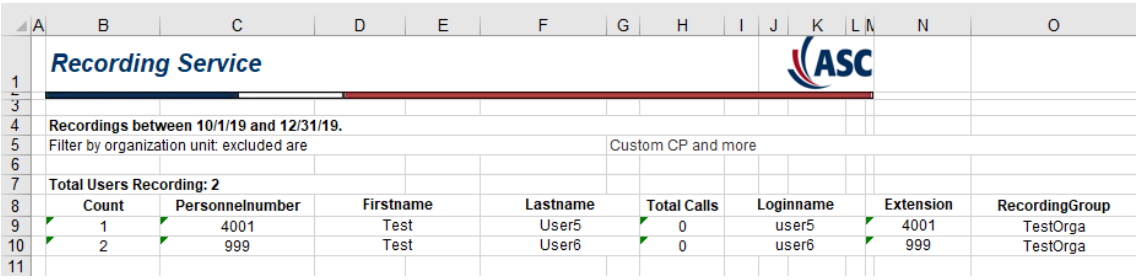
This report is available on system provider level.

3.6.9 Voice recordings (tenant)

This report allows exporting recorded call data from the database. Whether a conversation is recorded depends on the configuration in the Recording Planner module in the application System Configuration. There, recording plans with certain rules are defined which have to be met for a recording to be started. The recording plan decides whether and when a recording is started/stopped and whether external recording control by means of clients such as CLIENT-*command*, SCREEN*rec*, or the PHONE*app*s is allowed. Therefore, it is possible that there are several recordings for one conversation. If, for instance, an agent stops the recording during a conversation and starts it again, there will be two recordings belonging to the same conversation. A conversation can be viewed from different perspectives. For every participant known in the system, a view is created which refers to all recordings of the conversation that the participant has been involved in.

The report displays the following data about the recordings within the defined period of time:

First and last name of the agent, extension, employee ID, login name as well as the number of recordings per month. Furthermore, it is possible to filter the displayed information by selecting a certain organization unit.



Recording Service							
Recordings between 10/1/19 and 12/31/19.							
Filter by organization unit: excluded are				Custom CP and more			
Total Users Recording: 2							
Count	Personnelnumber	Firstname	Lastname	Total Calls	Loginname	Extension	RecordingGroup
1	4001	Test	User5	0	user5	4001	TestOrga
2	999	Test	User6	0	user6	999	TestOrga

Fig. 42: Voice recordings (example)

This report template is available on tenant level.

3.6.10 Import statistics

This report displays all imported conversations from all sources within the defined period of time. In case of missing imports, a table with the following information is displayed: ID, external reference, import job ID, error code, reference type and description, as well as the creation date.

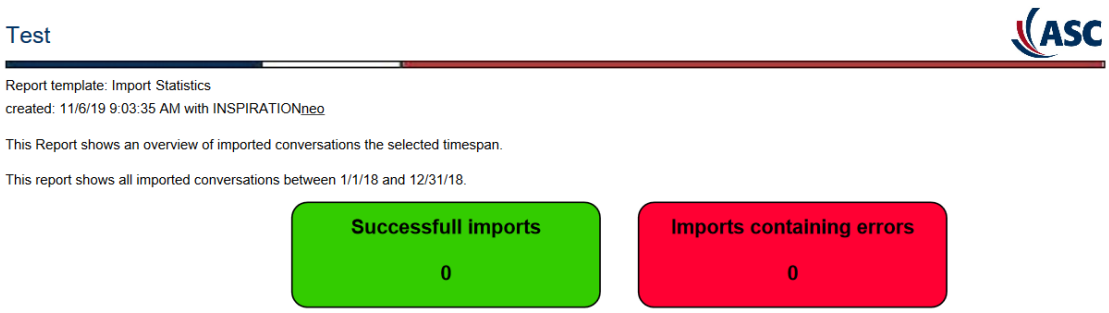
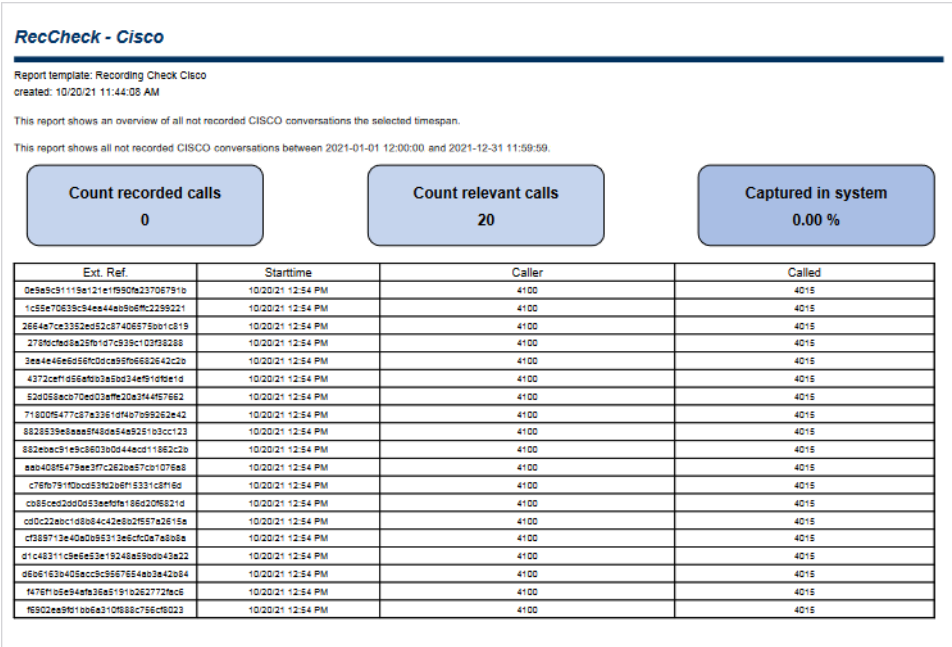


Fig. 43: Import statistics (example)

This report template is available on tenant level.

3.6.11 Recording check Cisco

This report shows the number of conversations that have been recorded in the system as well as the number of conversations from recorded external information sources (Cisco logs) that have been imported from this source previously. Furthermore, the percentage of recorded conversations in the *neo* system (actual value) in relation to the number of imported PBX information (target value) is displayed. For conversation missing in the system, a table with the following information is displayed: External reference (call ID from Cisco UCM, start time, extension of the calling party, extension of the called party.



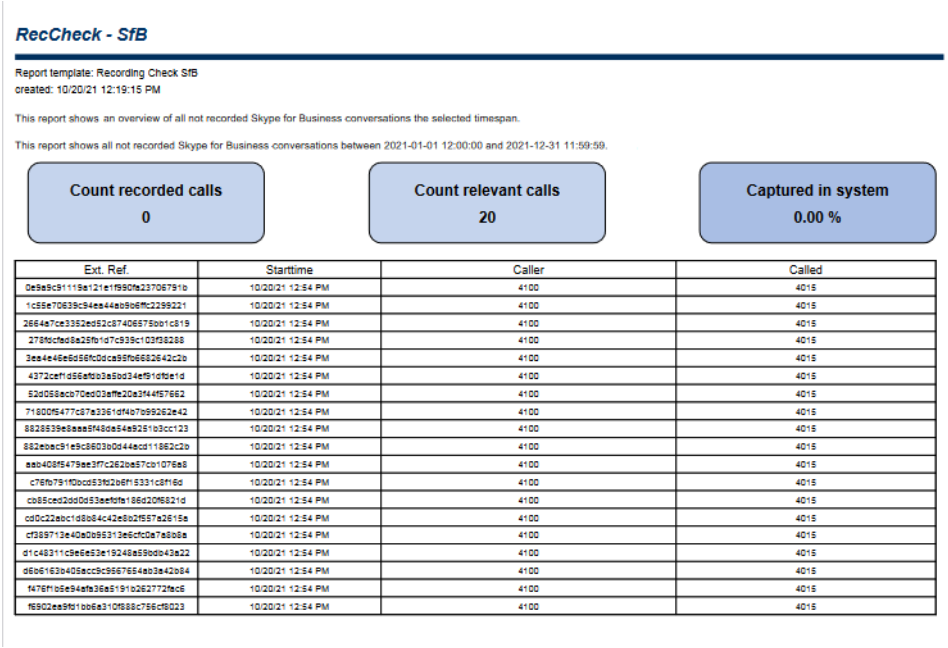
Ext. Ref.	Starttime	Caller	Called
0e9a9c51115a121e1f990fa23706791b	10/20/21 12:54 PM	4100	4015
1c55e70639c94ea44ab9b6ffc2299221	10/20/21 12:54 PM	4100	4015
2664a7ce3352ed52c87406575bb1c819	10/20/21 12:54 PM	4100	4015
278fdcfad8a25fb1d7c939c103f38288	10/20/21 12:54 PM	4100	4015
3ea4e46e6d56fc0dca99fb6682642c2b	10/20/21 12:54 PM	4100	4015
4372cef1d56affb3a5bd34ef91dfdfe1d	10/20/21 12:54 PM	4100	4015
52d058acb70ed03affe20a3f44f57662	10/20/21 12:54 PM	4100	4015
71800f5477c87a3361df4b7b99262e42	10/20/21 12:54 PM	4100	4015
8828539e8aaa8f48de54a9251b3cc123	10/20/21 12:54 PM	4100	4015
882ebac91e9c8603b0d44acd11862c2b	10/20/21 12:54 PM	4100	4015
aab408f5479ae3f7c262ba57cb1076a8	10/20/21 12:54 PM	4100	4015
c76fb7591f0bcd53fd2b6f15331c8f16d	10/20/21 12:54 PM	4100	4015
cb85ced2dd0d53aefdfa186d20f6821d	10/20/21 12:54 PM	4100	4015
cd0c22abc1d8d64c42e8b2f557a2615a	10/20/21 12:54 PM	4100	4015
cf389713e40a0b95313e6cfc0a7a8b8a	10/20/21 12:54 PM	4100	4015
d1c48311c9e6e53e19248a59bdb43a22	10/20/21 12:54 PM	4100	4015
d6b6163b405acc9c9667654ab3a42b84	10/20/21 12:54 PM	4100	4015
f476f1b5e94afa36a5191b262772fac6	10/20/21 12:54 PM	4100	4015
f6902ea9fd1bb6a310f888c756cf6023	10/20/21 12:54 PM	4100	4015

Fig. 44: Recording check Cisco (example)

This report is available on system provider level.

3.6.12 Recording check Skype for Business

This report shows the number of conversations that have been recorded in the system as well as the number of conversations from recorded external information sources (SfB database tables) that have been imported from this source previously. Furthermore, the percentage of recorded conversations in the *neo* system (actual value) in relation to the number of imported PBX information (target value) is displayed. For conversation missing in the system, a table with the following information is displayed: External reference (call ID from SfB, start time, extension of the calling party, extension of the called party.



RecCheck - SfB

Report template: Recording Check SfB
created: 10/20/21 12:19:15 PM

This report shows an overview of all not recorded Skype for Business conversations the selected timespan.

This report shows all not recorded Skype for Business conversations between 2021-01-01 12:00:00 and 2021-12-31 11:59:59.

Count recorded calls	Count relevant calls	Captured in system
0	20	0.00 %

Ext. Ref.	Starttime	Caller	Called
0e5a9c91119a121e1f990fa23706791b	10/20/21 12:54 PM	4100	4015
1c55e70639c94ea44ab9b6ffc2299221	10/20/21 12:54 PM	4100	4015
2664a7ce3352ed52c87406575bb1c819	10/20/21 12:54 PM	4100	4015
278fdcfed8a29fb1d7c939c103f38288	10/20/21 12:54 PM	4100	4015
3ea4e46e6d56fc0dca95fb6682642c2b	10/20/21 12:54 PM	4100	4015
4272cef1d56afdb3a5bd34ef51dfde1d	10/20/21 12:54 PM	4100	4015
52d068acb70ed03affe20e3f44f57662	10/20/21 12:54 PM	4100	4015
71800f5477c87e3361df4b7b99262e42	10/20/21 12:54 PM	4100	4015
8828539e8aa8f480a54a9251b3cc123	10/20/21 12:54 PM	4100	4015
882ebac91e9c8603b0d444acd11862c2b	10/20/21 12:54 PM	4100	4015
aab408f5479ae3f7c262ba57cb1076a8	10/20/21 12:54 PM	4100	4015
c76fb7911fbcd53fd2b6f15331c8f16d	10/20/21 12:54 PM	4100	4015
cb85ced2dd0d53aefdfa186d2066821d	10/20/21 12:54 PM	4100	4015
cd0c22abc1d8b84c42e8b2f557a2615a	10/20/21 12:54 PM	4100	4015
cf389713e40a0b95313e6cfc0a7a8b8a	10/20/21 12:54 PM	4100	4015
d1c48311c9e6e53e19248a59bdb43a22	10/20/21 12:54 PM	4100	4015
d6b6163b405acc9c9667654ab3a42b84	10/20/21 12:54 PM	4100	4015
f476f1b5e94afa36a5191b262772fac6	10/20/21 12:54 PM	4100	4015
f6902ea9fd1bb6a310f888c756cf8023	10/20/21 12:54 PM	4100	4015

Fig. 45: Recording check Skype for Business (example)

This report is available on system provider level.

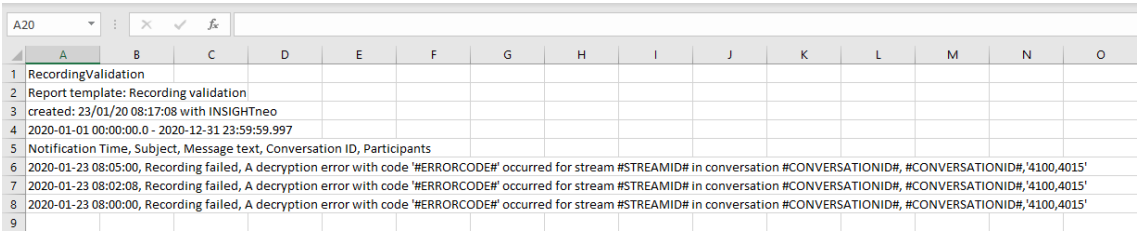
3.6.13 Recording Content Validation

This report gives an easy and quick overview of the validity of the audio content of the recording. It displays possible error messages as notifications of the selected type issued within the defined period of time in the Notifications module in a list. The following notification types are available as subject:

- RECORDING_STREAM_DECRYPTION_ERROR
- RECORDING_STREAM_PACKET_LOSS
- RECORDING_STREAM_DATA_MISSING
- RECORDING_STREAM_OPEN_FAILED
- CTICONNECT_STREAM_REQUEST_FAILED
- RECORDING_SILENCE_DETECTED

The participants' extensions can additionally serve as filter.

The report contains the following parameters: notification time, subject, message text, conversation ID, extension of the participants.



A20

	A
1	RecordingValidation
2	Report template: Recording validation
3	created: 23/01/20 08:17:08 with INSIGHTneo
4	2020-01-01 00:00:00.0 - 2020-12-31 23:59:59.997
5	Notification Time, Subject, Message text, Conversation ID, Participants
6	2020-01-23 08:05:00, Recording failed, A decryption error with code '#ERRORCODE#' occurred for stream #STREAMID# in conversation #CONVERSATIONID#, #CONVERSATIONID#,'4100,4015'
7	2020-01-23 08:02:08, Recording failed, A decryption error with code '#ERRORCODE#' occurred for stream #STREAMID# in conversation #CONVERSATIONID#, #CONVERSATIONID#,'4100,4015'
8	2020-01-23 08:00:00, Recording failed, A decryption error with code '#ERRORCODE#' occurred for stream #STREAMID# in conversation #CONVERSATIONID#, #CONVERSATIONID#,'4100,4015'
9	

Fig. 46: Recording content validation - example

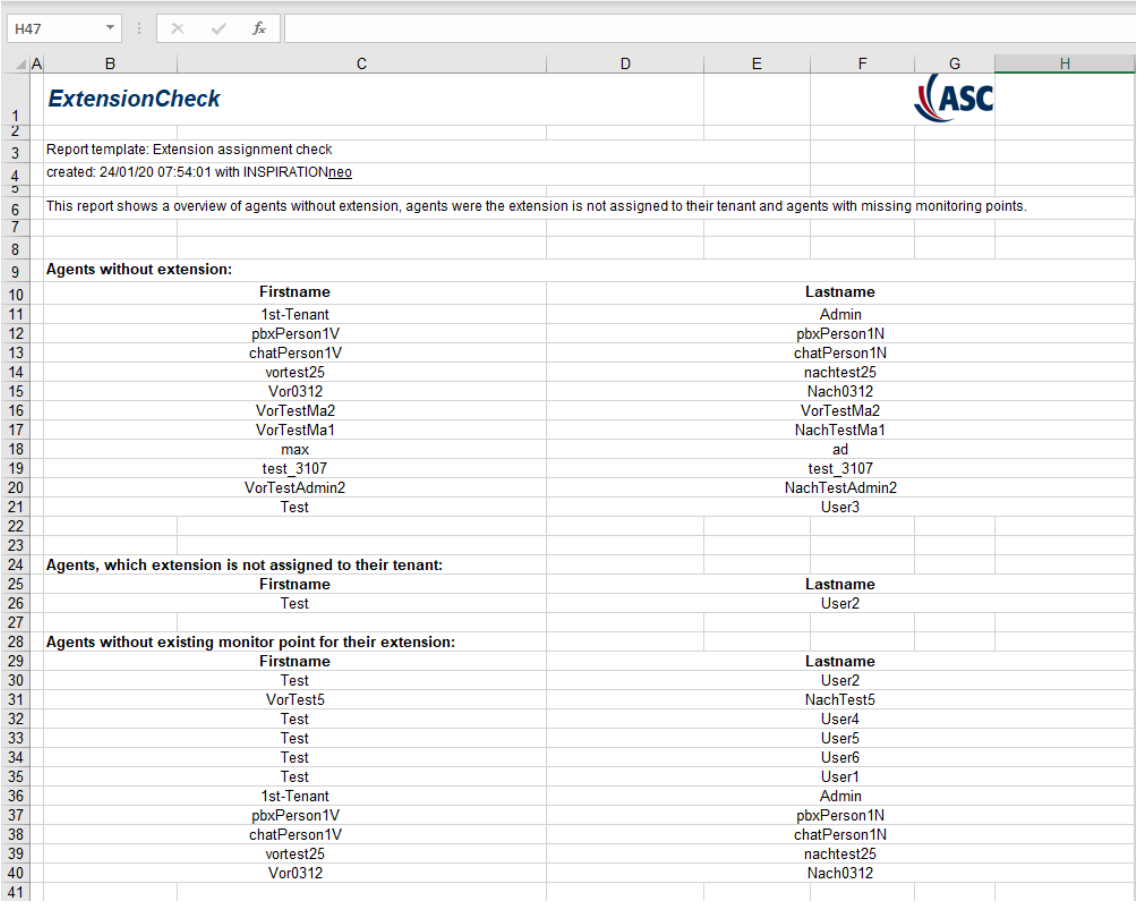
This report template is available on tenant level as well as on system provider level.

For information about the configuration of Recording Content Validation refer to the administration manual of your respective integration.

3.6.14 Extension check

This report displays the first and last names of those employees

- who have not been assigned an extension or
- whose extension has not been assigned to a tenant or
- for whose extensions no monitor point as been set.



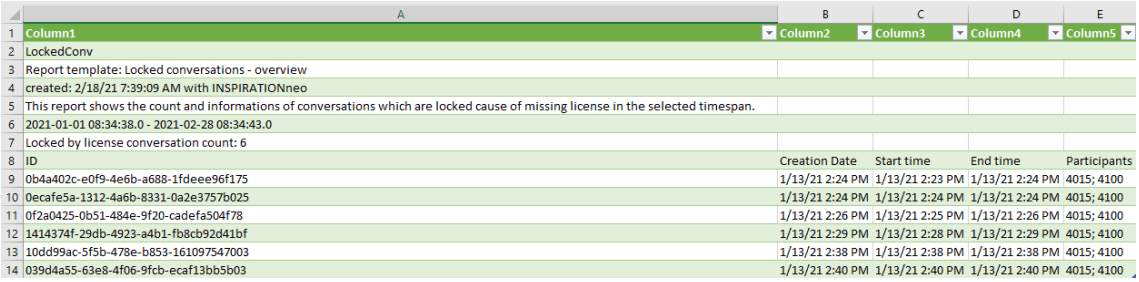
	A	B	C	D	E	F	G	H
1		***ExtensionCheck***					ASC	
2								
3		Report template: Extension assignment check						
4		created: 24/01/20 07:54:01 with INSPIRATIONneo						
5								
6		This report shows a overview of agents without extension, agents were the extension is not assigned to their tenant and agents with missing monitoring points.						
7								
8								
9		**Agents without extension:**						
10		**Firstname**		**Lastname**				
11		1st-Tenant		Admin				
12		pbxPerson1V		pbxPerson1N				
13		chatPerson1V		chatPerson1N				
14		vortest25		nachtest25				
15		Vor0312		Nach0312				
16		VorTestMa2		VorTestMa2				
17		VorTestMa1		NachTestMa1				
18		max		ad				
19		test_3107		test_3107				
20		VorTestAdmin2		NachTestAdmin2				
21		Test		User3				
22								
23								
24		**Agents, which extension is not assigned to their tenant:**						
25		**Firstname**		**Lastname**				
26		Test		User2				
27								
28		**Agents without existing monitor point for their extension:**						
29		**Firstname**		**Lastname**				
30		Test		User2				
31		VorTest5		NachTest5				
32		Test		User4				
33		Test		User5				
34		Test		User6				
35		Test		User1				
36		1st-Tenant		Admin				
37		pbxPerson1V		pbxPerson1N				
38		chatPerson1V		chatPerson1N				
39		vortest25		nachtest25				
40		Vor0312		Nach0312				
41								

Fig. 47: Extension check (example)

This report is available on system provider level.

3.6.15 Locked conversations - overview

This report displays the number of all conversations in the system which have been locked due to missing licenses within the defined period of time. In addition, the conversation ID, the creation date, the start and end time as well as the conversation participants are displayed.



	A	B	C	D	E
1	Column1	Column2	Column3	Column4	Column5
2	LockedConv				
3	Report template: Locked conversations - overview				
4	created: 2/18/21 7:39:09 AM with INSPIRATIONneo				
5	This report shows the count and informations of conversations which are locked cause of missing license in the selected timespan.				
6	2021-01-01 08:34:38.0 - 2021-02-28 08:34:43.0				
7	Locked by license conversation count: 6				
8	ID	Creation Date	Start time	End time	Participants
9	0b4a402c-e0f9-4e6b-a688-1fdeee96f175	1/13/21 2:24 PM	1/13/21 2:23 PM	1/13/21 2:24 PM	4015; 4100
10	0ecafe5a-1312-4a6b-8331-0a2e3757b025	1/13/21 2:24 PM	1/13/21 2:24 PM	1/13/21 2:24 PM	4015; 4100
11	0f2a0425-0b51-484e-9f20-cadefa504f78	1/13/21 2:26 PM	1/13/21 2:25 PM	1/13/21 2:26 PM	4015; 4100
12	1414374f-29db-4923-a4b1-fb8cb92d41bf	1/13/21 2:29 PM	1/13/21 2:28 PM	1/13/21 2:29 PM	4015; 4100
13	10dd99ac-5f5b-478e-b853-161097547003	1/13/21 2:38 PM	1/13/21 2:38 PM	1/13/21 2:38 PM	4015; 4100
14	039d4a55-63e8-4f06-9fcb-ecaf13bb5b03	1/13/21 2:40 PM	1/13/21 2:40 PM	1/13/21 2:40 PM	4015; 4100

Fig. 48: Locked conversations (example)

This report template is available on tenant level.

3.7 Nonstandard reports

The following reports are nonstandard. To be able to use these reports, customization on behalf of ASC is required and can be ordered by the customer as a professional service.

3.7.1 User call overview

This report gives an overview of the total number of calls as well as of the number of incoming and outgoing calls within the defined period of time. The following parameters are displayed in a table in the detail view: Extension, first name, last name, total number of calls, incoming, outgoing, average talk time, average talk time of outgoing calls, average talk time of incoming calls, total talk time.

A filter function allows searching for calls which meet certain criteria such as date or extension.

UserCallActivity

Report template: UserCallActivity
created: 1/25/17 4:10:11 PM with INSPIRATIONneo

This report shows an overview of the call-activities from for the selected extensions in the selected timespan.

This report considers recordings between 1/1/17 and 12/31/17.

35	3	32
Total Calls	Incoming	Outgoing

Extension	Firstname	Lastname	Total Calls	Incoming	Outgoing	Avg. Talktime	Avg. Out.	Avg. Inc.	Total
KADHL-1	SNOM	D725	12	2	10	00:00:10	00:00:13	00:00:08	00:02:10
KADHL-2	Matthias	Test	12	0	12	00:00:06	00:00:06	00:00:00	00:01:21
KADHL-4	SNOM	760	1	0	1	00:00:15	00:00:15	00:00:00	00:00:15
KADHL-5	Matthias	Rödel	2	1	1	00:00:07	00:00:14	00:00:06	00:00:14
KADHL-6	TestUser	Extension6	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
KADHL-7	N/A	N/A	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
KADHLTestRec-	N/A	N/A	3	0	3	00:00:13	00:00:23	00:00:00	00:01:10
KADHLTestRec-	N/A	N/A	4	0	4	00:00:07	00:00:11	00:00:00	00:00:46
KADHLTestRec-	N/A	N/A	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
KADHLTestRec-	N/A	N/A	1	0	1	00:00:23	00:00:21	00:00:00	00:00:21
KADHLTestRec-	N/A	N/A	0	0	0	00:00:10	00:00:00	00:00:00	00:00:00
PBXTenantID=K	N/A	N/A	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
PBXTenantID=K	N/A	N/A	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00

Fig. 49: Calls of the user (example)

This report is available on system provider level.

To be able to use this report, additional configurations are required which cannot be implemented independently. If requested, the feasibility in the customer's system can be assessed within the scope of a professional service.

3.7.2 Detailed call activity

This report gives an overview of the total number of calls within the defined period of time as well as of their total duration. The following parameters are displayed in a table in the detail view: Extension, first name, last name, date and time, duration, phone number, and type (call direction).

A filter function allows searching for calls which meet certain criteria such as date or extension.

UserDetailedCallActivity

Report template: UserDetailedCallActivity
created: 1/25/17 4:11:12 PM with INSPIRATIONneo

This report shows an detailed overview of the call-activities for the select extensions in the selected timespan.

This report considers recordings between 1/1/17 and 12/31/17.

35 — Total Calls

00:00:06:44 — Total Duration

Extension	Firstname	Lastname	Datetime	Duration	Number	Type
0060211306176	N/A	N/A	1/13/17 12:40 AM	00:00:10	+4960211307381	INBOUND
0060211306176	N/A	N/A	1/13/17 12:44 AM	00:00:06	+4960211307381	INBOUND
0060211306176	N/A	N/A	1/13/17 12:44 AM	00:00:06	+4960211307385	INBOUND
KADHL-1	N/A	N/A	1/12/17 6:34 AM	00:00:08	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/12/17 10:42 AM	00:00:06	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/12/17 11:49 PM	00:00:13	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/12/17 11:52 PM	00:00:18	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/13/17 12:02 AM	00:00:08	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/13/17 12:30 AM	00:00:29	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/13/17 12:32 AM	00:00:09	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/13/17 12:37 AM	00:00:15	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/13/17 1:19 AM	00:00:08	0060211306176	OUTBOUND
KADHL-1	N/A	N/A	1/13/17 7:42 AM	00:00:10	0060211306176	OUTBOUND
KADHL-2	N/A	N/A	1/2/17 12:03 PM	00:00:03	0060215001311	OUTBOUND
KADHL-2	N/A	N/A	1/2/17 5:42 PM	00:00:07	0060215001311	OUTBOUND

Fig. 50: Calls of the user in detail (example)

This report is available on system provider level.

To be able to use this report, additional configurations are required which cannot be implemented independently. If requested, the feasibility in the customer's system can be assessed within the scope of a professional service.

3.7.3 Daily call overview

This report gives an overview of the total number of calls as well as of the number of incoming and outgoing calls within one day. The following parameters are displayed in a table in the detail view: Date, all (total number of calls), incoming, outgoing, average talk time, average talk time of outgoing calls, average talk time of incoming calls, total talk time.

A filter function allows searching for calls which meet certain criteria such as date or extension.

DailyCallActivity

Report template: DailyCallActivity
created: 1/25/17 4:09:35 PM with INSPIRATIONneo

This report shows an overview of the daily call-activities for the selected extensions in the selected timespan.

This report considers recordings between 1/1/17 and 12/31/17.

35	3	32
Total Calls	Incoming	Outgoing

Date	Total	Incoming	Outgoing	Avg. Talktime	Avg. Out.	Avg. Inc.	Total Talktime
01.01.2017	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
02.01.2017	2	0	2	00:00:05	00:00:05	00:00:00	00:00:11
03.01.2017	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
04.01.2017	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
05.01.2017	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
06.01.2017	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
07.01.2017	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
08.01.2017	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00
09.01.2017	1	0	1	00:00:06	00:00:06	00:00:00	00:00:06
10.01.2017	3	0	3	00:00:08	00:00:08	00:00:00	00:00:25
11.01.2017	1	0	1	00:00:05	00:00:05	00:00:00	00:00:05
12.01.2017	12	3	9	00:00:12	00:00:14	00:00:07	00:02:29
13.01.2017	2	0	2	00:00:09	00:00:09	00:00:00	00:00:18
14.01.2017	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00

Fig. 51: Calls thought the day (example)

This report is available on system provider level.

To be able to use this report, additional configurations are required which cannot be implemented independently. If requested, the feasibility in the customer's system can be assessed within the scope of a professional service.

4 Default dashboard templates

By means of default dashboard templates you can create dashboard reports which present results as a graphic. The following default dashboard templates are available in the system:

4.1 Agent dashboards

4.1.1 My duration - agent

This dashboard widget displays the average duration of the recorded calls of the logged-in agent in comparison to the average duration of the recordings of the members of the same organization unit(s). The widget considers the data of the last year, ending with the current month. If the current date is 13th December, then the dashboard displays the data from January of this year up to and including December of this year (current month).

The green line indicates the configured nominal value (trend point).

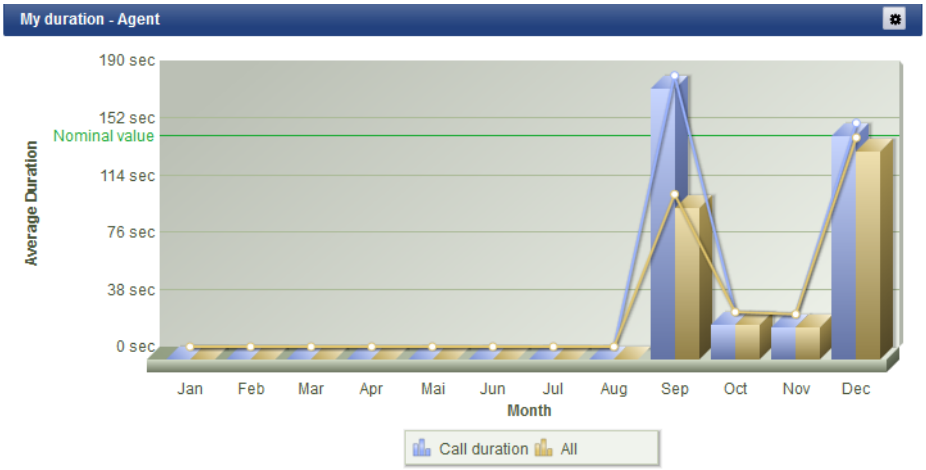


Fig. 52: My duration - agent (example)

This report template is available on tenant level.

4.1.2 My score - agent

This dashboard widget displays the average score of all evaluations of the logged-in agent (gray arrow) in comparison to the average score of the organization unit that the agent belongs to (white arrow); if the agent belongs to several organization units, the white arrow indicates the overall average of all organization units. If the logged-in agent does not belong to an organization unit, there is no white arrow.

Only first evaluations and re-evaluations which have been released within the period selected during the creation of the report template are considered.

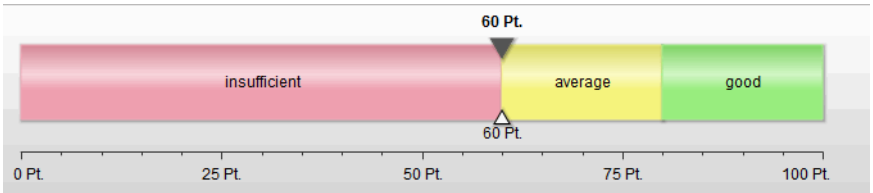


Fig. 53: My score - agent (example)

This report template is available on tenant level.

4.1.3 My quantity - agent

This dashboard widget displays the number of all sessions which have been recorded for the logged-in agent in comparison to the number of released evaluations per month. The widget considers the data of the last year, ending with the current month. If the current date is 13th December, then the dashboard displays the data from January of this year up to and including December of this year (current month). The evaluations which are considered in the report do not necessarily have to be based on the simultaneously displayed sessions

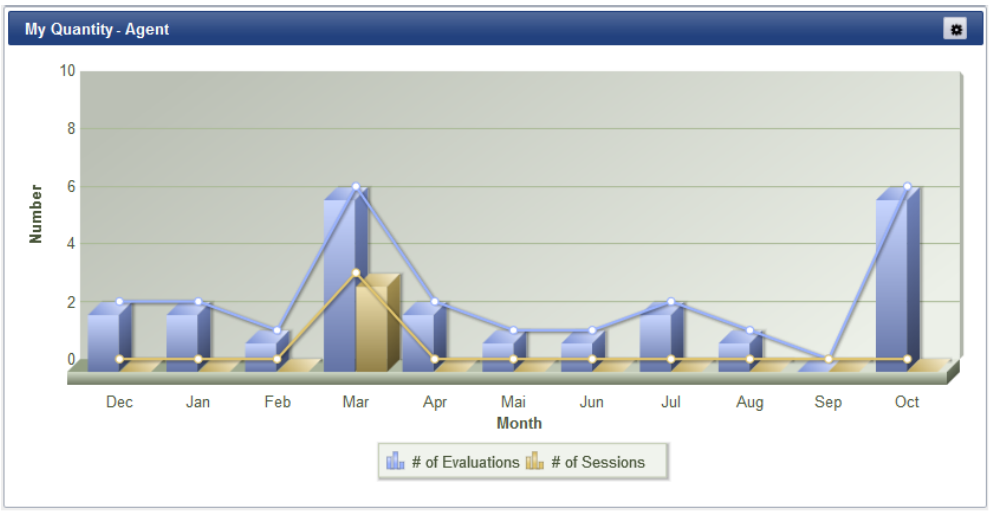


Fig. 54: My quality - agent (example)

This report template is available on tenant level.

4.1.4 My team score - agent

This dashboard widget features a bar chart displaying the average score that the members of the organization unit(s) that the logged-in agent belongs to have reached in all their evaluations. Besides a bar for the score of the organization unit of the logged-in agent, four additional bars for other organization units can be displayed. The dark blue line *My score* describes the history of the average score that the logged-in agent has reached in his own evaluations. By clicking on the labels in the legend, individual bars or the line of the score can be hidden or displayed again.

Only first evaluations and re-evaluations which have been released within the period selected during the creation of the report template are considered. During the creation of the report template, a check box offers the possibility to anonymize the displayed organization units. If checked, there is only one additional bar labelled *Other teams* besides the bar for the organization unit of the logged-in agent.

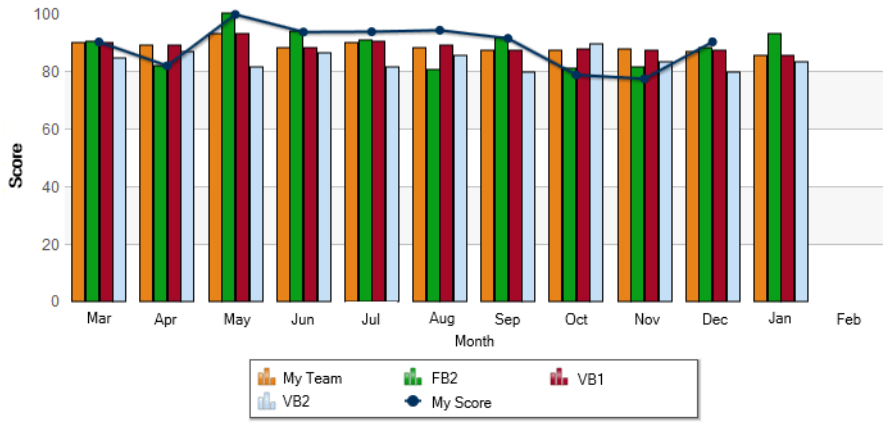


Fig. 55: My team score - agent (example)

This report template is available on tenant level.

4.1.5 My team knowledge - agent

This dashboard widget features a bar chart displaying the average score that the members of the organization unit(s) that the logged-in agent belongs to have reached in all their quizzes. Besides a bar for the score of the organization unit of the logged-in agent, four additional bars for other organization units can be displayed. The dark blue line *My score* describes the history of the average score that the logged-in agent has reached in his own quizzes. By clicking on the labels in the legend, individual bars or the line of the score can be hidden or displayed again.

Only quizzes with the status *Finished* which have been finished within the period selected during the creation of the report template are considered. During the creation of the report template, a check box offers the possibility to anonymize the displayed organization units. If checked, there is only one additional bar labelled *Other teams* besides the bar for the organization unit of the logged-in agent.

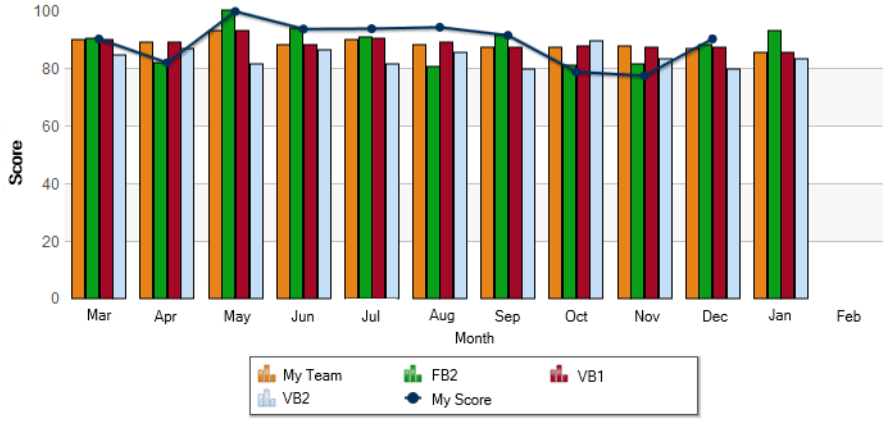


Fig. 56: My team knowledge - agent (example)

This report template is available on tenant level.

4.1.6 My knowledge - agent

This dashboard widget displays the average score of all quizzes of the logged-in agent (gray arrow) in comparison to the average score of the organization unit that the agent belongs to (white arrow); if the agent belongs to several organization units, the white arrow indicates the overall average of all organization units. If the logged-in agent does not belong to an organization unit, there is no white arrow.

Only quizzes with the status *Finished* which have been finished within the period selected during the creation of the report template are considered.

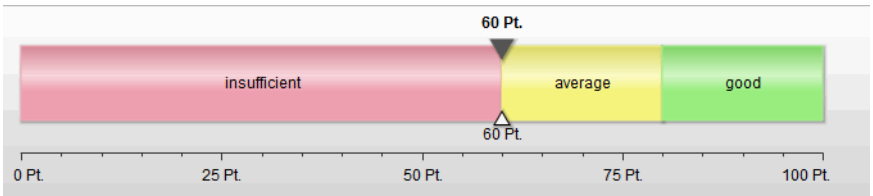


Fig. 57: My knowledge - agent (example)

This report template is available on tenant level.

4.2 Supervisor dashboards

4.2.1 My quantity - supervisor

This dashboard widget displays the number of all evaluations which have been released by the logged-in supervisor in comparison to the number of the evaluated agents. The widget considers the data of the last year, ending with the current month. If the current date is 13th December, then the dashboard displays the data from January of this year up to and including December of this year (current month). Only those evaluations are considered which have been created by the currently logged-in user.

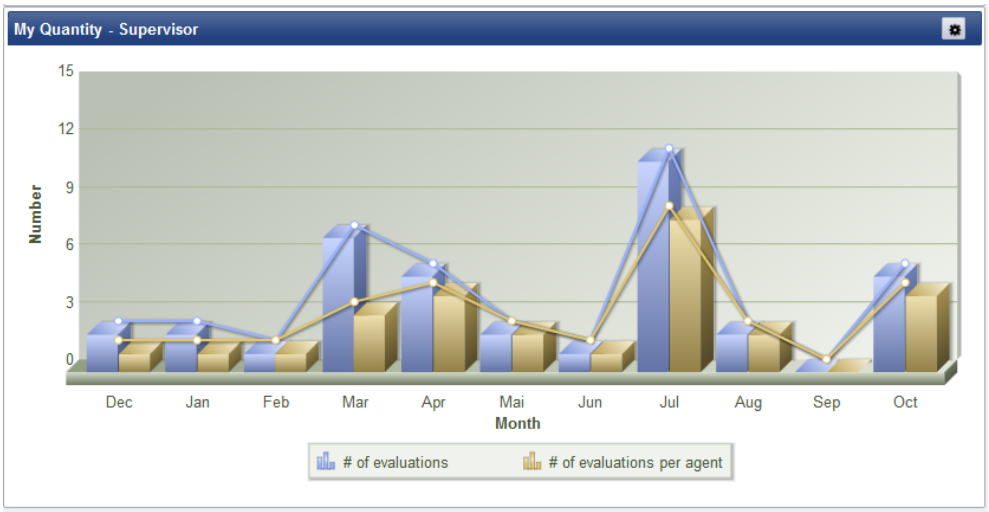


Fig. 58: My quality - supervisor (example)

This report template is available on tenant level.

4.2.2 My team - supervisor

This dashboard widget features a bar chart comparing the average number of evaluations in the organization unit that the logged-in supervisor is the superior of with the average number of evaluations made in other organization units. The dark blue line *My values* describes the history of the average number of evaluations that the logged-in supervisor has made. Besides a bar for the number of evaluations of the organization unit of the logged-in supervisor (My team), four additional bars for other organization units can be displayed. By clicking on the labels in the legend, individual bars or the line of the number of evaluations can be hidden or displayed again.

During the creation of the report template, a check box offers the possibility to anonymize the displayed organization units. If checked, there is only one additional bar labelled *Other teams* besides the line *My values* and the bar for the team of the logged-in supervisor.

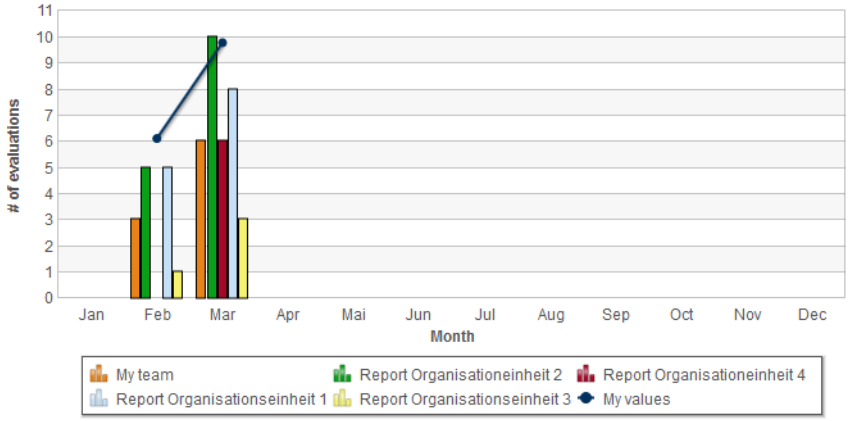


Fig. 59: My team - supervisor (example)

Hovering the cursor over one of the bars, displays the following additional information:

- Name of the organization unit
- Total number evaluations
- Evaluations per supervisor on average
- Evaluations per agent on average
- Score on average

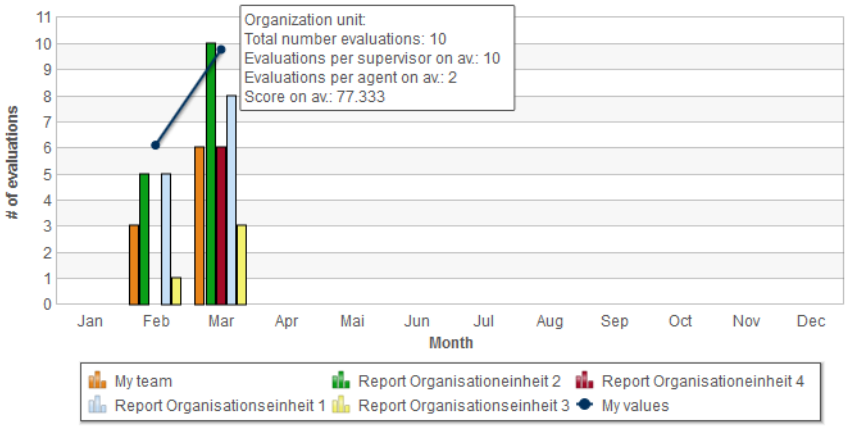


Fig. 60: My team - supervisor, details (example)

This report template is available on tenant level.

4.3 Recording dashboards

Within the system, you are provided with templates for different recording dashboards. They serve to display the statistic values of the recording compiled every hour in the recording widget. To be able to see the any icons and information in the recording widget, the following templates have to be imported and the corresponding recording dashboard instances created and released in the Report Instances module. As a consequence the reports will be available in the Dashboards module as well as in the application Portal.

4.3.1 Total number of calls

This recording dashboard displays the total number of calls as well as the number of incoming and outgoing calls within the defined period of time in the recording widget. The following icons are used:

	Number of outgoing calls

	Number of incoming calls
	Total number of calls
	Trend • Upward • Downward • Unchanged The following comparison periods for the trends are available: • *last hour/the hour before* • *last 12 hours/the 12 hours before* • *today/yesterday* • *this week/last week* • *this month/last month* • *this quarter/last quarter*

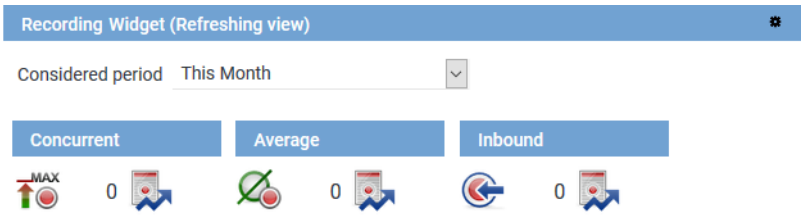


Fig. 61: Recording Dashboard (example)

This report template is available on tenant level.

4.3.2 Average duration of all recordings

This recording dashboard displays the average duration of all recordings within the defined period of time in the recording widget. The following icons are used:

	Average duration in seconds
	Trend • Upward • Downward • Unchanged The following comparison periods for the trends are available: • *last hour/the hour before* • *last 12 hours/the 12 hours before* • *today/yesterday*

	• *this week/last week* • *this month/last month* • *this quarter/last quarter*

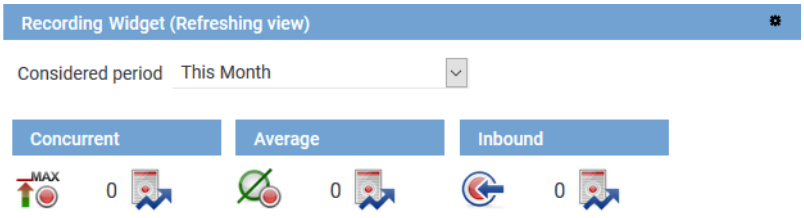


Fig. 62: Recording Dashboard (example)

This report template is available on tenant level.

4.3.3 Maximum number of concurrent recordings

This recording dashboard displays the maximum number of concurrent calls within the defined period of time in the recording widget. The following icons are used:

MAX	Maximum number of concurrent calls
	Trend • Upward • Downward • Unchanged The following comparison periods for the trends are available: • *last hour/the hour before* • *last 12 hours/the 12 hours before* • *today/yesterday* • *this week/last week* • *this month/last month* • *this quarter/last quarter*

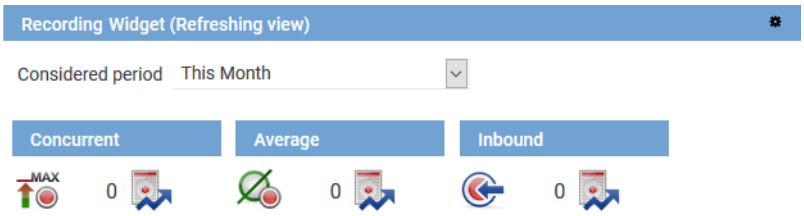


Fig. 63: Recording Dashboard (example)

This report template is available on tenant level.

4.4 Other dashboards

4.4.1 Average call duration

This dashboard widget displays the average duration of the recorded QM calls of a tenant within the course of the last year, ending with the current month. If the current date is 13th December, then the dashboard displays the data from January of this year up to and including December of this year (current month).

The needle indicates the average duration; the marks on the dial indicate the configured trend points, i. e. the nominal values which show whether the call duration is tolerable and within the defined limits.

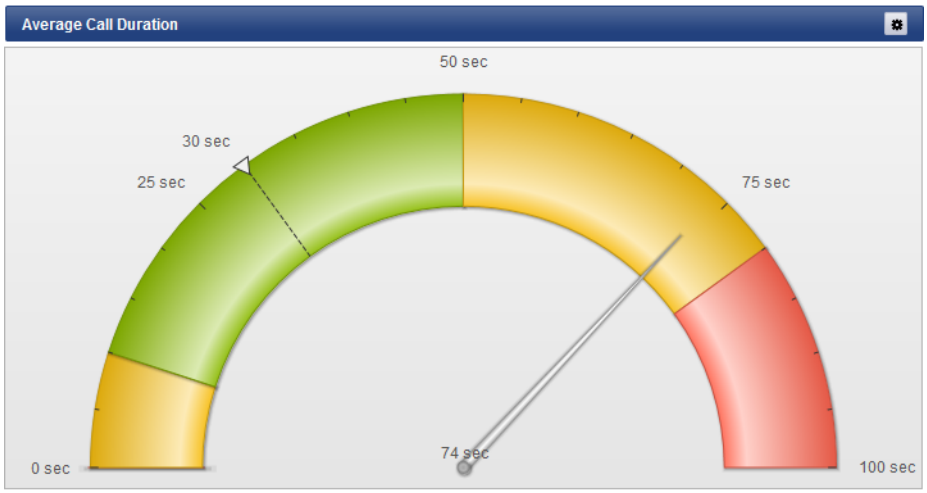


Fig. 64: Average call duration (example)

This report template is available on tenant level.

4.4.2 Number of sessions

This dashboard widget shows the number of the recorded calls which are not used for QM purposes (compliance recording plan) as well as the number of calls recorded for QM purposes (QM recording plan). The dashboard considers sessions and released evaluations which have

respectively been recorded and created within the course of the last year, ending with the current month. All sessions of those agents who are in the same organization unit as the supervisor who is using this dashboard are considered.

The first view compares the sessions which have been recorded via a QM plan and the sessions recorded via a compliance plan. When clicking on this first view, you are forwarded to a detailed view of the sessions which have been recorded for quality management purposes, divided into already evaluated sessions and sessions which have not yet been evaluated.

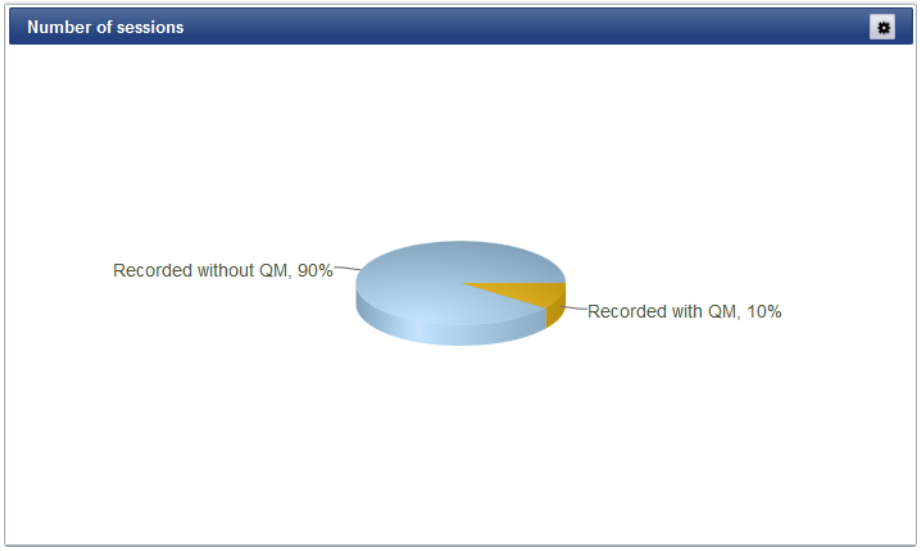


Fig. 65: Number of sessions (example)

When clicking on the dashboard, you are forwarded to a detailed view of the QM sessions, i. e. of those sessions which have been evaluated for quality management purposes. QM sessions are divided into evaluated and not yet evaluated sessions.

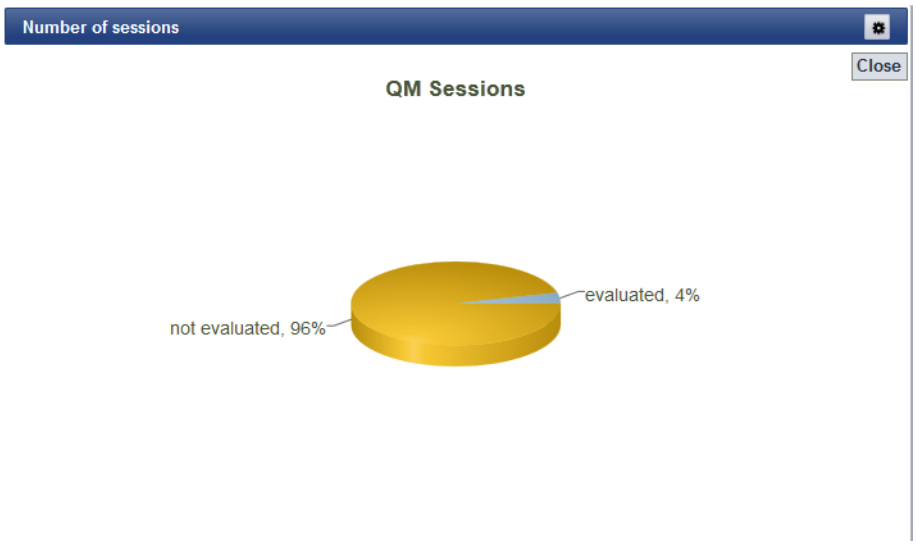


Fig. 66: Detailed view of the QM sessions (example)

The number of evaluated sessions includes released first evaluations as well as released reevaluations. If a session has been evaluated several times, it is counted as one in the dashboard report.

This report template is available on tenant level.

4.4.3 Evaluation keyword spotting

This dashboard widget displays the percentages of calls which do (*Fulfilled*) or do not contain (*Not fulfilled*) keywords of the selected analysis list(s). You cannot select more than 5 keyword lists. In addition to the keyword lists, a fixed period of time (today, yesterday, last week, last month, last quarter, last year) as well as certain agents and organization units can be selected as parameters.

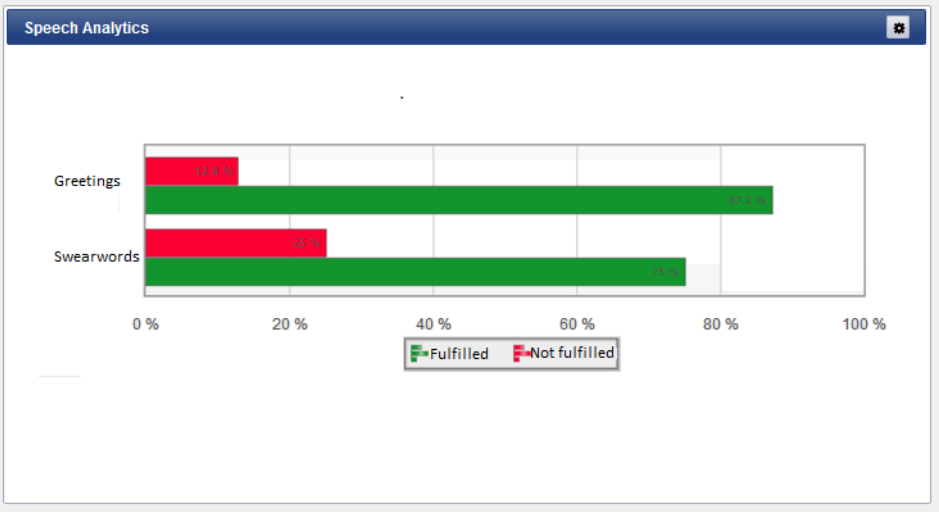


Fig. 67: Keyword analysis (example)

This report template is available on tenant level.

5 Main view

All available report templates are displayed in the main view.

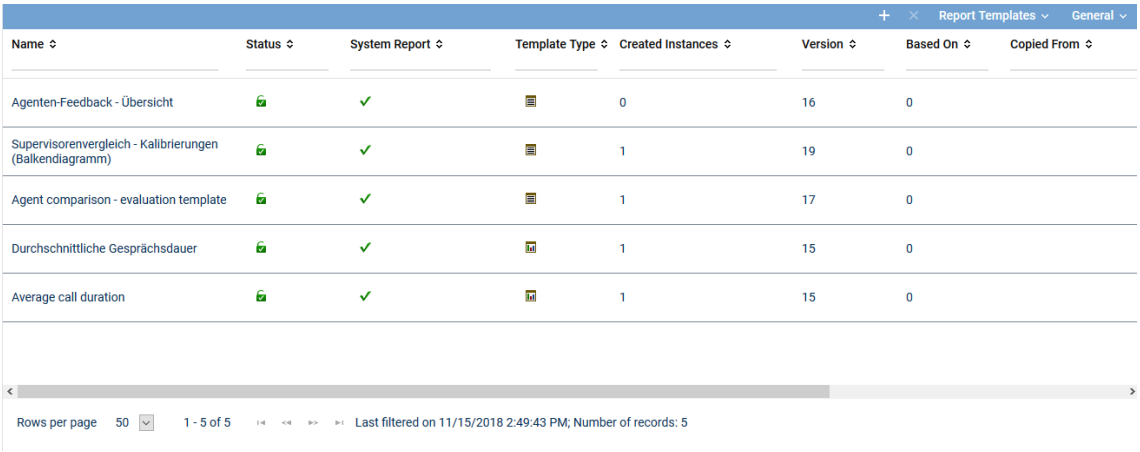


Fig. 68: Report templates - main view

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

Name	Name of the report template
Status	Shows the processing status of the report template. = released = draft = deactivated
System Report	Shows whether the report template is a system report. ✓ = Report template is a system report. ✗ = Report template is not a system report.
Template Type	Shows the type of the template. = report template = dashboard template
Created Instances	Shows the number of instances which have been created for the template.
Version	Version number of the report template
Based On	Template which has been the basis for the new template.
Copied From	Name of the template from which this template has been cloned (function *Create* > *Clone*).
New Version Of	Name of the template which has been the basis for the new template (function *Create* > *Create New Version*).
Created By	Shows the name of the user who has created the report template.
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.

5.1 Toolbar

The toolbar offers the following functions.

Fig. 69: Toolbar Report Templates module

	Search	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see chapter "Search", p. 59. The icon is displayed whenever the search has been adjusted by means of a filter.
	Reset search	Resets all manually entered search criteria.
	Create	Here, you can add a report template or create a new version. See chapter "Create", p. 67.
	Delete	The report template is deleted. System report templates and report templates with an active report instance cannot be deleted.
Report Templates	*Deactivate*	The report template is deleted and cannot be used any longer. It cannot be deactivated again.
	Export	Here, you can export an existing template or resource bundles. See chapter "Export Report Template", p. 71.
	Import	Here, you can import a system report template. See chapter "Import system report template", p. 72.
General	*Print*	Prints the table of the main view.
	Adjust Table	Opens a window where you can adjust the following settings for the main view: • Displayed information • Order of the displayed columns • Number of rows per page
	General Help	Opens the online help.
	Module Help	Opens the module-specific online help.

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

See also

- Create [▸ 67]
- Export Report Template [▸ 71]
- Import system report template [▸ 72]

5.1.1 Search

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

1. In the toolbar, click on the icon or *(Search)*.
   ⇨ The window *Search Criteria* appears.

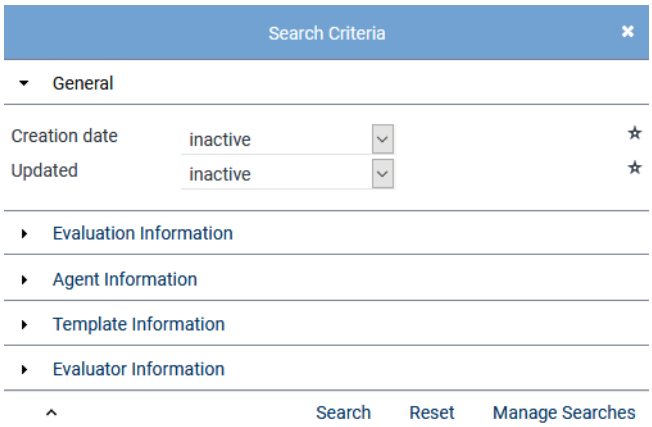


Fig. 70: Window Search Criteria (example)

2. Set the respective search criteria.
   NOTICE! It depends on the respective module which search criteria are available.
3. To start the search, click on the button *Search*.
   To reset all manually entered search criteria, click on the button *Reset*.
   ⇨ After running the search, only those sets of data are displayed in the main view which meet the set search criteria.
4. To display all original sets of data in the main view again, i. e. to reset the manually entered search criteria, click on the icon *(Reset search)* in the toolbar.

By clicking on the button *Manage Searches*, you can save the defined search criteria under an unambiguous name, load saved search criteria or delete them.

By clicking on 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 *INSIGHTneo - General information*.

6 Detail view

The detail view contains additional information about as well as functions of the selected report template.

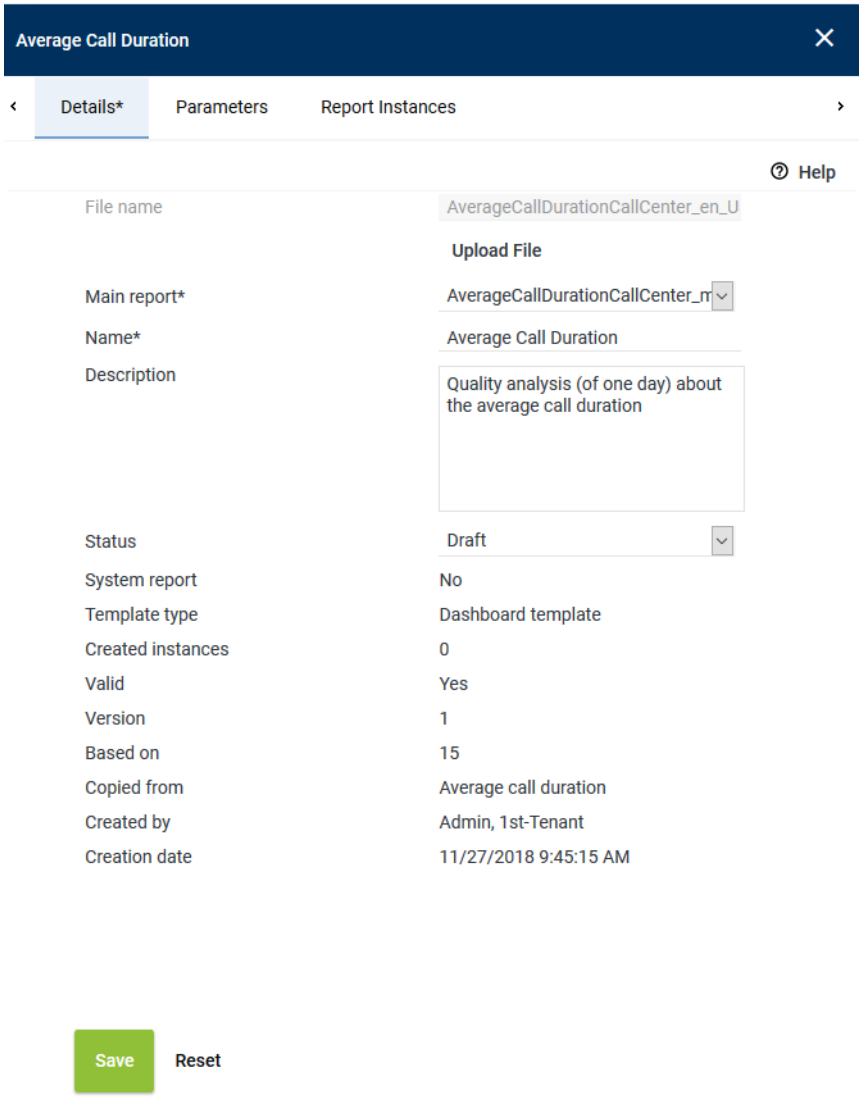


Fig. 71: Report templates - detail view

The detail view consists of the following tabs:

- *Details*

  Here, the details of the selected report template are displayed. See chapter "Tab Details", p. 61.

- *Parameters*

  Here, the parameters of the selected report template are displayed. See chapter "Tab Parameters", p. 63.

- *Report Instances*

  Here, the assigned report instances of the selected report template are displayed. See chapter "Tab Report Instances", p. 66

6.1 Tab Details

Here, details of the selected report template are displayed.

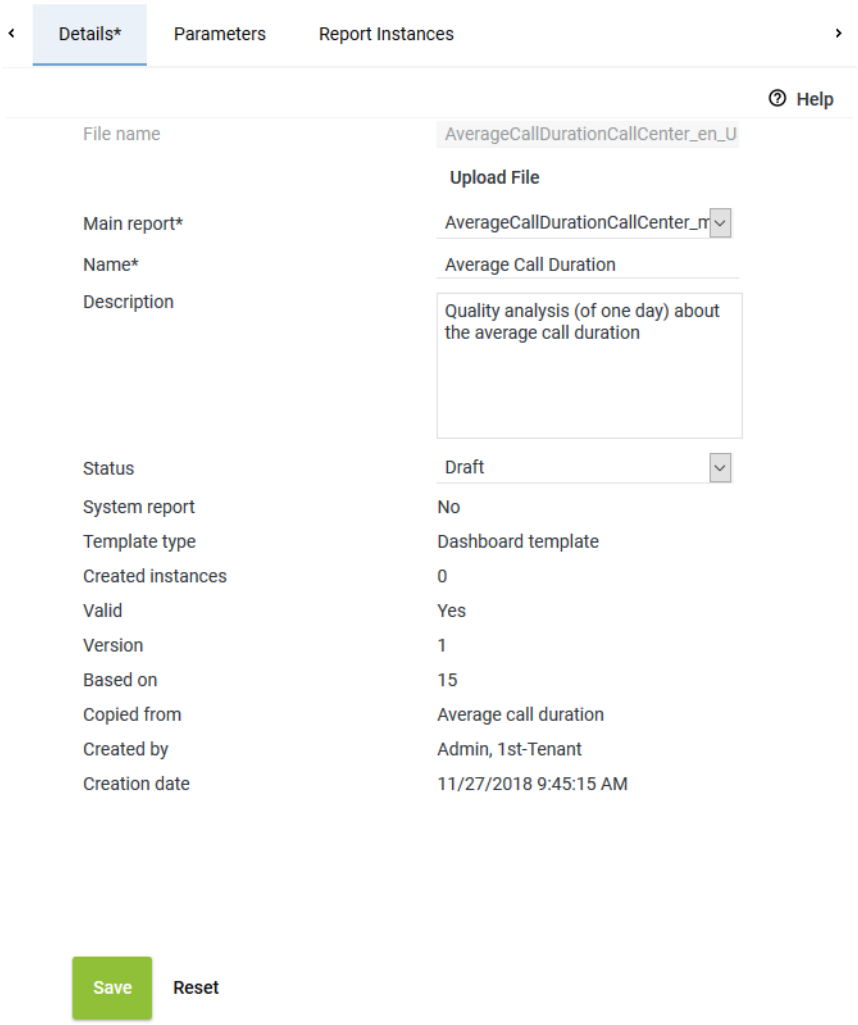


Fig. 72: Tab Details

File name	Here, the name of the file is displayed. The report template file has to be uploaded by clicking on the button *Upload File*. See chapter "Upload File", p. 69.
Main report	Here, you can select the main report for the template.
Name	Name of the report template
Description	Shows the description which has been saved for the report template.
Status	Shows the processing status of the report template: *Draft*, *Released*, or *Deactivated*
System report	Shows whether the report template is a system report.
Template type	Shows the type of the template: *Report template* or *Dashboard template*
Created instances	Shows the number of instances which have been created for the template.
Valid	Shows whether the template is valid or invalid.
Version	Version number of the report template
Based on	Template which has been the basis for the new template.
Copied from	Name of the template from which this template has been cloned (function *Create* > *Clone*).
New version of	Name of the template which has been the basis for the new template (function *Create* > *Create New Version*).

Created by	Shows the name of the user who has created the report template.
Creation date	Shows the date on which the template was created.

6.2 Tab Parameters

Here, details of the selected report template are displayed. The values can only be edited as long as the report template has the status *Draft*. In all other cases the tab is not active and the values are only visible but not editable.

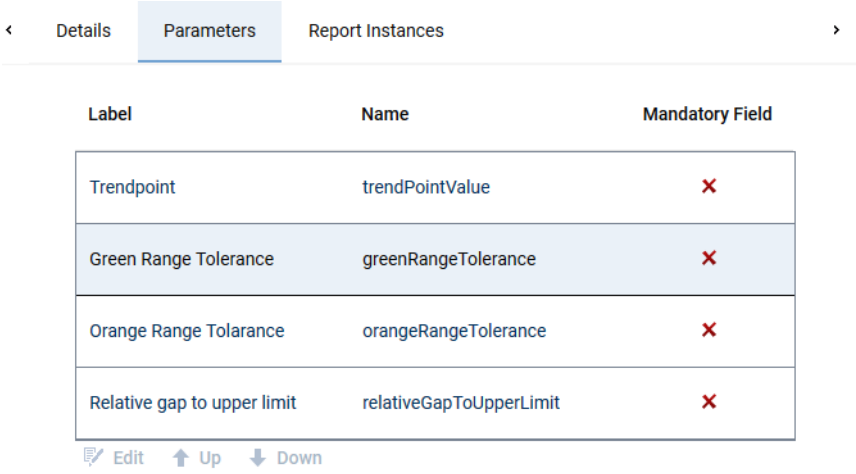


Fig. 73: Tab Parameters (example)

The tab has 3 columns.

Label	Here, you can see the saved label of the parameter.
Name	Here, you can see the saved resource string of the parameter.
Mandatory field	Here, you can see whether the field is a mandatory field: ✓ = mandatory field ✗ = no mandatory field

By clicking on the button *Up* and *Down*, you can change the order of the parameters.

By clicking on the button *Edit*, you can edit the selected parameter. See chapter "Edit parameters", p. 63.

6.2.1 Edit parameters

By clicking on the button *Edit*, you can edit the parameters. The parameters configured here are subsequently visible in the report instance and can then be edited with regard to their content.

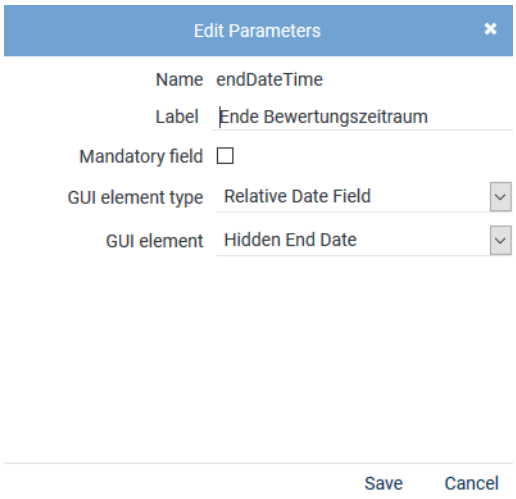


Fig. 74: Edit parameters

Name	Shows the name of the parameter.
Label	Enter a label for the parameter.
Mandatory field	Select whether the parameter is supposed to be a mandatory field or not. ☑ = mandatory field ☐ = no mandatory field
GUI element type	Select the type of the GUI element.
GUI element	Select the GUI element. Depending on the type of the GUI element you have different options.

ⓘ Only the parameters of report templates which have the status *Draft* can be edited. The parameters of released or deactivated templates cannot be edited anymore.

6.2.1.1 Edit GUI element

If you would like to change a parameter, select the corresponding combination of GUI element type and GUI element.

GUI element type	GUI element	Description
Recording Direction	Recording Direction	The program checks for the recording direction.
Selection Box Considered Period	Selection Considered Period	The program checks within the selected period of time. Possible considered periods: • Last Hour • Last 12 Hours • Today • This Week • This Month • This Quarter
Combo Box	Granularity	The program checks within certain time intervals. Possible time intervals: • Week (default) • Month • Year

	Time Unit	The program checks within certain time units. Possible time units: • Hour(s) • Minute(s) • Second(s)
Date Field	Date	The program checks for a certain date.
	Date/Time	The program checks at a certain time.
Input Field	Text Field	The program checks for certain texts.
	Text Field IP	The program checks for certain IPs.
	Score Field	The program checks for certain scores. For dashboards this parameter serves as trend value.
	Number Field (positive)	The program checks for certain positive scores. Entering a minus sign is not possible.
Check Box	Check Box	The program checks whether a certain check box has been activated.
Multiple Choice	Agents	The program checks for certain agents.
	Organization Units	The program checks for certain organization units.
	Evaluation Templates	The program checks for certain evaluation templates.
	Calibration Sessions	The program checks for the used calibration sessions.
	Supervisors	The program checks for certain supervisors.
	Calibrations	The program checks for certain calibrations.
	Keyword Lists	The program checks for certain keyword lists.
	Quiz Templates	The program checks for certain quiz templates.
	Customer Survey Template	The program checks for certain customer survey templates.
Multiple Choice (Limited)	Organization Units (Limited)	The program checks for certain organization units. You cannot select more than 4 organization units. This element is only available for system reports.
	Check Box	The program checks whether the check box of an organization unit has been activated.
Radio Button Group	Evaluation Status	The program checks for certain evaluation statuses. Possible evaluation statuses: • Released • Released, feedback pending • Released, feedback pending, ignored
Relative Date Field	Relative Start Date	The program checks between the relative start date and the current date.
	Hidden End Date	The program checks between the relative start date and the hidden end date.
Assignment	Evaluation Template Selection	The program checks the added evaluation templates.
	SCREEN*miner* Process Selection	The program checks for SCREEN*miner* processes.

6.3 Tab Report Instances

Here, you can see the report instances which have been assigned to the report template.

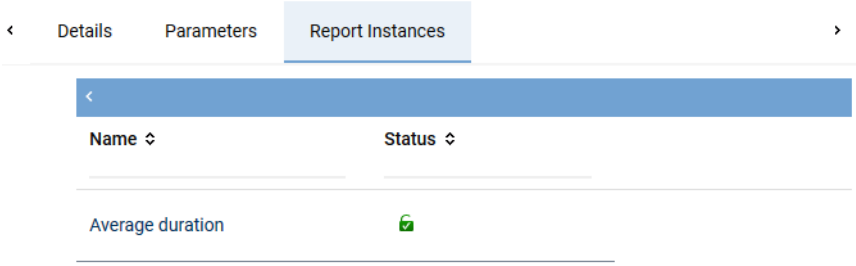


Fig. 75: Tab Report Instances

7 Create

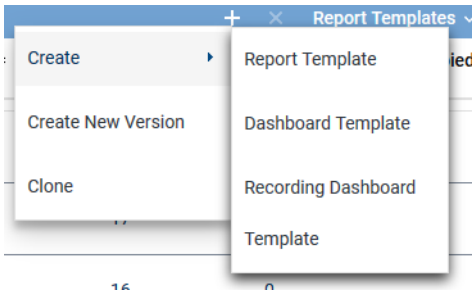


Fig. 76: Create

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

Create	Here, you can create a new *report template*, a new *dashboard template* or a new *recording dashboard template*.
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. The already released version is deactivated to prevent new instances from being cloned from old versions. This option is only visible if templates already exist.
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.

7.1 Create report template

1. Click on the icon + (*Create*) in the main view.
2. Select the menu item *Create*.
3. Select one of the following options:

Report Template	A new report template is created.
Dashboard Template	A new dashboard template is created.
Recording Dashboard Template	A new recording dashboard template is created.

Reports present the results in lists, tables, and diagrams.

Dashboards present the results in graphical form and have been tailored to the specific needs of agents. Since the dashboards in the Portal are refreshed cyclically, agents can check on their achieved scores and the way they evolve in a timely manner without having to log in to the Reports module.

4. Upload a template file by clicking on the button *Upload File* in the detail view, see chapter "Upload File", p. 69.
5. Complete the mandatory fields, see chapter "Tab Details", p. 61.
6. Click on the button *Save* to save the report template.
   To cancel the process, click on the button *Reset*.

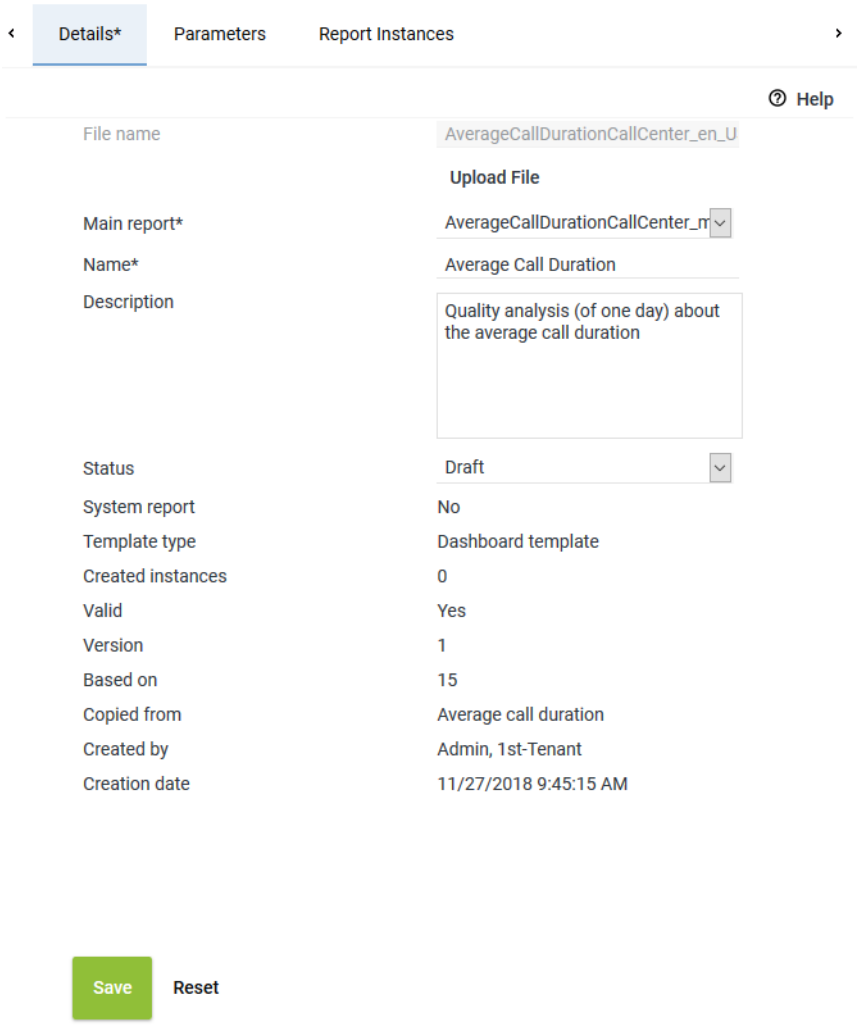


Fig. 77: Tab Details

ⓘ You can only upload files here which have been created with the Jaspersoft iReport Designer. The files and all resources (images and property files) have to be contained in the ZIP file.

8 Upload File

The used screenshots are exemplary. This process allows uploading ZIP files only.

1. Click on the button *Upload File*.

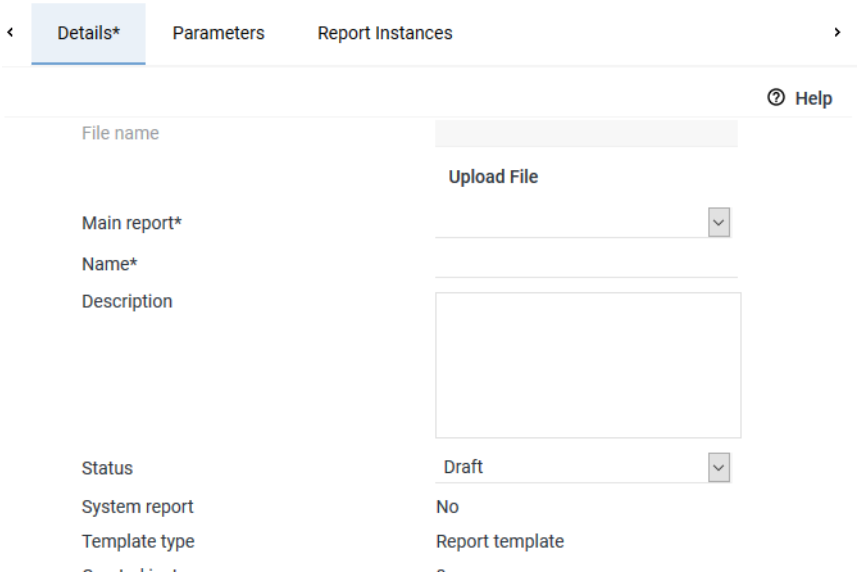


Fig. 78: Tab Details - Add file

2. In the opening window, click on the button *Choose File* or add the respective file by dragging and dropping it there.

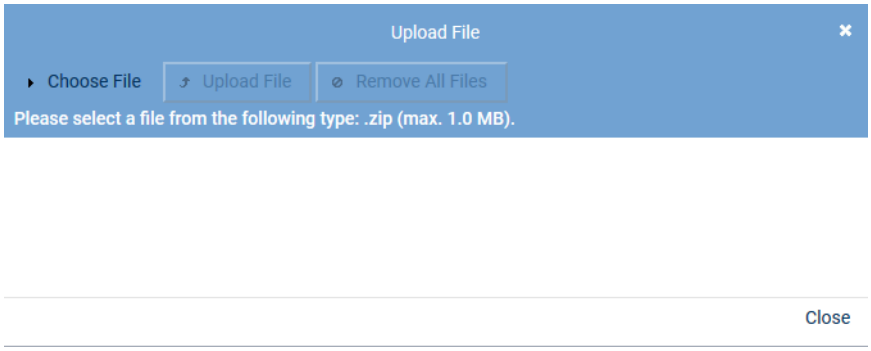


Fig. 79: Choose file

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

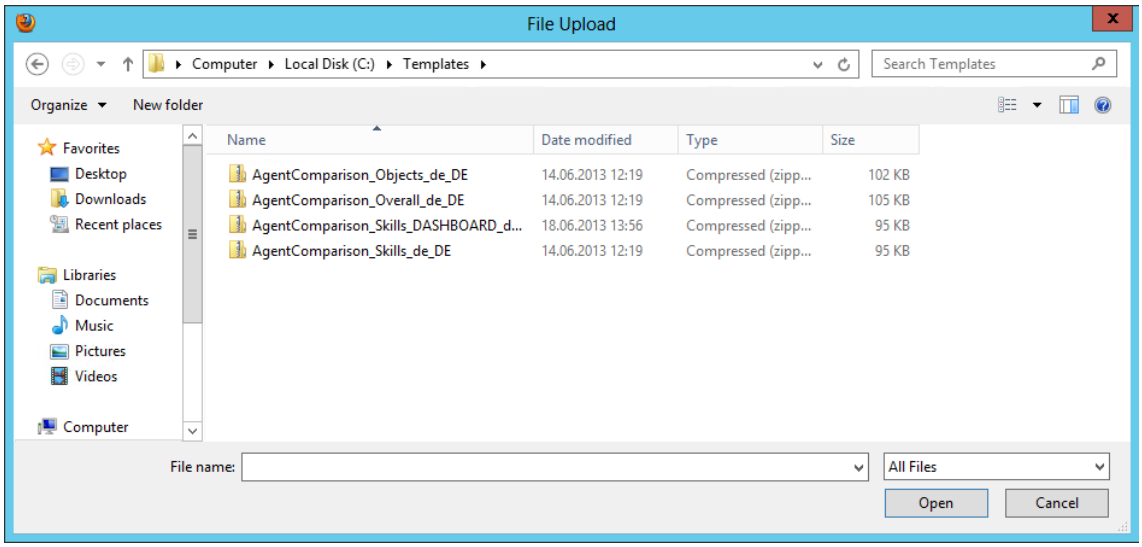


Fig. 80: Upload File

If required, you can repeat the last two steps and thus select several files.

4. To upload the file and apply it as report template in the detail view, click on the button *Upload File* next to the file you would like to upload.
   To remove a selected file from the list, click on the button *(Remove file)* next to the respective file.

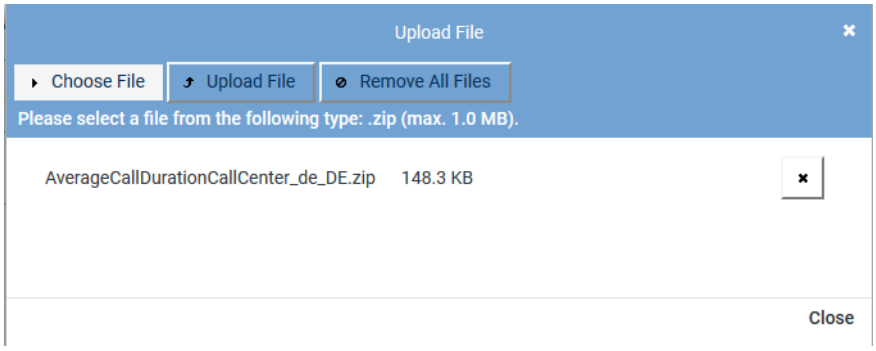


Fig. 81: Choose file

5. Upon clicking on the button *Upload File*, the respective file is uploaded.

6. To remove the selected file, click on the button next to the file or on the button *Remove All Files* to empty the clipboard.
   To close the window *Upload File* without emptying the clipboard, click on the button *Close*.
   To upload the file from the clipboard and apply it as report template in the detail view, click on the button *Upload File*.

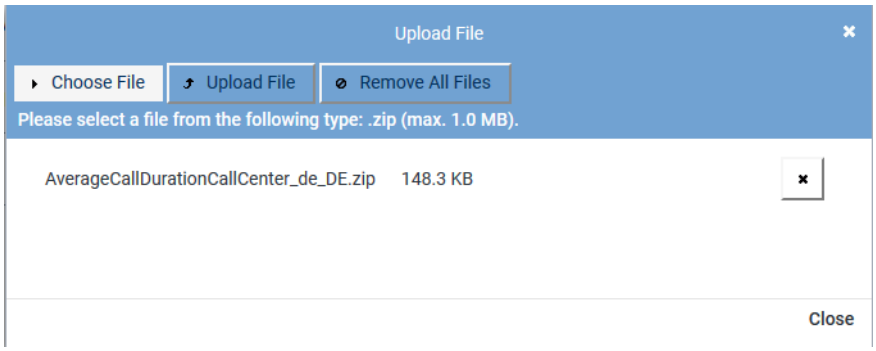


Fig. 82: Choose file

9 Export Report Template

To edit an existing template in the Jaspersoft iReport Designer, you can export the template. The user can then edit the files contained in the ZIP file in the Jaspersoft iReport Designer and upload them as edited ZIP file via the function *Create* as template.

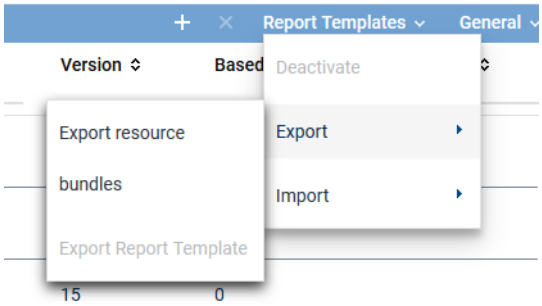


Fig. 83: Export report template

1. Click on the menu item *Report Templates* > *Export* in the toolbar of the main view.
2. Select one of the following options:

Export Resource Bundles	The resource bundles are exported. The resource bundles are localization files ending in **.properties*.
Export Report Template	The report template is exported.

Upon having selected one of the options, a ZIP file with the resource bundles or a ZIP file of the selected template is created which you have to save. You can edit the saved file of the selected template in the Jaspersoft iReport Designer.

10 Import system report template

This function allows importing exclusively system report templates. The system report templates are supplied by the ASC Updater. You cannot import your own report templates. This is only possible with the upload functionality via chapter "Create", p. 67.

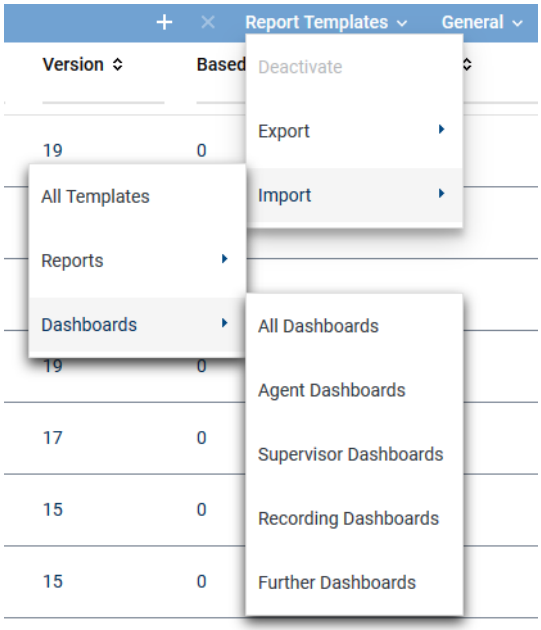


Fig. 84: Import system report template

1. Click on the menu item *Report Templates* > *Import* to import a system report template.
2. Select one of the following options:

All Templates	A window with all available system report templates opens in which you can select one or several templates to import them.
Reports	Here, you can select whether you would like to see all available report templates in a selection window or only a preselection of certain templates.
Dashboards	Here, you can select whether you would like to see all available dashboard templates in a selection window or only a preselection of certain templates.

Fig. 85: Selection of the system report template (example)

3. Select the respective template in the new window and click on the button *Import*.
   To cancel the process and discard the settings click on the button *Cancel*.

When importing system templates, a new version is created automatically if this template has already been imported previously.

List of figures

Fig. 1 Menu item Report Templates ... 7
Fig. 2 Agent feedback - overview ... 9
Fig. 3 Agent trend analysis - evaluation time ... 10
Fig. 4 Agent trend comparison - evaluation time (example) ... 11
Fig. 5 Agent trend comparison - session time (example) ... 12
Fig. 6 Agent comparison - evaluation template (example) ... 13
Fig. 7 Agent comparison - skills (example) ... 14
Fig. 8 Agent comparison - objects (example) ... 15
Fig. 9 Agent comparison - objects (detailed) (example) ... 16
Fig. 10 Agent comparison - overview (example) ... 16
Fig. 11 Detailed agent evaluation - graphical ... 17
Fig. 12 Detailed agent evaluation - text form ... 18
Fig. 13 Group trend analysis - evaluation time (example) ... 19
Fig. 14 Group trend comparison - evaluation time (example) ... 20
Fig. 15 Group trend comparison - session time (example) ... 21
Fig. 16 Group comparison - evaluation template (example) ... 21
Fig. 17 Group comparison - skills (example) ... 22
Fig. 18 Group comparison - objects (example) ... 23
Fig. 19 Agent comparison group-based - objects (detailed) ... 24
Fig. 20 Group comparison - overview (example) ... 24
Fig. 21 Group comparison - detailed (example) ... 25
Fig. 22 Supervisor productivity - detailed (example) ... 26
Fig. 23 Supervisor productivity - overview (example) ... 27
Fig. 24 Supervisor productivity - graphical (example) ... 27
Fig. 25 Calibrations (example) ... 28
Fig. 26 Supervisor comparison calibrations - graphical (example) ... 29
Fig. 27 Agent comparison - quiz results (example) ... 30
Fig. 28 Group comparison - quiz results (example) ... 31
Fig. 29 Training progress (example) ... 32
Fig. 30 Assessment keyword analysis (example) ... 33
Fig. 31 Keyword spotting - frequency (example) ... 33
Fig. 32 Time difference of process duration (example) ... 34
Fig. 33 Speech analytics - categories (example) ... 35
Fig. 34 KWS statistics (example) ... 35
Fig. 35 Information about deleted calls - agent (example) ... 36
Fig. 36 Information about deleted calls - agent- graphical (example) ... 36
Fig. 37 Information about deleted calls - agent group - detailed ... 37
Fig. 38 Information about deleted calls - agent group - overview (example) ... 38
Fig. 39 System disturbances in voice recording (example) ... 39
Fig. 40 Audit log report ... 40
Fig. 41 Voice recordings (example) ... 41

Fig. 42 Voice recordings (example) 41
Fig. 43 Import statistics (example) 42
Fig. 44 Recording check Cisco (example) 42
Fig. 45 Recording check Skype for Business (example) 43
Fig. 46 Recording content validation - example 43
Fig. 47 Extension check (example) 44
Fig. 48 Locked conversations (example) 44
Fig. 49 Calls of the user (example) 45
Fig. 50 Calls of the user in detail (example) 46
Fig. 51 Calls thought the day (example) 47
Fig. 52 My duration - agent (example) 48
Fig. 53 My score - agent (example) 48
Fig. 54 My quality - agent (example) 49
Fig. 55 My team score - agent (example) 50
Fig. 56 My team knowledge - agent (example) 50
Fig. 57 My knowledge - agent (example) 51
Fig. 58 My quality - supervisor (example) 51
Fig. 59 My team - supervisor (example) 52
Fig. 60 My team - supervisor, details (example) 52
Fig. 61 Recording Dashboard (example) 53
Fig. 62 Recording Dashboard (example) 54
Fig. 63 Recording Dashboard (example) 55
Fig. 64 Average call duration (example) 55
Fig. 65 Number of sessions (example) 56
Fig. 66 Detailed view of the QM sessions (example) 56
Fig. 67 Keyword analysis (example) 57
Fig. 68 Report templates - main view 58
Fig. 69 Toolbar Report Templates module 58
Fig. 70 Window Search Criteria (example) 60
Fig. 71 Report templates - detail view 61
Fig. 72 Tab Details 62
Fig. 73 Tab Parameters (example) 63
Fig. 74 Edit parameters 64
Fig. 75 Tab Report Instances 66
Fig. 76 Create 67
Fig. 77 Tab Details 68
Fig. 78 Tab Details - Add file 69
Fig. 79 Choose file 69
Fig. 80 Upload File 70
Fig. 81 Choose file 70
Fig. 82 Choose file 70
Fig. 83 Export report template 71

Fig. 84 Import system report template 72
Fig. 85 Selection of the system report template (example)..... 73

List of tables

Glossary

SfB

Skype for Business

UCM

Unified Communications Manager - Cisco IP PBX (Call Manager)

WAVE

WAVE file format is a container format to digitally save audio data and is based on the Resource Interchange File Format (RIFF) defined by Microsoft for Windows. (Source: Wikipedia 23rd February 2021)

Widget

Component of a graphical dialog system. Consists of a visible window and an invisible object which saves the configuration of the component. Interacts with the user and displays information which is updated regularly. (Source: https://de.wikipedia.org 15.07.2021)